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Elements of Expatriate Adjustment in Host Country Organizations

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Walden University

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Denise Schickel

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Walden University
2018

Abstract

Elements of Expatriate Adjustment in Host Country Organizations

by

Denise Schickel

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

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Abstract

Globalization and international business increasingly require the services of skilled expatriates in overseas offices. Over the past 50 years, numerous studies have focused on various factors affecting expatriate adjustment, primarily through quantitative research, reaching no conclusions on what factors in cross-cultural training would guarantee expatriate success. Expatriate failure has high personal and organizational costs. The purpose of this study was to use the qualitative methodology of narrative inquiry to investigate the adjustment, transition, and repatriation experience as a holistic process. Two theoretical constructions, Bandura's social learning theory, applied to the learning process in an international assignment, and social identity theory, represented key factors in the expatriate experience. The overarching research question investigated the distinct factors that contributed to the overall success or failure of an expatriate. Narrative inquiry, and open-ended questions, allowed the participants to reveal their stories. Participants ($N = 14$) were selected using criterion and convenience sampling. Interviews were recorded, transcribed, and coded into themes using an iterative process. Results established weak organizational support in the preparation and repatriation stages. Participants considered their assignments a success and exhibited strong self-efficacy and internal locus of control. The need for successful expatriate performance will continue to increase with globalization; findings in this study can contribute to the training, support, and repatriation of employees. The potential for social change includes the improvement in global business functioning and international understanding.

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Dedication

This dissertation is dedicated to Sam and Gladys for their unwavering love and support; and to Morris, a devoted friend.

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Chapter 1: Introduction to the Study

Introduction

“I knew I was going well in advance and I had talked to the people in the office ... but in the end I just got on the plane and left. Looking back, I arrived totally unprepared...” (Resp #39, Sup) (Santos & Looseman, 2013; p. 1104)

The challenges of an overseas assignment range from domestic to organizational issues. The individuals who are sent overseas by their employer for a specific work assignment, and are expected to return to the home organization, are characterized as expatriates (Sussman, 2011). An expatriate is a skilled individual who lives or works outside of his or her own home country on a non-permanent basis (Andreason, 2003; Santos & Loosemore, 2013; Ward, Bochner, & Furnham, 2001). Although there are various examples and types of expatriates, the most researched, and the focus of this study, are the corporate employees (Sussman, 2011).

These corporate employees fall into two categories. Individuals who have been assigned international service by their employer are *company-assigned expatriates* (CAEs) (Cao, Hirschi, & Deller, 2013; p. 57). This contrasts with the *self-initiated expatriate*, an individual who chooses to work abroad for purposes of career or personal fulfillment (Cerdin & Selmer, 2013; Doherty, 2013; Doherty, Richardson, & Thorn, 2013). The defining characteristic between these types is freedom of choice (Cao et al., 2013, p. 57). The self-initiated expatriate relies on their transferable skills and competencies that they can take to different organizations and locations, enabling them to take responsibility for their career paths (Andresen, Biemann, & Pattie, 2012). This

freedom and personal responsibility may not be available for the individual who is assigned by their corporation to work in an overseas posting. Therefore, it becomes important to discover the process experienced by the CAE, as the organizations that select them potentially bear responsibility for their training, support, and repatriation. A better understanding of the needs of the CAE and the responsibilities of the corporation can provide a better outcome in the overseas assignment. It was the purpose of this study to increase knowledge in this area.

The past several years has seen an increase in these international assignments as multinational corporations seek opportunities for growth and profit in foreign markets (Hechanova, Beehr, & Christiansen, 2003). The globalization of the workforce is increasing by these factors: in numbers of expatriates working abroad (Nolan & Morley, 2014), diversity within work places, and the growth of multicultural virtual teams. Morris and Robie (2003) presented the results of a survey conducted by Windham International in 1999, in which they discovered that 41% of corporate revenues were generated overseas, and it was expected that this trend would continue to grow in the future. Further, this investment in a CAE can be significant: One estimate held that it can cost the organization approximately two and a half times more to send an employee overseas than it would cost to hire a local national (Hechanova, Beehr, & Christiansen, 2003).

A wide range of research findings supported expatriate adjustment as a multifaceted phenomenon (Bhaskar-Shrinivas, Harrison, Shaffer, & Luk, 2004; McGinley, 2008) that includes the processes of enculturation, cross-cultural adjustment, and repatriation. These processes have various components, which will be discussed in

greater detail. Enculturation included all human activities and is the process of “learning how to think and behave as a member of one’s own culture” (Sussman, 2011, p. 394). Cross-cultural adjustment was defined as the “degree of psychological comfort and familiarity that the individual has for the new environment” (Black & Mendenhall, 1990, p. 122), and was determined by the cognitive and emotional satisfaction of the individual with the environment in the host country (Nolan & Morley, 2014). This adjustment phenomena included the three main aspects of the host culture as distinguished by Black (1988): general adjustment to the culture; interaction with the population; and work adjustment relative to the elements in their organizational work environment (Nolan & Morley, 2014).

Expatriate adjustment is a process of cultural learning on multiple dimensions. This learning was described as "the process of acquiring culture-specific and social and professional knowledge during a sojourn with an emphasis on minimizing intercultural conflict in social encounters” (Sussman, 2011, p. 396). The expatriate is faced with complex challenges on many levels ranging from job responsibilities, language and cultural differences, lack of familiar social support, as well as problems of adjustment for the family if they accompany the expatriate on the overseas assignment (Hechanova et al., 2003). In addition to host country arrival issues of acculturation and adaptation, the overall expatriate process is ongoing throughout the overseas assignment and into the repatriation phase when the expatriate returns to the home office and engages in further career development. Throughout this process the organization continues to play a part (Halsberger & Brewster, 2009). Research shows that very few companies manage this

process well and that the consequences of poorly supported repatriation can not only adversely affect retention of existing expatriate employees but also undermine the integrity and attractiveness of overseas assignments for future expatriates (Pinnington, 2011).

The motivating assumption for most expatriates to take an international assignment is that the experience will be a boost to their career overall. Nevertheless, even after a successful posting (meaning the CAE completed his or her assignment abroad) only 20-30% reported that it had a positive impact on their careers long term resulting in the individual leaving the organization (Zhu, Wanberg, Harrison, & Diehn, 2016). Due to the lack of clarity in this area, Harzing and Christensen's (2004) article on expatriate failure sought to expand this concept to include ambivalent feelings toward the assignment over time, rather than simple terms of failure or success, bringing a more ethnographic approach to the subject matter (Moore, 2011). Ambivalence can be defined as "to hold opposing affective orientations toward the same person, object, or symbol" (Smelser, 1998, p. 5). This idea of ambivalence refers back to the still popular classic study of Oberg (1960) on culture shock published in *Practical Anthropology* (Moore, 2011).

On the other hand, it was generally accepted that the definition of expatriate failure is a premature return from the foreign assignment (Dowling, Welch, & Schuler, 1999; Martinko & Douglas, 1999). Estimates of the failure rate of expatriates vary widely. Nevertheless, it is well known that the cost of this failure is high, both for the individuals involved, the organization, its relationship to the host country, its

international reputation, production, and personnel costs (Aycan, 1997, Cole & Nesbeth, 2014). The failed expatriate can experience a loss of self-confidence and self-esteem, loss of status in the organization, as well as lack of career advancement (Aycan, 1997; Mendenhall & Oddou, 1985; Puck, Kittler, & Wright, 2008).

Two fundamental difficulties in determining the facts on expatriate failure and success was the reluctance of many multinational corporations (MNCs) to make their data public (Sussman, 2011), and the lack of understanding of the expatriation and repatriation process. In results revealed by the National Foreign Trade Council in 2006, this failure rate was approximately 21% (McGinley, 2008). Some estimates put the cost ranges of an expatriate assignment from \$300,000 to one million per year (Selmer, 2001). Other researchers estimated that a failed assignment may cost the organization in the range of \$250,000 to \$1.25 million (Takeuchi, Tesluk, Yun, & Lepak, 2005).

Moreover, the failure of an overseas assignment is more extensive than the financial cost alone; failure has a negative impact on the MNC's reputation in the host country and can result in lost opportunities between the host country and the MNC (Aycan, 1997; Caligiuri, Hyland, Joshi, & Bross, 1998; Puck et al., 2008). Following a failed overseas assignment, the organization can find it difficult to recruit high performing individuals for future assignments, as well as suffer damage to the organization's reputation in the foreign environment (Black, Gregerson, & Mendenhall, 1992). Therefore, the importance of expatriate adjustment in these overseas assignments cannot be overstated.

The Researcher's Narrative: The Peace Corps in Morocco

Specific to this research project is the view of the expatriate transition process in a holistic manner—that is; viewing the procedures involved in selection, training, expatriation, adjustment and repatriation as a complete process. An autobiographical account of my Peace Corps experience illustrates the many facets of adjustment, and how specific to the individual the coping strategies may become.

I went to Morocco in the Peace Corps because I had visited there a few years earlier after graduating from college. While I was a tourist in Morocco, I became interested in Arabic, and studied it after returning to the United States. With that, and some French in college, I was moderately prepared to function in those foreign languages.

Prior to leaving the United States we attended a three-day orientation to meet the other volunteers and get organized. As far as I could tell, the selection process for the Peace Corps was based primarily on having a college degree and a willingness to go overseas. Being selected for Morocco was facilitated by my language experience and my desire to go there.

As a group, we flew to Morocco and went directly to the capital, Rabat, where Peace Corps headquarters was located. We resided in *Lycée*, a high school with classrooms and a dormitory. During the two months training in the summer, the training included Arabic-Moroccan dialect, practice teaching English as a foreign language, and cultural information sessions. Being in country provided us the opportunity for daily practice in language and cultural observation.

During the training, we had substantial support from the Peace Corps headquarters, close interactions with Moroccan locals on staff, and opportunities to bond as volunteers; there were about 90 in our group. It was fun and educational, I felt safe and excited to be there.

Upon completion of our training, we were assigned to various towns and high schools for teaching positions. I was assigned to a quiet phosphate mining town with three other American volunteers. We were sent to the towns with an allowance. We were expected to find a place to live, furnish it, get the electricity turned on, and get settled in our new schools, just as if we were moving into a city in our own country. It was challenging, but not impossible. I rented an apartment by myself for the first half of the year. Since I was alone, and the Arabs, in general, think people should not be alone, as explained to me by the family across the hall from my apartment, they, therefore, invited me over for dinner every night. I would go eat dinner and work on my homework; it was fun and educational.

Although on the street the women were covered in kaftans and wearing veils, they were not all confined to the house. My neighbor's wife had a job in the local government building and worked every day; they had a child as well.

The first day in town three of us (women) went to the open-air market at the edge of town. I could hear the locals talking about us as we walked by; it was strange; everyone in town knew the Americans were there. We had no problems shopping for our food and basics, and bargaining was a pleasurable social interaction. People were friendly and helpful.

The Peace Corps provided us with textbooks, so we did not have to design a curriculum, do lesson plans or figure out what to teach. We were assigned classes, and the first year I had four first-year English classes, which meant, I taught the same material to four different classes. I was very nervous about teaching, as I had no prior experience. I learned quickly that the students enjoyed English class, as it was easier for them than some of their other classes, and it gave them a chance to express themselves, speaking English.

The students were hard to control sometimes; they had a lot of energy and I obviously was a new teacher. But I learned quickly that if I spoke Arabic, they would sit in stunned silence, they could not believe I spoke Arabic; so, I used it to control the classroom.

There was no privacy in the town for us Americans. Everyone knew who we were and everything we did. I never did anything, so I had a good reputation with the students and no discipline problems. I went home with my students, met their parents, ate dinner with them, and my Arabic improved steadily. During the vacations I travelled around the country by bus and felt safe since I could speak Arabic, which seemed to give me some kind of special powers, it was amazing. The French colonized Morocco and did not learn Arabic. They not only required the Moroccans learn French, but the entire school system in which I was teaching, was based on the French *Lycée* model.

One of my strategies for fitting into the culture was to dress modestly; I covered my arms by wearing long sleeves, I wore either long pants or mid-calf length loose skirts, and I wore my hair tied back. I did not go out and party, like many of the French did.

The second year I was in a different town with two American Women, two men, and several French. The other Americans and the French did a lot of partying and they had a bad reputation with the students, which led to discipline problems in the classroom. As I said, everyone in town knew everything we did.

After my first year I requested a transfer to another town on the coast located about 50 miles south of Casablanca where I had friends; both American, European, and Arab. The second year I had three classes of second year English. This gave me the opportunity to teach more interesting material, including American songs and Arab folktales in English; the students loved it. I was more confident in my teaching skills and had great resources from the Peace Corps. I had a bicycle, put it on top of the local bus and went to Casablanca to visit friends every weekend. I took Jazz dance class from an African American dance teacher who taught at the Conservatory of Music, illustrating the diversity in their program. I also rode my bike around Casa, went to the Hammam (public bathhouse) with one of my student's Aunts, and generally lived a normal life, doing things I might have done in the United States.

It was comfortable, making enough money to live on but not too much to appear rich next to the locals. I was able to eat at regular restaurants, and shop at the market. I wore baggy clothes, speaking Arabic, while going to the Hammam, and spending time with my students and their families. In many respects the life I led in Morocco was similar to the life I would have been leading in the United States at that time despite a difference in cultural norms.

Nevertheless, although I was experiencing the Moroccans in their cultural context and assimilated to an extent by speaking to them in their language, their experience of me was limited by the lack of my cultural context. In addition, their cultural reference points for me were limited to movies and stories. There is a stereotype of American all over the world. I assimilated myself into their culture as much as I could as an American woman. I tried to date a couple of times, but the cultural difference was too great; I basically lived like a nun for two years. I had little social life outside of my role as a teacher, which, fortunately, was a respected position that gave me some status and protection. One evening another American woman and I were walking out of a restaurant on our way home, a Moroccan man blocked her way (she was petite and rather timid), I stood up to him and told him to get out of our way. The next day in class all my students were talking about it. They offered to take turns walking us home in the evening: they were protective towards us.

I think my students liked me because I spoke Arabic and lived a respectable life. The community at large was respectful towards us because we were teachers. However, the cultural concept of personal space is different for Arabs, and I felt the pressure of *eyes on me* all the time. However similar that Arab experience of being watched is to how that concept is expressed here in the United States; I did not enjoy the direct attention. I never felt in danger, but I felt harassed. On one of my trips to Casablanca a man followed me for several blocks. First, I tried to lose him by speaking to a policeman, but he did not go away. After a few blocks, it became unbearable, so I turned around and started

screaming at him in English. Everyone on the street turned around and looked. He ran away. No one said anything. I felt better.

I did not fit in with the other Americans the second year since I was not interested in partying, so I felt pretty lonely after a while. A couple times a year the entire group of Peace Corps Volunteers had meetings and that was a relief to see other Americans and share experiences. Also, the weekends in Casablanca were very important to me.

I felt stressed from the strain of being unable to fit into the culture enough to be comfortable, although there were things I enjoyed. I describe it as a love/hate relationship. I did the best I could, but in the end, I was glad to come home and be able to relax, although it did take me a few years to adjust to being back in the fast paced, competitive environment that is the US, particularly San Francisco. Morocco was slower and there was no competition, just learning.

When I returned there was little debrief. We were given a severance allowance; I think it was around \$2,000, and they returned us to our previous home city. We were also sent to the doctor for a complete physical and went for further medical treatment as necessary. Then we were back on our own.

I had developed a heightened sensitivity to body exposure and it was a long time before I felt comfortable wearing shorts or other revealing clothing, it felt naked after being covered up for two years.

I did not pursue a career in Arabic studies as I did not want to spend my life in a culture in which I was not comfortable, so I did not keep up with the language.

Nevertheless, it was a tremendous experience, difficult but satisfying, and I learned how to live and function in a culture far from home.

This narrative illustrates the process I went through during my two years overseas, and upon return, the continuing adjustment process. It shows the various elements involved, ranging from personal relationships, social interaction, foreign language usage, professional challenges, public response, and psychological responses. This exemplifies the overarching process I am looking to be revealed by my participants through the narrative inquiry approach to this study. It will be important to compare similarities and differences among the narratives of the participants and with my experience. This section has been included as an example of a narrative inquiry into the expatriate experience. The participant in this study has described her experiences in a narrative structure.

Problem Statement

Competition in international organizations has increased the need to assign and send employees on foreign assignments. This need requires a better understanding of the process and elements that facilitate a successful overseas assignment (Takeuchi, Wang, & Marinova, 2002). The expatriate experience has, in many cases, resulted in a negative experience caused by various organizational and personal factors (Hippler, Caligiuri, Johnson, & Baytalskaya, 2014). Despite extensive research in this area for the past 50 years, starting with Oberg's classic study in 1960, the concept of expatriate adjustment is still being investigated. The overall process of selection, training, support, and repatriation is fertile ground for more study.

Numerous variables are involved in the expatriate experience, and there is no certainty in the field regarding what exactly needs to be included in a cross-cultural training program to guarantee expatriate success. Therefore, there is still much that is not known about the overall adjustment, transition and repatriation process and experience of the CAE.

Purpose Statement

The purpose of this study was to use the qualitative methodology of narrative inquiry to investigate the CAE adjustment, transition and repatriation experience as a holistic process. The goal was to uncover additional factors that challenge, support and facilitate the overall process. Although this topic has been studied for over 50 years, most research has used quantitative methodology using surveys and questionnaires for investigation into the expatriate experience. Surveys and questionnaires focus on specific identified variables and may not provide an opportunity for discovery of new ideas and experiences to arise, which would then allow for a deeper understanding of the CAE experience as an overall process. One current viewpoint of this adjustment process has considered changes in the environment to be either positive or neutral, and therefore, some elements of the foreign environment will be more important to the individual expatriate than others (Hippler, Caligiuri, Johnson, & Baytalskaya, 2014). This viewpoint holds that prior statistical research may not adequately capture the expatriate adjustment process (Hippler et al., 2014).

The rationale behind the use of a qualitative research design was to deepen our understanding of these possible factors, and to discover new ones. Through the use of

narrative inquiry methodology to explore the expatriate experience, it was expected that previously unexamined themes would emerge when the story was recounted from beginning to end. It was hoped that this new knowledge will be used for further study and may also contribute to general knowledge development in a global organization's workforce.

Research Questions

Although the overall focus of the research was on the CAE process and experience, there were several underlying research questions that guided the research process.

These overarching questions were:

1. What factors facilitate expatriate adjustment?
2. What are the main challenges facing the expatriate?
3. What strategies did the expatriate use to adjust to their environment?
4. What kind of support for the expatriate was provided by the home office, the local office, and the host country nationals?
5. Did the expatriate experience difficulties relative to the difference in cultural dimensions, as discussed in Hofstede, Hofstede, & Minkov, (2010)?

Significance of the Study

The increasing globalization of the workplace means an increasing population of expatriates in many nations. Any information and knowledge that can be useful in facilitating their cross-cultural adjustment, and associated organizational effectiveness, will enhance both the lives of the individuals and the organizations.

An important element of this desired success is having the right people in the right positions. Choosing an individual for work in a foreign subsidiary can have a significant impact on the home organization in several ways. The cost for sending a worker overseas is substantial. The reputation of the organization abroad may be deeply affected by the expatriate's performance; and the career advancement of the expatriates may rest on their accomplishment abroad.

Analysis of the information provided by the participants' narratives may provide common themes useful in enhancing future training and development in corporations and Human Resource departments. This could contribute to a greater theoretical model for the management of the expatriate in all four stages of their assignment: the selection of the candidate, the pre-departure training, the in-country training and support, and the repatriation and further career development. The evolution of an underlying theoretical structure binding these four stages together could increase expatriate success, improve organizational functioning, and conserve resources lost from unsuccessful assignments. Returning expatriates can provide useful information to inform the organization's programs.

As a part of the organization dealing with talent management, human resource departments play a major role in the CAE's overseas success. By using organizational strategies in supporting the expatriate during the pre-assignment phase and throughout the assignment and repatriation, it was suggested that the CAE would have a successful experience, which includes increased job satisfaction (McCaughey & Bruning, 2005). It is further contemplated that a comprehensive four-part program including a selection

process, cross-cultural training, in-country support, and a repatriation system for the expatriates and their families can be developed from the findings.

Rationale for Methodology

In order to collect the type of data proposed by this study, the researcher chose qualitative methodology. It was the intention of this researcher to discover deeper features than have been provided by previous survey or questionnaire studies, which may not have covered the entire expatriate experience as a singular process. This researcher recognized that there are numerous and varied factors that affect the cross-cultural experience, and the individual's adjustment to the foreign environment. While it was impossible to uncover all the possible factors that would affect a person's adjustment, by doing a qualitative study and using a semi-structured interview research design, the researcher was able to gain a deeper insight into the actual experiences of individual expatriates and to discover previously unimagined elements. According to Scarneci-Domnisoru (2013), "Narrative data have become indispensable in understanding past experiences and events; the subjects' detailed and vivid descriptions cannot be accessed as efficiently with other research methods and techniques" (p. 21).

A significant factor in the study and analysis of expatriate adjustment has been that it is generally done from a static perspective, not considering that adjustment is a dynamic process that takes place over time and at different rates for different individuals (Zhu et al., 2016). Since most expatriate research has been quantitative, more qualitative studies could provide insight into the subtle elements of the process of expatriate adjustment, leading to more research topics (Halsberger & Brewster, 2009). Other

researchers have also supported the use of qualitative methods. Jugindar Singh Katar and Nik Mahmood (2017) provided an example in their quantitative study of emotional intelligence and its relationship to expatriate cultural adjustment and job performance. Although the authors considered the data useful, they thought that the self-reported questionnaires might be subject to bias and recommended further research into the topic with a qualitative design in order to discover more depth (Jugindar Singh Katar & Nik Mahmood, 2017). Qualitative methodology was well suited to investigate this depth and the psychosocial processes in the context in which they occur (Yardley, 2017, p. 295). It can highlight the personal within the social and cultural, by which the personal is shaped (Carless & Douglas, 2017).

Research Design

The data collected in this study were based on the narratives of expatriates about their overseas experience. The narrative method was an appropriate method for studying phenomena in a real-life context, providing new information for further research even if the number of participants was smaller than those who would participate in a quantitative study (Santoso & Looseman, 2013). Through the use of the narrative inquiry method, the expatriates were given the opportunity to tell these personal stories, revealing their experiences as a process.

The proposed study contemplated interviewing between 10-15 American participants who have completed their overseas experience with the support of an organization. The interview process was focused on obtaining narratives about the entire CAE process. All participants depended on their memory and any written material or

objects that they chose for reference and memory aids. A core set of questions (see Appendix A) was asked of each participant to allow for cross-comparison of narratives. The interviews generally lasted between 50 and 90 minutes and were recorded in one sitting with a possible follow-up interview for clarification of any issues. There were no follow-up interviews. There were a few clarification questions in an email, which the participants responded to in an email. There was no longitudinal aspect to the study.

There are three main variations of the narrative interview: open-conversational style, semi-structured, and structured. The open, conversational style contrasts with the structured interview, which presents specific questions. Taking the middle way, and the most frequently utilized method, is the semi-structured as it allows for more open-ended responses from the participants. According to Madill and Gough (2016) semi-structured interviews are “the most popular method of qualitative data collection/generation in psychology” (p. 440).

I used this approach to stimulate reflection and open-ended responses from participants. The specific questions addressed to each participant allowed discrete topics to be covered forming the basis of a comparative analysis among participants. At the same time there was sufficient room for individual interpretation depending on their experience. It was the telling of the story that allowed an individual to realize the meaning of their experience; and if the story took place over time, also allowed for dynamic change and process (Carless & Douglas, 2017). That is, a narrative is a movie, not a photograph. As narratives allow for rich insights into one’s lived experience

(Carless & Douglas, 2017), the use of narrative inquiry allowed participants to describe and convey the meaning they gave to their experiences through their reflections.

To obtain participants, I used a purposive sampling selection methodology described as the chosen units to be observed (Babbie, 2013). This sample selection process was one of convenience and of purposeful random sampling. An initial search for participants began by posting on LinkedIn, FaceBook, NextDoor.com, InterNations.org, and MeetUp.com to generate interest. I directly invited two participants due to personal knowledge of their overseas experience.

Following the initial responses from participants, I sent them the invitation to participate in the study and additional information about the research project. Each participant was invited without threat and undue inducement and could opt out at any time and for any reason. The arrangements for the interview process were made at the participant's convenience and took place in meeting rooms in the San Francisco Main Library, at their private workspace, and one telephone interview.

In response to the potential criticism that case study research findings are not generalizable, Flyvbjerg (2006) argued that while it is correct that the case study is a detailed examination of a limited sample, it is not true that a case study cannot provide reliable information about the broader population. While the advantage of large samples is breadth and representativeness, the advantage of case studies is depth and validity (Santoso & Looseman, 2013), two aspects that were important to this proposed research.

Definitions

Certain constructs were used within the body of the text and require clarity of definition. This section contains the definitions for those terms.

Ambivalence: “To hold opposing affective orientations toward the same person, object, or symbol” (Smelser, 1998, p. 5).

Cultural distance: “An individual's perception of differences between their own background and experiences in their host country” (Parkes, Bochner, & Schneider, 2001, Para. 8).

Cultural intelligence (CQ): “Consists of three fundamental elements: metacognition and cognition (thinking, learning, and strategizing); motivation (efficacy and confidence, persistence, value congruence and affect for the new culture); and behavior (social mimicry, and behavioral repertoire)” (Earley & Peterson, 2004, p. 110).

Cultural learning: “The process of acquiring culture-specific and social and professional knowledge during a sojourn with an emphasis on minimizing intercultural conflict in social encounters (Furnham & Bochner, 1982).

Culture shock: The impact of cross-cultural experiences for expatriates has been conceptualized as culture shock (Oberg, 1960). Oberg further defined culture shock as “anxiety that results from losing all of our familiar signs and symbols of social intercourse” (p. 177.)

Cross-cultural adjustment: The “degree of psychological comfort and familiarity that the individual has for the new environment” (Black, 1990, p. 122).

Cross-cultural training: “those educative processes that are designed to promote intercultural learning, by which we mean the acquisition of behavioral, cognitive and affective competencies associated with effective interaction across cultures” (Landis & Brislin, 1983).

Enculturation: The process of “learning how to think and behave as a member of one’s own culture” (Sussman, 2011, p. 394).

Expatriate: A person who lives and works outside of his or her own home country on a nonpermanent basis (Andreason, 2003; Ward, Bochner & Furnham, 2001).

Expatriate compounds: Self-contained expatriate communities exist in some countries where expatriates and their families can live. This situation may be due to cultural or economic differences. They provide a safe environment, a “home away from home” for the expatriate community (Lauring & Selmer, 2009, p. 1452).

Expatriate failure: A premature return from a foreign assignment (Dowling, Welch, & Schuler, 1999; Martinko & Douglas, 1999).

Locus of control: When a person perceives that they have control over, or an effect upon, external events, they are said to have internal locus of control. If they perceive external events to be outside of their control, and are at the effect of outward circumstances, they are said to have external locus of control (Rotter, 1966).

Person-environment fit (PE): Includes several elements: the job (PJ), the group, the organization (PO), and the vocation, (Makraiova, Pokorna, & Woolliscraft, 2013).

Person-job fit (PJ): “The congruence or match between a person’s characteristics and those of the job or tasks that are performed at work” (Lee, Reiche, & Song, 2010, p. 155).

Person-national culture fit: “The degree of an employee’s compatibility with either parent- or host-country business practices” (Herrmann & Werbel, 2007; p. 282).

Psychological adjustment: Psychological adjustment includes subjective wellbeing and mood; cross-cultural adjustment relates to the ability of the individual to fit in and manage everyday situations in the host culture (Selmer, 2001).

Self-efficacy: “An efficacy expectation is the conviction that one can successfully execute the behavior required to produce the outcomes” that they seek (Bandura, 1977, p. 79). Self-efficacy may facilitate expatriate adjustment (Black et al., 1992).

Assumptions and Limitations

Cross-cultural adjustment is considered to include both work adjustment and outside of work cultural adjustment. It was expected that the participants would be able to differentiate these and express the different challenges and successes they experienced in both these arenas. The main assumption about the participants was that they would be willing to share essential experiences of their overseas assignment in an honest and open manner.

Another limitation of narrative inquiry is that it is exploratory rather than explanatory. It was hoped that participants would be able to recover key elements of their expatriate experience that would prove useful in the narrative. This exploratory aspect might have been a disadvantage in the short term, but the material revealed

through the exploration also provided material for future studies since the purpose of the narrative was discovery, and the recovery of key elements of their experience made them, ipso facto, useful. The assumption was, that the experiences recalled by participants would have been significant enough to be useful in a research project. The fact that they could recall them signals their significance. Moreover, it was expected that I would be able to find mature and experienced individuals who could express themselves in a coherent manner.

Using a qualitative approach to study the effects of culture on a person was also a challenge that came with certain assumptions. National culture is not as homogeneous as it was, the effects of globalization and the movement of international workers, multiethnic work groups, virtual international teams, all contribute to the dissemination of ideas across cultures (Pratama & Firman, 2010). Therefore, although all the participants in the study were Americans, from the United States, it cannot be assumed that they all would have encountered their expatriate experience in a similar manner. While this singular (national) world-view may have informed their overseas experiences, it also prevented the discovery of experiential elements that might be present in other cultures. At the same time, this singular cultural view limited the variables that would accompany a multicultural participant pool.

Finally, a narrative interview research project is limited by a small sample size, particularly if the samples are of one cultural background with a relatively consistent world-view. For example, the United States is classified as a highly individualistic culture. China, on the other side, is classified as a collectivistic culture. One can suppose

that a Chinese expatriate would have a different kind of experience than an American. The only way to determine those differences would have been to do a research project with Chinese. Therefore, this project was limited by its focus on one nationality.

Summary and Organization of the Remaining Chapters

The global organization is growing in size and number, movement of workers is increasing among nations, the workforce is becoming more diverse, and different cultures are welcoming new organizations into their borders. Competition in the marketplace has intensified in this global marketplace, raising the stakes for organizations to be efficient and successful. These factors signal that expatriate adjustment is a complex, multidimensional topic, and there is a growing need for understanding in this field.

Many research papers have approached the field from a quantitative analysis. In order to gain more insight into the complexities of the expatriate experience, this study was qualitative, using narrative inquiry to discover more of the expatriate experience. There are no industry wide consistent cross-cultural training programs that might have solved the problems the expatriates faced. The approach of this study was to determine what might be more useful in these training programs based on those expatriate experiences.

A study, by Gregersen and Stroh (1997) presented information on the level of repatriation adjustment of the Finnish expatriate and their spouse using a Likert scale. However, this study did not provide any details of the expatriates' experience, which would have been useful and could have been obtained through an additional narrative research method. The authors recommended practices such as frequent home visits

during the overseas assignment, job clarification upon repatriation, and a degree of role discretion be pursued for the expatriate upon return (Gregersen & Stroh, 1997, p. 640).

The benefits of a successful overseas assignment to the individual are immense in terms of better job performance, more job satisfaction, better adjustment of the expatriate and their families, further career development, and an overall better reputation for the organization's expatriate program. The organization would benefit by a better overseas reputation and save money with a decrease of early assignment termination.

The following chapters explored the literature on the primary issues involved in the expatriate process. Chapter two surveyed previous empirical studies on the expatriate and cross-cultural experience to discover the factors that underlie both the success and failure of the expatriate process. The methods of these prior studies were also reviewed, as well as finding further support for the use of qualitative methodology and narrative inquiry proposed for this current study. Chapter three examined these issues further, detailing the research, data collection and analysis process, as well as the selection of participants.

Chapter 2: Literature Review

Introduction

Global business is growing, generating the need for more workers in foreign offices. The stakes for the success of these expatriates, and their organizations, continue to increase. Financial, public relations, market share, development of talent, increased knowledge base, and competitive advantage are among the factors affected by expatriates' success or failure in an overseas assignment.

In addition to these external factors, expatriates have various psychological, social, cultural, and linguistic challenges, which require greater understanding. It has been established that going to a foreign environment can be stressful. This stress can be managed by support in the environment. Sources of support for the expatriate are the organization, the supervisor, and the spouse (Kraimer, Wayne, & Jaworski, 2001). McGinley (2008) cited various human costs of unsuccessful expatriate adjustment such as underperformance, (Black, Gregersen, & Mendenhall, 1992; Halsberger & Brewster, 2009) loss of self-confidence, loss of prestige among peers (Mendenhall & Oddou, 1985). along with damaged relationships and careers (Tung, 1982).

While cross-cultural training can be supportive to expatriates, it is inconsistent among various organizations, without a current underlying theory informing these trainings. Human resource departments also do not appear have procedures or best practices that are effectively followed. Further, most of the studies on cross-cultural training have been quantitative. Therefore, despite the recognition of these important gaps, the research on this topic was inconclusive regarding what was necessary to make

overseas assignments a success. Further, this research revealed that there is still much that is not known about the overall adjustment and transition process and experience of the CAE.

Tseng, Chou, and Yu (2010) determined that the field of expatriate research had coalesced around three main subdivisions: expatriate adjustment, global leadership, and repatriation adjustment in their bibliometric analysis of the literature between 200-2008. This research study focused on expatriate adjustment and repatriation adjustment, leaving global leadership aside as a separate category. Along with other organizational issues faced by expatriates, I organized the topics under these four headings: elements of culture, organizational factors, individual factors, and social support factors. I reviewed studies in each of these areas.

In addition to this focus on adjustment and repatriation, and in order to conduct the background to this research, the following databases were used through Walden University library: Academic Search Complete, Business Source Complete, ERIC, Political Science Complete, PsycARTICLES, PsycBOOKS, PsycCRITIQUES, PsycEXTRA, SocINDEX, Sage, and some Google Scholar. This search was undertaken over a period of two years at different times during the dissertation phase. The key words searched under Boolean/Phrase were expatriate adjustment, cross-cultural adjustment, cross-cultural training, expatriate, expatriate failure, international business and expatriates. An example of one of the iterations of this research is as follows. This produced numerous articles in the amount of 588; 557; 3467; 19,014; 126; and 1546 respectively. The Taylor & Francis Online search of expatriate adjustment produced 28

databases with 5207 articles. ProQuest Central, including dissertations from the year 2007, produced numerous results for expatriate adjustment; expatriate training, cross cultural training, and qualitative study of expatriate adjustment (mostly in the dissertation category, which I did not use). I found the majority of the articles to not be pertinent while reading through the titles and abstracts and selecting the appropriate articles for this topic.

Based on this review, the following topics have been covered in the literature review and were deemed to be relevant in understanding the expatriate process and experience: elements of culture, language and culture; proxemics in culture; time; global human resources (HR); organizational factors including pre-departure training and orientation, role ambiguity, individual factors, spousal and family issues, personality traits, person-environment fit, ethnocentrism, as well as social network support. In this study I also used social learning theory (Bandura, 1977) and social identity theory (Walker & Lynn, 2013) as the underlying theoretical constructions.

Historical Trends in Globalization

The 1960's saw the transformation of American business into a more international focus with the mergers of oil and gas corporations. The founding of the US Peace Corps at this time further stimulated the interest in cross-cultural training and expatriate adjustment (Sussman, 2011). With the selection of Peace Corps volunteers, there was an increase in research in the selection criteria for the suitable candidate, however this did not gain momentum and was not supported by a general theory (Shaffer, Harrison, Gregersen, Black, & Ferzandi, 2006). Psychology became interested in the process of

transition of these individuals, as Adler (1975) published his qualitative findings in new journals, among them, the new *Journal of Cross-Cultural Psychology* (Sussman, 2011, p. 396).

The difficulties in defining expatriate adjustment are further complicated since the study of cross-cultural issues has evolved over the decades, and included such conditions as psychological adjustment, to the cognitive withdrawal behaviors which precede early termination, to finally an assessment of job performance by the expatriate (Shaffer, Harrison, Gregersen, Black, & Ferzandi, 2006). Psychological adjustment in general, and cross-cultural adjustment in particular, arises from the interaction of the person and the environment (Hippler et al., 2014; Nolan & Morley, 2014). Psychological adjustment focused on the subjective state of the individual, including wellbeing and mood, whereas the ability to function in the foreign environment was considered sociocultural adjustment and concerned the ability of the individual to fit in and manage everyday situations in the host culture (Selmer, 2001).

Adjustment Studies

Expatriate adjustment studies began by focusing on the ability of the expatriate and their spouses to adjust to the foreign environment (Hippler et al., 2014). This evolved through the studies of Black, Mendenhall, and Oddou's 1991 model of expatriate adjustment that used the 14-item measure of Black and Stephens in 1989 (Hippler et al., 2014). The authors, having had extensive overseas work experience, identified nine paradoxes present in the expatriate experience (Osland & Osland, 2005). They used these paradoxes as items in their study. The paradoxes existed in three categories: (1)

identification and personal boundaries, (2) relationships with the other culture, and (3) job related role conflict.

In a mixed-methods study concerning the role of paradox in the cross-cultural experience, the researchers used a grounded method analysis of the interview data following a demographic questionnaire that measured cultural involvement (CI). CI referred “to the level of adjustment and acculturation demands made on expatriates based on the degree of interdependence in their work and their personal predisposition and experience at entering other cultures” (Osland & Osland, 2005, p. 111). The study was limited to 35 participants in a variety of industries represented by 16 countries. The interview included both structured and unstructured questions, a paradox awareness instrument, and a description of a paradox using the critical incident technique. The results articulated these paradoxes, presented the expatriates’ approach to managing them, and providing material that could be used in future coaching and training of expatriates (Osland & Osland, 2005).

A study by McGinley (2008), referred to a research methodology used by Black and Stephens’ (1989) seven-item general adjustment scale. This scale asked respondents to “Please indicate the degree to which you are unadjusted or adjusted to the following conditions”. Among others, conditions included items such as “Living conditions in general,” “Housing conditions,” “Food,” “Shopping,” and “Cost of living.” This scale has been widely used as a measure expatriate adjustment and has been validated by a meta analytic review conducted by Bhaskar-Shrinivas et al. (2004). Further analysis was gained by using Ong and Ward's (2005) 18-item Index of Sojourner Social Support

(ISSS) Scale as a measure of social support for coping behavior (McGinley, 2008). Factual items measured both experience and language ability with experience items assessing previous and current experience abroad. For example, respondents were asked, “How much prior experience with international assignments do you have?” and “How long have you spent abroad in your current international assignment?” The language survey item asked participants to respond to the question “How well do you speak Russian?” on a five-point Likert scale (1 = Not at all; 5 = Fluently). Themes in these questionnaires have the ability to inform follow up questions during the structured interview process in the second interview with the participants.

Hippler et al. (2014) have followed a separate model, which distinguished between psychological adjustment and sociocultural adjustment. The continued ambiguity of the dimensions of the adjustment construct over the years, the inconsistencies in the results, and the lack of consistent meaning of the work ‘adjustment’ itself among expatriates, has called for another approach to determine the importance of the various elements of the environment to which the expatriate must adjust (Hippler et al., 2014).

Theoretical Foundations

Two main theories provided theoretical foundations for the basis of the study of expatriates, and in particular, the CAE. The use of social learning theory (Bandura, 1977) is based on the concept that the elements of this theory were directly applicable to the learning process required to undertake an international assignment. Social identity theory (Walker & Lynn, 2013) represented key factors in the experience one undergoes in

the transition from living one culture or society to living another. The dual issues of learning and identity are always present for the CAE.

Social Learning Theory

Albert Bandura's (1977) social learning theory is composed of four elements: attention, retention, reproduction, and motivation. Attention to observed behavior is influenced by the functional value of the behavior, its prevalence, complexity, and importance. Retention of this observed behavior is achieved through cognitive organization, symbolic coding into language so it is easily remembered, and both symbolic and motor rehearsal of the behavior. The motor reproduction of the target behavior depends on the physical capabilities of the individual, along with the self-observation of this reproduction and feedback from the environment. The motivational processes behind the learning are reinforcement from within the self and the external environment (Bandura, 1977, pp. 22-29).

Albert Bandura's social learning theory provided a useful model for training program use to facilitate how expatriates came to, at the very least, behaved appropriately in a foreign environment, in alignment with local norms; and to gain a deeper understanding of the behaviors of the host nationals. The research examined the strategies that that individuals working overseas employed in a spontaneous way—attention, retention, and reproduction—that were contained in social learning theory as they shared how they learned to function in the foreign environment.

The four-factor model of social learning theory: attention, retention, reproduction, and motivation (Bandura, 1977) can easily be applied to the cross-cultural experience.

Attention to one's surroundings is heightened in an unfamiliar environment as we strive to navigate through it safely. Working abroad as professionals, we will need to behave in an appropriate manner in order to be successful in the workplace and in social situations. Therefore, we will be looking for clues as to how to behave and be effective, stimulating our attention. Retention depends on the cognitive capacity of the individual, and is strengthened by retaining mental images, and rehearsing the behavior. Reproduction of the desired behavior includes awareness of the self and reproducing the physical behavior and practice. Motivation to learn the new behavior is stimulated by perceived rewards, memories of past positive results, and observation of a behavior being successful in producing the desired results (Bandura, 1977).

Exposure to the different sights and sounds of a different culture is particularly significant for a person who has not been abroad. As we are bound by our language and culture that surrounds us, the first foray into a strange land can be quite disorienting, causing what has been described as culture shock (Oberg, 1960). Being disoriented and stressed is a strain on cognitive processes (Palmer, Economou, Cruz, Abraham-Cook, Huntington, Maris, & Maley 2014). Cognitive processing is important for social learning. Cognitive processes that regulate behavior are highly verbal as well as visual and are important for observational learning and retention (Bandura, 1977). Therefore, any strategies that can decrease the culture shock of the individual would be useful in their learning and successful adaptation in the new environment.

Social Identity

Theories of social identity are concerned with the individual and how the relationship between individuals, and individuals and institutions shapes behavior (Walker & Lynn, 2013). Social identity is constructed from group membership, in contrast to personal identity, which is displayed in interpersonal interactions (Brown, 2000). In social identity, individuals seek to maintain self-esteem and positive in-group identity (Brown, 2000), which leads to group categorization (Abrams, 1999).

One consequence of group categorization is the implication of in-group homogeneity, which leads to the perception of out-group homogeneity, or rather, stereotyping, as a means to understand and relate to the 'other' (Brown, 2000, p. 750). This need to understand a foreign national, the expatriate, would be a natural response of the host country nationals and is mediated through interpersonal interactions between the expatriate and host country nationals. Another strategy to diminish the group categorization difference is to subsume both the expatriate and the host national into the larger category of the organizational structure for which they all work (Brown, 2000). However, more study is needed to focus on the strength of these various connections between individuals, and social network analysis has been one tool used to measure the importance of role-based others in an individual's network (Walker & Lynn, 2013, p. 153). Social ties among individuals are maintained as everyone maintains the identity created by those roles, and this is influenced by the emotional and social attachment among them (p. 169).

Review of Literature

The literature review covers theoretical work concerning the overall factors affecting the expatriate individual and the family who often accompany the expat to the new assignment. The elements of culture, organizational factors; individual factors and social support system factors are reviewed. Organizational support through the expatriate cycle: selection, adjustment, and repatriation are also covered. Finally, the literature review addresses the methodologies used in the study to examine the expatriate experience, and explores the history of narrative inquiry, the methodology used in this study.

Elements of Culture

Different geographical and national groups have their distinct histories. Assessing the dimensions of culture apart from those histories has been the work of two foundational theorists in the field, Geert Hofstede (1980) and Edward Hall (1959). This section will cover the basic dimensions of culture as discussed by these two researchers.

Edward Hall (1959) began his exploration of culture as a training tool for diplomats of the US State Department when no trainings existed. His approach dissected culture into ten elements: interaction, association, subsistence, bisexuality, territoriality, temporality, learning, play, defense, and exploitation (using materials) (pp. 45-46). Taken singularly or within the complex relationships among them, these elements required understanding for proper functioning within a cultural context.

Interaction included the use of language, which plays a substantial role in the foreign experience. Hall (1976) described cultures as being expressed along a continuum

of high or low-context. Language communicates messages. In a high-context culture, Hall (1976) asserted, knowing the language was not sufficient for understanding, one also needed to have a deeper understanding of the cultural norms. According to Hall (1976), much of the cultural norms and information were internalized in people, and the details did not need to be communicated explicitly in the language. In high-context cultures, time was required to program all the necessary cultural information into the individuals, while the communication itself occurred quickly and efficiently as a result. Low-context cultures were the opposite. In a low-context culture the language was explicit and detailed, providing the information required to facilitate understanding. Without the overall internalization of the culture's norms; the information must be transmitted explicitly and in detail (Hall, 1976).

The concept of association included group behavior and hierarchical status, which also varies greatly relative to national character (Hall, 1959). Subsistence related to food, mealtimes, work contexts and behavior, which also have elements of status, and language appropriate to each situation (Hall, 1959, p. 49). Sexual reproduction, and differentiation are complex and may encompass rigid patterns of behavior, including elements of language and territory (Hall, 1959, p. 50). The concept of territoriality is expressed by all species of animals as well as humans, and the need for one's own territory is fundamental to their existence. Space, and its use, influence various other cultural elements, and can be quite subtle (Hall, 1959, p. 52). Temporality, the use of time, flows through all aspects of a culture; some elements may be obvious, and others may be more subtle (Hall, 1959). All organisms learn and adapt to survive. Humans are able to learn in

different ways, and this is influenced by, and in turn, influences their culture. When someone goes overseas into a foreign culture they will have to learn how to learn differently, this can be a difficult task (Hall, 1959, p. 53).

Play, another element of culture, has aspects of space (place), time, interaction (competition), and even learning (Hall, 1959, p. 57). Defense is a part of the lives of animals and other life forms as well as humans. We have developed our defensive strategies to a sophisticated and complex level, including wars, law enforcement, medicine, and even religion (Hall, 1959, p. 57).

Exploitation of the materials of the environment requires adaptation, such as the teeth of the tiger or our opposable thumb. Moreover, humans have developed extensions of their bodies to interact with or manipulate the environment: tools for work, toys for play, money for extension of labor exchange, language and learning; the development of technology permitted storing knowledge (Hall, 1959, p. 60).

According to the classic study on the dimensions of culture by Geerte Hofstede in 1980 (Hofstede et al., 2010), culture consisted of three main elements: identity, institutions, and values. Both identity (language and religion) and institutions (laws, rules, and organizations), are visible, whereas the values (“software of the mind”) are not (p. 22).

According to Hofstede’s (1980) classification of culture, there were several dichotomies that affected values and behavior; and these categories needed to be understood to better function in a particular environment. Hofstede (1980) termed these factors: individualism *versus* collectivism; uncertain avoidance; power distance; and

masculinity *versus* femininity. In later studies Hofstede et al. (2010) have added additional dimensions of culture such as: assertiveness *versus* modesty; cultural orientation to time; and the subjective dimension of wellbeing and happiness, organized along the lines of indulgence *versus* restraint.

One of the most fundamental dimensions of culture was the concept of individualism *versus* collectivism (Hofstede et al., 2010). Individualism appeared in “societies in which the ties between individuals are loose: everyone is expected to look after him- or herself and his or her immediate family,” (Hofstede et al., 2010, p. 92). Collectivism was expressed in “societies in which people from birth onward are integrated into strong, cohesive in-groups, which throughout people’s lifetime continue to protect them in exchange for unquestioning loyalty” (Hofstede et al, 2010, p. 92). America was identified as one of the most individualistic cultures. This individualistic orientation has posed a particular challenge for Americans when they move abroad to a more collectivist culture.

Uncertainty avoidance represented another practical cultural strategy affecting organizational functioning. As a national culture tendency, “Uncertainty avoidance [represented]...the extent to which the members of a culture feel threatened by ambiguous or unknown situations” (Hofstede et al., 2010, p. 191). The expression of high uncertainty avoidance generated more rules and structure, signaling a need for predictability in the environment, whereas low uncertainty avoidance allowed for a more relaxed approach to life (Hofstede et al., 2010).

Another dimension with multiple repercussions for the expatriate is the element of power distance. Power distance represented “the extent to which the less powerful members of institutions and organizations within a country expect and accept that power is distributed unequally” (Hofstede et al., 2010, p. 61). In countries with a high-power distance index, power is distributed unequally among individuals and especially those in authority. In general, the people accept this power differential. In countries with a low power distance index there is greater equality (Hofstede et al., 2010).

The category of masculinity *versus* femininity also represented a dimension of culture. In masculine cultures, “men are...assertive, tough, and focused on material success, whereas women are...more modest, tender, and concerned with the quality of life” (Hofstede et al., 2010, p. 140). In feminine societies, “emotional gender roles overlap: both men and women are supposed to be modest, tender, and concerned with the quality of life” (Hofstede et al., 2010, p. 140). This dimension also intersected with the gender roles of male and female, which can vary greatly among the United States, other Western nations and more traditional societies. Related to the concept of gender roles, the dimension of assertiveness *versus* modesty provided another dimension of misunderstanding between cultures as one may perceive the other as either too assertive or not self-confident enough, depending on the circumstance (Hofstede et al., 2010).

Hofstede et al. (2010) also examined the difference in cultural orientation to time. “Long-term orientation... the fostering of virtues oriented toward future rewards-in particular, perseverance and thrift” *versus* “short-term orientation...the fostering of virtues related to the past and present--in particular, respect for tradition, preservation of

“face”, and fulfilling social obligations” (Hofstede et al., p. 239), directly affected all aspects of a society, especially how the expatriate’s time was spent in the host country, as well as the interaction with host country workers.

What may be considered as a subjective dimension; that of wellbeing and happiness, has been organized along the lines of indulgence *versus* restraint, and also can affect many aspects of the culture. “Indulgence is a tendency to allow relatively free gratification of basic and natural human desires related to enjoying life and having fun. Restraint is...a conviction that such gratification needs to be curbed and regulated by strict social norms” (Hofstede et al., 2010, p. 281).

Language and culture. Language and cultural differences play a role in both work-related adjustment and adjustment to outside work interactions with host nationals. It is well known that different cultures have different ways of doing business (Hofstede, 1980). One important factor in expatriate adjustment is whether or not the expatriate is willing to use the language in communicating. Investigating American expatriates in Japan, Peltokorpi (2008) found language proficiency to be a significant factor in host country relationships.

Zhang and Peltokorpi (2016) referred to language use as basic element of social identity as communication among group members reinforces group identity. While this supported the idea that language usage would be an important factor in expatriate adjustment, according to Zhang and Peltokorpi (2016), relatively little research has addressed the issue. In their study, semi structured interviews were used with 70 expatriates and HCN employees in 13 Nordic subsidiaries in Beijing and Shanghai over

the years 2006-2007. The data analysis was inductive; an open coding technique was used that looked for similarities and differences among the stories (Zhang & Peltokorpi, 2016).

Using social identity theory, the researchers discovered that language proficiency affected various elements of the expatriate experience in China and illustrated how language differences separated the expatriate (as out-group members) from HCNs (Zhang & Peltokorpi, 2016). Expatriates could be excluded from the HCNs by speaking their native language, and vice versa. They found that translations were difficult, communication styles made it difficult to understand the meanings behind the words; not being able to speak Chinese prevented the expatriate from influencing the Chinese and prevented building networks in business. Further, it limited interactions in every aspect of daily life and tended to isolate foreign workers in expatriate communities (Zhang & Peltokorpi, 2016, 1462-3).

Despite that, surprisingly, the expatriates with a high proficiency of Chinese language experienced a distancing by the local Chinese who were nervous around them (Zhang & Peltokorpi). In terms of social identity theory, high levels of adaptive behavior could also have a negative effect because the expatriate was still seen as an outsider, and this behavior also threatened group identity (Zhang & Peltokorpi, p, 1464). Thus, language can be a bridge or a wall.

According to Black (1988) cross-cultural adjustment is based on how comfortable the expatriate is in the foreign environment. This cross-cultural adjustment is generally

conceived as three facets: general, work, and interaction with the HCN's (Bhaskar-Shrinivas et al., 2005).

Proxemics. The study of space in a cultural context, and its effects on social organization and behavior is known as *proxemics*. Space management includes physical presence, and the perception receptors of sight, sounds, smell, and touch. How different cultures organize in relation to the complex elements of proxemics varies widely and is seen as fundamental to successful interaction within each culture (Hall, 1966). Hall described four distinct spatial categories: intimate, personal, social, and public, each with their own distance range (Hall, 1966).

Different cultures express visual space and privacy very differently, and the following examples served to illustrate this. In America, a small group of people in conversation is treated as though they are in a private space – even if they are visible, and even if they can be overheard, one does not listen (Hall, 1966). The Germans cannot experience privacy if they are visible to others, they feel intruded upon if someone is looking at them (Hall, 1966). This tendency is illustrated in their practice of fencing their gardens, keeping their office door closed, (in contrast to most American open office doors), and generally having double doors in buildings which are sturdily made to keep out sound (Hall, 1966). The English have less of a requirement for a room of their own than the Americans; they internalize their private space and expect others to respect it (Hall, 1966). In contrast, the French crowd together in public spaces, such as cafes, more than the northern Europeans, English, and Americans (Hall, 1966). The Japanese do not mind sharing the space with others, but they mind sharing a wall of their house with

another and need a small slice of space surrounding their house, in which they often create a small garden (Hall, 1966). Finally, Arabs generally crowd around each other in public spaces with no distress and may even consider that the body is not the boundary of the person, but that the person resides deep within the body (Hall, 1966). Even though their homes are spacious, they are not walled structures, as the Arab does not like to be alone. When an Arab wants to be alone, he stops talking (Hall, 1966).

Time. The Sun rises and sets, the Seasons follow one another, and it would appear that time is part of the physical world that is consistent across cultures. This is not the case. Different cultures not only organize time differently, they actually experience time differently from one another, and this can present tremendous confusion and difficulties for foreigners (Hall, 1983).

According to Hall (1983), two main systems of organizing time are polychronic, p-time, and monochronic, m-time. M-time is found in northern Europe and America, time is scheduled, one thing at a time is done; in p-time many things can happen at once, relationships are taken into consideration, an event continues onto completion (Hall, 1983). M-time is task oriented whereas p-time is more relationship oriented; this reflects cultural values and influences behaviors (Hall, 1983).

Organizational Factors

To be successful in the global marketplace, MNCs must manage their global workforce. In order to avoid expatriate failures and lost business opportunities, global businesses must consider a variety of factors. The complexity of factors involved in determining expatriate adjustment have lead some corporations to either choose the

person who has been willing to accept the assignment or to base the selection on technical expertise alone (Shaffer et al., 2006), rather than selecting the best qualified candidate for the position (Selmer, 2001). Research has also found that many firms employed an ad hoc and unsystematic approach to expatriate recruitment, thus not providing the expatriate with essential information and support (Santos & Looseman, 2013). Simply choosing the person who was willing to go, or selecting the individual on their technical expertise alone, was insufficient, as it did not take into consideration the complex cultural differences they would be encountering. Inadequate selection criteria were often cited as a reason for expatriate failure, revealing that the emphasis on technical and managerial expertise might be insufficient to the requirements of working abroad (Stone, 1991; Tung, 1982).

Taking a foreign assignment was a personal and professional risk for the individual, and the psychological contract held with the organization must provide the necessary credibility for the individual to feel secure enough to take that risk (Halsberger & Brewster, 2009). There were assumptions, by some organizations, that an individual who was high functioning in the home office would be able to transfer overseas and continue to be successful, and that cross-cultural training was not necessary. However, Caligiuri, Phillips, Lazarova, Tarique, and Bürgi (2001) found that a cross-cultural training program tailored to the host country and managing expatriate expectations facilitated the cross-cultural adjustment.

Global human resource factors. This increasing globalization of business has required a more international approach by human resource departments (Puck et al.,

2008). For example, the international construction industry is growing dramatically in China, India, and Africa, and is expected to increase from the 2012 level of \$7.5 trillion to \$12.7 trillion by 2025, according to the *Global Construction 2025* report (Santoso & Loosemore, 2013). The construction sector has historically demonstrated a lack of coherent HR strategies for hiring and managing expatriate managers in the overseas environment. This approach has resulted in high turnover rates and failed projects thereby causing financial loss, damaged reputations and loss of future business opportunities (Santoso & Loosemore, 2013).

These results underscored that the actual practice of preparing expatriate managers for an overseas assignment has been inconsistent with what the international human resource management (IHRM) literature states is necessary to function effectively in an overseas work environment (Santoso & Loosemore, 2013). Studies on international human resource management practices have shown that European based organizations have been more successful with their overseas assignments than the American organizations due to more extensive training and support for expatriates (Aycan, 1997). Therefore, it would be useful to determine selection criteria for differing types of professionals, and training and support appropriate for each group (Santoso & Loosemore, 2013).

Role ambiguity. By using realistic recruitment strategies, which consider job characteristics, the organizational culture, and the host country culture, there is a better chance of appropriate expatriate selection and success in the foreign environment. Role ambiguity in the workplace also makes adjustment difficult for the expatriate, which

spills over into their general adjustment, and then into the relationship with the spouse, affecting their adjustment as well (Fenner & Selmer, 2008; Takeuchi, Yun, & Tesluk, 2002). Realistic previews of a job should tend to eliminate individuals who have needs that are incompatible with the demands of the job and culture (Gardner, Reithel, Coglisier, Walumbwa, & Foley, 2012).

A study by Black (1988) focused on the work role transitions of the expatriate. Although the degree of adjustment was subjective and objective, this study used only the subjective, self-reported responses, as objective measures (from managers.) Three facets of adjustment were studied: work roles, interactions with host country nationals, and everyday life interactions. The eleven-item questionnaire utilized a factor analysis of a seven-point scale. A five-point Likert scale was used to determine the knowledge they held on the Japanese culture, language, customs, and other relevant items before the assignment. The Likert scale assessment was used to determine family adjustment to daily life. One hundred ninety-five (195) questionnaires were sent to American managers in Japan. Seventy-seven (77) were returned, resulting in a 40% response rate. The results of the study supported the theory of two distinct types of adjustment: work adjustment, related to role ambiguity and discretion, and general adjustment, related to pre-departure knowledge, family adjustment, and interaction with host nationals (Black, 1988). Although previous overseas work experience and role discretion facilitated work adjustment, these variables had no significant impact on general adjustment (Black, 1988).

On the other hand, pre-departure training had a surprisingly negative impact on work adjustment, although it had a positive impact on general adjustment (Black, 1988). The lack of knowledge may allow the worker to ignore the cultural differences in the workplace and focus on the similarities of the tasks with those of the home organization, whereas the worker with some pre-departure knowledge would be aware of the cultural differences in the workplace (Black, 1988). Black (1988) speculated that these findings may signal that the pre-departure training may not have been entirely accurate relative to working conditions; and that the content of the pre-departure training needed to be further analyzed (Black, 1988). In any event, these findings supported the contention that training elements for all phases of the CAE process were important.

Individual Factors of Expatriates

Living in a foreign culture requires an individual to conform enough to the local customs and morals to function effectively, which creates psychological demands on the individual to evaluate their core beliefs and the extent to which they can adopt the cultural values of the host country (Cerdin & Dubouloy, 2004). This impact of cross-cultural experiences for expatriates has been conceptualized as culture shock (Oberg, 1960). Oberg defined culture shock as “anxiety that results from losing all of our familiar signs and symbols of social intercourse.” (p. 177) Culture shock has also been defined as a state of anxiety and disorientation caused by exposure to a new culture (Santoso & Loosemore, 2013) that result from losing familiar signs and symbols of social intercourse. Coping may manifest in emotion-focused strategies. Coping responses

associated with this regulation of emotion may include withdrawal, avoidant, escapist, or palliative behavior (Cerdin & Dubouloy, 2004; Folkman, Tedlie, & Moskowitz, 2004).

As expressed by Osland and Osland (2005), culture shock creates a paradox in which “contradictory, mutually exclusive elements ... operate equally at the same time.” (p. 92). However, the expatriate experienced these contradictions and adjusted to them affected their overall adjustment and potential success or failure in the new environment.

Facial expressions and other non-verbal cues can be culture specific and add to the expatriate’s confusion. Both job satisfaction and life satisfaction were linked to cross-cultural adjustment (Cao et al., 2013; Cao, Hirschi, & Deller, 2014). This meant expatriate failure may have many different causes ranging from unsatisfactory work conditions, failure to adjust to the new culture, and even family failure to adjust (Cole & Nesbeth, 2014).

The difficulties of understanding expatriate adjustment factors have presented challenges in forming conclusions. While a meta analysis by Hechanova et al. (2003) illustrated the complex and diverse factors of the expatriate adjustment process it also highlighted the variety of difficulties, and these researchers stressed the “importance of factors such as interpersonal skills, self-efficacy, role discretion, role ambiguity, role conflict, frequency of interaction with host nationals, culture novelty, and family adjustment for the development of expatriate adjustment.” (p. 230) In a multi-dimensional study, Shaffer et al. (2006) found that the selection process for expatriates should include consideration of the personality traits that would enable the individual to

better adjust in the foreign environment: emotional stability, openness to experience, and outgoing personalities are among these traits.

Spousal adjustment factors. Moreover, some studies find that the two main reasons for failure in an overseas assignment were the failure to adjust by the expatriate and the expatriate's spouse (Caligiuri et al., 1998). A common and significant factor that affected expatriate adjustment was the presence or absence of the spouse, and, if present, how the spouse was adjusting to the foreign environment (Takeuchi et al., 2005). In fact, dissatisfaction of the spouse in the assignment was one of the most significant factors for early returns (Van Erp, Giebels, Van Der Zee, & Van Dujin, 2011). For families with dual careers, insufficient expatriate compensation as well as poor repatriation practices diminished the incentive for individuals to work overseas (Selmer, 2001), especially if one spouse was unable to work due to host country laws and regulations. The foreign assignment was seen as a disruption to the family, and the spouse needed support throughout the assignment in the adjustment process, as well as the expatriate (Caligiuri et al., 1998).

Some contributing factors for spousal dissatisfaction were the lack of a social network provided by the workplace, the increased financial dependency; and the lack of status by the spouse, which place increased pressure on the marital relationship. These factors could cause conflict that led to early return or poor performance by the expatriate (Van Erp et al., 2011). By reframing the expatriate assignment into family relocations, thereby emphasizing the importance of the family unit in the adjustment experience, and by providing support systems for the spouse, family adjustment and expatriate success

could be improved (Van Erp et al., 2011). Some 70% of expatriates took their family on the overseas assignment, and the adjustment of the children played a significant part in the overall success of the expatriate in completing their assignment (Van der Zee, Ali, & Haaksma, 2007).

Focusing on China as a location, Clouse & Watkins (2009) summarized the problems a family moving overseas could encounter due to lack of sufficient knowledge and preparation: cultural gaffes at the office, language barriers, spousal isolation, lack of local support, misunderstanding of local business practices and hierarchy. They suggest the executive prepare himself before going by gaining knowledge, setting up local connections for cultural cues, family preparation in advance, establishing an expatriate group support, and acknowledging local practices before criticizing them. Clouse and Watkins (2009) did not emphasize the importance of cross-cultural training by the organization. However, the crossover effects of adjustment between expatriate and spouse suggested that both parties needed to participate in pre-departure training and be provided with in-country on-site training and logistical support to facilitate their successful adjustment and performance (Takeuchi et al., 2002).

In a study of American expatriate spouses in Germany, Mohr and Klein (2004) used a mixed-methods research design to allow for new variables and concepts to emerge. The researchers also used partially structured interviews in order to create some comparability between participants and utilized discussion groups for the spouses to share their experiences with one another. This process was followed up with questionnaires based on the results from the qualitative data. The results expanded

previous studies by Black and Gregersen (1991a) who presented the idea of the two-dimensions of change--general living adjustment and interaction adjustment. Mohr and Klein (2004) expanded these findings by adding the third dimension of role adjustment.

Along with the role change experienced by the spouse, for example, not working, Mohr and Klein (2004) generally found the language difference to be one of the major difficulties as the spouse had to function in the local environment and performed everyday tasks. The idea of the spouse's openness and positive attitude toward the overseas assignment was also revealed through the interview process (Mohr & Klein, 2004). Caligiuri (2000) has already presented this correlation between openness and positive adjustment; thus, these two approaches support one another.

Another qualitative study based on grounded theory was conducted on Indian spouses who had accompanied their husbands on an overseas assignment (Gupta, Banerjee, & Gaur, 2012). India is a traditional patriarchal society and it was not surprising that the spouses placed their husband's career more important than their own when the assignment was long-term (Gupta et al., 2012). Most of these spouses did not receive predeparture training and this lack of preparedness made their adjustment more difficult. Those with more extroverted personalities were able to make social contact more easily, which facilitated their adjustment (Gupta et al., 2012). The expatriates that did not complete their assignment were motivated to return to India due to lack of adjustment of their spouses (Gupta et al., 2012), highlighting the importance of spousal training and support.

Personality traits. More recently the concepts of the relevant personality traits and other competencies and qualities have been studied. Personality traits have been considered as predictors in the successful expatriate assignment (Black, 1990; Church, 1982; Mendenhall & Oddou, 1985). Personality traits such as open mindedness, social skills, and self-confidence with the ability to handle stress were associated with successful managers (Oddou, 1991). Johnson, Kristof-Brown, Van Vianen, De Pater, & Rigsby (2002) considered the influence of personality traits, such as extraversion (how a person feels about others) and the core self-evaluation (CSE), (how a person feels about himself), on the development of social ties in the foreign environment. The CSE includes the traits of self-esteem, self-efficacy, locus of control, and emotional stability (Johnson et al., 2002).

Person-environment fit. Person-environment (PE) fit includes several elements: the job (PJ), the group, the organization (PO), and the vocation, (Makraiova et al., 2013). The expatriate experience includes the added factor of person-culture. Berry proposed adjustment as a change in the individual towards a better fit between the environmental demands and the individual's attitude and behavior (Aycan, 1997, p. 436). In expatriation, the fit is between the individual and the host environment and the workplace demands, leading to reduced stress and increased functioning (Aycan, 1997, p. 436).

In addition, the concept of Person-Organization fit (P-O) can be expanded into the cross-cultural context, as in Person-Culture (P-C) fit (Parkes et al., 2001). A person who has a similar personality (such as extraversion) to the culture will experience a higher level of individual adjustment and self-esteem than one who does not (Sussman, 2011).

Factors such as cultural distance defined as “an individual's perception of differences between their own background and experiences in their host country” (Parkes et al., 2001, Para. 8), and values differences, can create adjustment challenges in expatriates.

According to Schneider, (2001), the person-environment fit research has been focused on the Western view of the importance of the individual, requiring the consideration of national culture as well. The work of Chuang, Hsu, Wang, and Judge, (2015) expanded this primarily Western view by using a qualitative approach to study PE fit in a Chinese cultural context. Herrmann and Werbel (2007) defined person-national culture fit as “the degree of an employee’s compatibility with either parent- or host-country business practices” (p. 282). “...expatriate employees would have person-national culture fit if their attributes are compatible with business etiquette in the host country” (p. 282-3). Finally, it is suggested that the factor of gender may also play a role in the expatriate’s success or failure, depending on the fit between the person and the culture, and the expectations of both to the role, especially of women, in the culture (Olsen & Martins, 2009).

Ethnocentrism. Expatriates’ work attitudes and consequent adjustment were influenced by their perceptions of the host nationals’ ethnocentrism, which could create feelings of being discriminated against in the workplace (Florkowski & Fogel, 1999). In this case, the expatriates and the parent organization do not hold primary responsibility for the expatriate’s failure to perform effectively in the host environment, rather, it may be a result of the host national’s attitudes and behaviors which impede performance by the expatriate (Florkowski & Fogel, 1999, p. 798). The relationships of the host country

nationals were an important factor in considering the experience of the expatriate in the workplace (Olsen & Martins, 2009) with a view to social identity theory, which holds that individual's sense of self is influenced by their social groups (Carter, 2013).

In the study of the effects of host nationals' ethnocentrism on the expatriate adjustment process, the results showed that it is a significant factor (Florkowski & Fogel, 1999). The recommendation was that the host country office and nationals needed more training explaining the expatriate's position and the overall mission.

Questionnaires were sent to 22 multi-national firms, 250 returned with a response rate of 37%. A seven-point Likert scale was used to scale the expatriates' response to perceived ethnocentrism (Florkowski & Fogel, 1999, p. 786-7). Although this study presented the degree of perceived ethnocentrism of the respondents, it was not able to provide critical incidents reflecting the substance of the host country ethnocentrism, which could have provided more insight into the phenomenon itself and means to address it in the future. Narrative inquiry would have been useful for these critical incidents. Critical incidents may illustrate culture specific attitudes that could to be addressed.

Social Support System Factors

Having a social network was a fundamental factor in adjustment to a new culture. As individuals leave their support networks and move into a foreign environment, they may develop a social network with other expatriates, with whom they have similar adjustment experiences to share. Expatriate support was also seen as a factor in expatriate adjustment and the willingness of individuals to accept the assignment in the first place (Selmer, 2001). They may also create a social support system with host

country nationals (HCN). (Johnson et al., 2002). Further, the establishment of a social network between the expatriate and the host country nationals can facilitate the learning and performance of appropriate behaviors in the workplace (Osman-Gani & Rockstuhl, 2008). This successful performance of culturally accepted behaviors facilitated the expatriate's adjustment and performance in the workplace (Osman-Gani & Rockstuhl, 2008).

Three types of expatriate adjustment: general activities, work activities, and interactions with host country nationals (HCN) have been identified by Black (1988), leading to further studies focusing on the role of social relationships and social support in overall adjustment (Johnson et al., 2002).

The factors of age, reflecting maturity, the presence of a supportive spouse, and gender of the expatriate also influence successful adjustment (Selmer, 2001). McGinley's (2008) studied participants in an expatriate community in Russia who were obtained by email solicitations to 335 individuals in 130 businesses. There were 110 responses with a rate of 23.7%. A 36-item questionnaire with a seven-point scale was used for general adjustment. Other categories were: social resources (frequency of contact), social support (Ong and Ward's [2005] 18-item index of Sojourner Social Support), language ability (using a Likert scale for fluency), and experience (how much time abroad) (McGinley, 2008).

Several significant results were found between general adjustment and several predictor variables (McGinley, 2008, p. 61). Results showed that there was significant negative correlation of discrimination between expatriates and frequency of contact with

other expatriates (McGinley, 2008, p. 64). The explanation for this was not discernible in the data. An interview process, focusing on specific interactions and exchanges between expatriates who experience a negative response from other expatriates may shed some light on these phenomena. This is important as the expatriate community can provide a source of support for its members.

A final factor in social support systems was the value these systems created among fellow employees in the MNC. One theory of expatriate adjustment to the job and organization (PJ and PO) was through the development of social capital between the expatriate and their supervisor and group (PS and PG) (Lee et al., 2010).

Cross-cultural training. A major element of some organizational programs for expatriate readiness is cross-cultural training. Cross cultural training was defined by Landis and Brislin (1983) as “those educative processes that are designed to promote intercultural learning, by which we mean the acquisition of behavioral, cognitive and affective competencies associated with effective interaction across cultures” (Morris & Robie, 2001, p. 115).

Cross-cultural training (CCT) can be defined as any kind of intervention, which increases knowledge and skills of individuals, to allow them to function effectively in an overseas assignment as an expatriate (Caligiuri et al., 2001). Cross-cultural training has three basic objectives: To inform the expatriate on culturally appropriate behaviors and job responsibilities in the host country, to help the expatriate cope with unexpected situations, and to establish accurate expectations for the expatriate regarding living in the host country (Caligiuri et al., 2001). This training increases cultural sensitivity to allow

the expatriate to respond to new experiences, and to provide the expatriate with realistic expectations of their new assignment to facilitate success (Caligiuri et al., 2001).

A cross-cultural training (CCT) program, which creates realistic expectations for the expatriate, is one factor that facilitates cross-cultural adjustment and, in turn, a successful, completed overseas assignment (Caligiuri et al., 2001). According to this approach, it is not simply the cross-cultural experience but the met expectations that facilitate the expatriate's adjustment (Caligiuri et al., 2001). The theory of met expectations is "that the more congruent an individual's expectations are with the individual's reality once on the job, the greater the individual's satisfaction and adjustment" according to Porter and Steers, who were the first to apply this theory to the organizational context in 1973, (Caligiuri et al., 2001, p. 359). This theory, if accurate, would inform the cross-cultural training, not only in substance, but also in the fact that there is a cross-cultural training at all, which may be an expectation of the expatriate. By making the training relevant to the job requirements and cultural context, it would facilitate expatriate adjustment.

Providing the individual with preparatory training before sending them to a foreign environment in which their customary ways of thinking and behaving will be inappropriate would enable them to better function in the environment. Although one cannot observe a culture from the outside as thoroughly as one would while in the middle of it, there are various ways to create simulations to serve this purpose.

Simulation games in which participants are taken out of their comfort zone and are required to interact and behave in new ways serves the purpose of raising their

awareness about their habits and perceptions (Hofstede & Pedersen, 1999). There are numerous games available for this purpose (Fowler & Pusch, 2010; de Jong & Warmelink, 2017). Watching films which show foreign nationals behaving in everyday situations provide visual information that can be studied and analyzed in debrief sessions. This also raises awareness and gives an opportunity for insight into the particular culture under observation. Watching dramatic films that represent the culture under study will present the people in social interaction, wearing clothing appropriate to the action, moving their bodies in a natural way to their culture, and speaking the language.

Role-playing can give the individuals an opportunity to physically act out a behavior under consideration. For example, different cultures shake hands differently. The act of practicing shaking hands a different way will bring into awareness this simple, and generally automatic, action, preparing the individual to be aware of the difference and to not behave in an automatic manner.

Cross-cultural training (CCT) like this has been used, with varying levels of complexity, by many different organizations and the degree of success has not been consistently established by studies in the field (Puck et al., 2008). For that reason, there are still many multinational companies (MNC's) that do not provide cross-cultural training although CCT in organizations has increased from 32 percent in the early 1980's to 70 percent in 1998. Need more recent data.

In addition, many CCT programs are not scientifically based, but are narrow and anecdotal, which limits their generalizability (Caligiuri et al., 2001). Other problems with many current CCT programs is that there is no theoretical grounding, the research on

expatriate adjustment is not done on corporate expatriates but rather on students and Peace Corps volunteers, groups with very different experiences than the corporate environment (Caligiuri et al., 2001, 359).

Cross-cultural training (CCT) comes in various sizes and levels of complexity relative to the elements of both content and methodology (Puck et al., 2008). Many CCT programs include language study, which has been found to be an important element in facilitating expatriate adjustment (Puck et al., 2008).

Cross-cultural training is widely believed to be an important element in expatriate preparation, however its effectiveness is difficult to determine for various reasons such as lack of data, the variety of training methods within and between different organizations, and the impact of the training on the individuals involved (Morris & Robie, 2003).

Cultural intelligence. CCT generally has been culture specifically focused, which has obvious limitations. In today's increasingly interconnected global marketplace, MNC's are asking their managers to move from one foreign assignment to another, making the focus of cross-cultural training problematic (Earley & Peterson, 2004). The international manager, working across cultures with multinational diverse teams, needs a skill that is envisioned by Earley & Peterson (2004) as cultural intelligence (CQ). Cultural Intelligence (CQ) "consists of three fundamental elements: metacognition and cognition (thinking, learning, and strategizing); motivation (efficacy and confidence, persistence, value congruence and affect for the new culture); and behavior (social mimicry, and behavioral repertoire)" (Earley & Peterson, 2004, p. 110). The CQ approach focuses on the individual's strengths and weaknesses, developing

learning skills, and includes a model of cultural adaptation to promote flexibility, rather than simply country specific training (Earley & Peterson, 2004, p. 101).

Traditional cross-cultural training (CCT) has focused on country specific information through a variety of methodologies. This has its appropriate uses. However, with the movement of managers to many countries, the need for more adaptable skills has inspired the concept of Cultural Intelligence (CQ) and provides another model for cultural adaptation (Earley & Peterson, 2004).

Yamazaki and Kayes (2004) have also developed a taxonomy of skills necessary for cross-cultural learning. Based on Kolb's experiential learning theory, the taxonomy determined how effectively an expatriate manager would learn from cross-cultural experiences. More recently research has employed experiential learning theory to analyze the development of cultural intelligence (Santoso & Looseman, 2013).

Organizational Support through the Cycle: Repatriation

Research showed that support for expatriate managers must also extend to administrative issues traditionally associated with the human resource management function. In particular, Evans et al. (2011), argued that it was important that expatriates feel there is 'consistency' in the way they are treated while overseas (Santoso & Looseman, 2013).

Research also showed that the adjustment process was influenced by both the characteristics of the expatriate and the organizational support structure (Aycan, 1997). The support by the organization is particularly relevant during the repatriation process. Santoso and Looseman (2013) argued that the aim of repatriation should be to give time

for returning expatriate employees to readjust to home (often the culture shock of returning home was worse than the shock of arriving in a new country); to ensure the home business captured and disseminated the experiences of returning overseas managers; to clarify the return on investment from the program; and to ensure continued development and career progression of expatriates on return. These goals were best achieved by developing a repatriation plan in advance of return to enable effective reintegration into the home business (Santoso & Looseman. 2013). This plan should include a career plan for at least three years after arrival; mechanisms to monitor progress after arrival home and opportunities to utilize acquired knowledge and disseminate this to the rest of the business (Santoso & Looseman. 2013).

Further complicating the cross-cultural adjustment experience of the expatriate was the fact that a home organizational culture may have specific attributes, but the organization's branches abroad may be quite different as organizations are influenced by their surrounding environment (Parkes et al., 2001). Thus, national values influenced the organizational culture, providing the expatriate with another element to which they must adjust.

Methodology

The role and process of the expatriate has been studied using a variety of approaches and research designs. Due to the very nature of being an expatriate, most research subjects are located in multiple geographic venues and research is conducted either during a direct posting or shortly upon return. This means that researchers must be creative and focused in their approach to collecting data on this unique group of

individuals. This review of prior empirical studies revealed that methods to collect data have included quantitative, mixed-methods, as well as face-to-face and web-based research designs.

For example, a web-based survey hosted by the Expatica website (www.expatica.com), an online English-language news and information source for expatriates living, working in or moving to the Netherlands, Germany, France, Belgium or Spain provided an appropriate mechanism to engage both CAE and self-initiated expatriates in a study by Doherty, Dickmann, and Mills (2011). The population was limited to those with access to the Internet; and who self-selected to participate through the Expatica website. Although there were limitations, such as the impossibility of determining an accurate response rate, it was a cost-effective method of gathering information from a wider group than previous research (Doherty et al., 2011).

Beyond quantitative measurement, valuable data for the field of expatriate adjustment can be gained from the expatriate's themselves, through their diaries and interviews. An example of this is found in an analysis of an auto-ethnography of a Canadian woman who provides rich insight into her experience during her time in Hong Kong (Friedman, Dyke, & Murphy, 2009). She supplied detailed anecdotes by her recollection of representative situations. To avoid contaminating her memory and experience, the author collected her notes and wrote her auto-ethnography prior to the literature review on the subject of expatriate adjustment (Friedman et al., 2009).

For background, it was stated that she had previous international experience, albeit short term assignments, a high motivation to work longer term, excellent

professional skills, language skills, knowledge of the culture of Hong Kong, and a plan for emotional control, all factors which would contribute to her successful experience. Nevertheless, with all the preparation one could imagine, the foreign assignment presented unforeseen challenges and stressors (Friedman et al., 2009). Her seven vignettes in the article furnished real insight into her experience and the behavior of her colleagues, bringing to life the subtlety and complexity of a foreign culture.

This study was provided as an example of the type of data that the researcher sought to collect in this proposed study. In contrast to quantitative studies focusing on specific factors of the expatriate experience, the narrative approach to this experience provided rich insights and life lessons. For this researcher the stories were at once both hilarious and carried profound meaning.

Narrative Inquiry History

Narrative may be considered to be the original form of inquiry (Hendry, 2010). Deriving from *gno*, which means to know, narrative originated as various ways of knowing (Hendry, 2010). For the Greeks, the two kinds of knowledge, *episteme* (logical-rational thought), and *gnosis* (mytho-poetic), were complementary ways of knowing, not opposites (Hendry, 2010, p. 72).

Narrative Inquiry has been used by various disciplines for different purposes (Chase, 2005). Since the earliest days of psychology qualitative inquiry has played a part in the discipline and, although falling out of favor in the first half of the 20th century, it has re-emerged as a popular methodology in psychology and the social sciences (Demuth, 2015). Anthropology used the life history narrative in the early 20th century to

tell stories of Indian cultures, to understand cultural facts, daily life, and to study cultural change (Chase, 2005). Anthropological studies presented a narrative ethnography in which the interviewer was located for a long time in one community or culture and focused on one individual or small group. Edward T. Hall spent extended periods of time in the 1930's living with the Hopi and Navajo Indians. He wrote about how the seasons and the weather influenced the relationship to time, and that riding a horse created a different rhythm than riding an auto on a highway (Hall, 1983). *The Silent Language* (Hall, 1959) also provided several stories about the difference between the American approach to time and the Navajo, differences. The Americans establish a start time for an event; the Navajo started "when 'things are ready'" (Hall, 1959; p. 22).

Other early works in the modern era of narrative inquiry came out of the Chicago School by sociologists in the 1920's and 1930's with *The Polish Peasant* being cited as the first significant life history (Chase, 2005). The sociologists, Thomas and Znaniecki, were interested in illustrating the interaction between the individual and his environment (Chase, 2005). They believed that "personal life records...constitute the perfect type of sociological material" (Chase, 2005, p. 653). Sociologists were interested in explaining the interaction between the individual and the sociocultural environment. However, in the 1940's and 1950's sociology, as a field, focused on the abstract, moving away from the life history and towards statistical methods (Chase, 2005).

In the 1960's and 1970's—with the civil rights movement in full play--the life history approach emerged to study slave narratives. Material that had been collected in the 1930's through the Federal Writer's Project was in the Library of Congress and was

reviewed again and published by Rawick (1972) in 18 volumes as *The American Slave: A composite biography* (Chase, 2005). At the same time the women's movement reinvigorated the personal narrative through the desire to learn the subjective meaning that women gave to the details in their own lives (Chase, 2005). In these narratives women were seen as primary actors in their own lives, giving meaning to the events in their lives (Chase, 2005).

Sociolinguistics, the intersection of language and life stories, brought collaboration among the social sciences. The idea that even ordinary people's narratives were worthy of study was presented in a 1967 article, "Narrative Analysis: Oral versions of Personal Experience" by Labov and Waletzky (Chase, 2005, p. 655). This article was reprinted in 1997 with 47 assessments on how the article had influenced narrative inquiry through their analysis of sociolinguistic narrative: Orientation (who, when, where and what), Complication (what happened), Evaluation (the premise), Resolution (result), and Coda (return to the present time) (Chase, 2005).

During this fruitful period, many minority groups discouraged interpretations of narratives that could affect the narrator's authentic voice; rather, they preferred presenting the unique experience of the individual as they are (Gergen & Gergen, 2010). In fact, in 1967 an article entitled "Narrative Analysis: Oral Versions of Personal Experience" was considered groundbreaking in presenting the idea that ordinary people's lives, in themselves, were worthy of study (Chase, 2005, p. 655).

More recent decades in psychology have tended toward the biological and neurological (Gergen & Gergen, 2010). Social science became more differentiated as

new statistical methods superseded fieldwork in psychology, although field research remained central in anthropology and still maintained a presence in the Chicago School tradition (Locke, 2011). This decline in interest in qualitative research in psychology led to a lack of qualitative research methods courses for college students, and fewer mentors and apprenticeship opportunities (Locke, 2011).

The resurgence of interest in narrative serves many purposes. Stories have the benefit of making the world events understandable, and narratives have the ability to cross-disciplinary boundaries. This is especially true in the linking of psychology, sociology, and cultural studies (Gergen & Gergen, 2010), areas of scholarly study which touch on this research project.

Summary

A variety of themes and topics accompany the transitional process of the CAE. So far, this research project has examined culture, proxemics in culture, language, time, global human resource factors, organizational factors, individual, and spousal family issues as factors in the success or failure of the expatriate experience. In addition, we have focused on the working and social support structures of the expatriate. Not only are there organizational based themes of support in training (or the lack thereof), but also personal support issues such as spousal transition and the expatriate's social network that are predominant aspects of the experience.

The chapter also explored the background to methodologies and research approaches that have been used to research this area, as well as reviewing examples

concerning the researcher's chosen approach of narrative inquiry as the qualitative methodology used to conduct this proposed research project.

Chapter 3: Research Method

Introduction

The use of expatriate employees to fill an organizational requirement is increasing with the continued global expansion of business. In this study I have explored various aspects of the expatriate experience to define the constructs involved in the selection, possible training (or not), adjustment, and repatriation process that exemplifies the overall experience. The individuals who were the proposed participants for this study have been identified as CAEs (Cao et al., 2013, p. 57). Factors involved in the success or failure of the CAEs are multifaceted. While the prior chapter identified various constructs such as culture, proxemics, language, global HR, organizational, individual, spousal and family issues as factors in the success or failure of the expatriate experience, the individual aspects of the expatriate experience are still under study, and there is much that still seems to be unclear about the process as a whole.

Therefore, the purpose of this study was to further investigate the CAEs personal story of adjustment, transition and repatriation experience as a complete process by applying the qualitative methodology of narrative inquiry. This narrative approach was used to uncover additional factors, not easily attainable in quantitative studies, that may be relevant in supporting a successful expatriate experience.

Statement of the Problem

Competition in international organizations has increased the need to assign and to send employees on foreign assignments. This need requires a better understanding of the process and elements that facilitate a successful overseas assignment (Takeuchi et al.,

2005). Despite extensive research in this area for the past 50 years starting with Oberg's classic study in 1960, the expatriate experience has, in many cases, resulted in a negative experience, caused by a wide variety of both organizational and personal factors (Hippler et al., 2014). As discussed in the prior chapter, numerous factors are involved, and few studies have explored the entire transition process in the expatriate experience. In addition, there is no consensus on how to structure a cross-cultural training program to guarantee success. Therefore, there is still much that is not known about the overall adjustment, transition and repatriation process and experience of the CAE.

Research Methodology: Qualitative

The study resides in the interpretive paradigm (Burrell & Morgan, 1979), and the researcher used a qualitative approach to the collection of data. As an interpretive process; there is no objective truth, since meaning is subjective and socially constructed (Berger & Luckmann, 1966). Qualitative research allows for flexibility during the process, allowing the research to follow the narrative and adjust to new developments as they emerge (Locke, 2011). Hippler et al. (2014) developed a new measure of expatriate adjustment composed of 35 items derived from an "empirically grounded item pool", which was a result of "a large scale qualitative effort" (p. 1952) thereby illustrating the value of qualitative studies to contribute to further investigations and analysis.

Research Design: Narrative Inquiry

Narratives are meaning making activities. Narrative inquiry is both the research method and the phenomena that is studied (Caine, Estefan, & Clandinin, 2013). Narrative researchers seek to discover the construction of a narrative, and its cultural

influences (Tahar, 2009). Narrative analysis is also particularly suitable for documentation of the life course (Saldana, 2009, 2016).

Narrative methodology aligns with constructivist philosophy (Creswell, 2003, 2007; Leavy, 2017). Individuals construct meaning from their experiences through the stories they tell. This is a postmodern perspective which posits there is not one unified truth but rather multiple, complex truths (Walden, nd.). Chase (2005) stated narrative researchers treat narratives as socially situated performances, a social interaction “produced in this particular setting, for this particular audience, for these particular purposes” (p. 657). Moreover, although narratives are no longer understood to be simply referring directly to the events they describe, they are considered to construct the events through the language they use (Chase, 2005, p. 656).

Narrative inquiry uses in-depth interviews as the primary data source; it may focus on the manner in which the individual tells the story and the details in the story itself. Narrative covers various components, it can be written, oral, an interview, a short or long-life story, even derived from diaries, journals and letters (Chase, 2005). In-depth interviews are the most common type of data collection. Moreover, it is the meaning participants give the stories that is of primary interest (Walden, n.d.) The action of being able to collect authentic experiences, values, and attitudes in the actual life environment, provides ecological validity for this study (Ye, Ollington, & DeSalas, 2016).

According to Chase (2005), there were various approaches in contemporary narrative inquiry. The psychological approach focuses on the content of the life story that expresses the person’s identity, and changes over time. The sociological focuses on

the identity a person creates within organizational and local cultural contexts. Examples of this type are found in self-help groups, prisons, and talk shows. The emphasis here is on how the organizational structure forms the self. Another sociological approach focuses on a specific aspect of a person's life rather than the organizational context; it shows how a person's narrative strategies change depending on their context.

At the center of narrative inquiry is ambiguity, by being open to realizations through asking questions outside the bounds of convention. This provides the opportunity for discovering the ways humans make meaning, and the way we experience being in the world (Hendry, 2010). Whether a narrative is universally representative, or typical of a particular group at a particular time, is not the only value they offer. The facts in a narrative also demonstrate what is possible and what makes sense in a particular social-cultural context (Chase, 2005).

Further, narrative is not simply a method, but a way of meaning making that includes the physical, the human experience, and the metaphysical. These are not separate and distinct, but overlap and interrelate (Hendry, 2010). It is a way to understand a person's lived experience (Caine, Estefan, & Clandinin, 2013).

Questions in a narrative interview are constructed in a way to generate a story, such as "Can you describe your experience at that time?" or "What lessons did you learn from your experience?" (Scarneci-Domnisoru, 2013, p. 24). The quality of the questions is paramount to providing a context for the subject to respond (Mishler, 1991).

Role of Researcher

The role of the researcher is to establish a trusting relationship with the narrator to empower the subjects to tell the story in their own words. The process of narrative inquiry is a collaborative venture between the researcher and participants (Saldana, 2009 2016). The stories people tell are the substance and empirical material that the researcher needs to understand how people create meaning in their lives (Chase, 2005). Through self-disclosure the researcher may develop a trusting relationship with the participant, building rapport and collaboration (Walden, nd.). In this process the researcher uses self-as-instrument in the use of active listening and facilitation techniques. The interviewer demonstrates interest in the subject through attentiveness, maintaining eye contact, and occasional comments and verbal cues such as “very interesting” (Scarneci-Domnisoru, 2013, p. 23). In this positioning of interviewer and participant narrators don’t have answers to the researcher’s questions; they have stories to tell. The narrative itself is shaped by the context and the listener; it is an interactive process (Chase, 2005).

Participant Description and Sample Selection

This study drew from a volunteer sample of American expatriates who met specific criteria for the study. These criteria required that the individual had worked with host nationals in the organization during their time abroad. Parameters for participants were that they be American-born natives at least 30 years old, both male and female, with English as their native language, who had worked abroad in a professional capacity for a minimum of one year. All participants had returned from their overseas assignment. This allowed the narrative to cover the entire experience from selection, pre-departure

preparation, overseas assignment, and repatriation. All of these returned expatriates had completed the process of repatriation, which provided the opportunity to collect stories about the expatriate experience as an entire process.

The categorization of a successful or failed assignment was defined by the expatriates themselves, or by the organization. That is, the expatriate could have considered their overseas experience a success because it was positive, but the organization might have considered it a failure because the expatriate did not complete the pre-determined tasks and time frame. On the other hand, the expatriate may have completed the assignment, being considered a success by the organization, but the expatriate may have had a negative experience that led them to feel like it was a failure. In this study, all the participants considered their experience a success.

All participants were volunteers. These volunteer participants were recruited by posting a notice about the study on social media sites, such as FaceBook, LinkedIn, encore.org, NextDoor.com, and by recruiting two individuals I knew who fit the parameters, meeting convenience sampling parameters.

Research Procedure

This study focused on collecting the stories of thirteen American-born natives who had lived abroad as expatriates in a professional capacity working for an international organization (CAE.) Participants were obtained through preliminary postings on social media sites. Once a potential participant responded to this posting on a social media site, the researcher continued the process by sending the Invitation to Participate notice, to provide more detailed information about the study. Following that,

the consent form was sent to the participant. Upon receiving a verbal agreement from the participant to continue, a meeting time and place was set. One of the participants was out of state, so the interview had to take place over the phone. He emailed the signed consent form to me; the interview was taped by an Internet service, and sent to my phone, from which it was downloaded into the computer.

The other participants were contacted by email, and then by telephone in a few cases, to set up the meeting time and place. Most of the interviews took place in meeting rooms at the San Francisco Public Library Main Branch. Four of the participants were interviewed in their private workspace due to time and space considerations. One of the interviews was with a couple, and the meeting rooms accommodate only two people.

None of the participants were coerced into joining the study, and it was made clear that he or she could withdraw at any time without any undue ramifications. In addition, all participant volunteers were assured of anonymity and confidentiality during the entire research process. Each participant chose their own alias for identification in the interviews and transcriptions; I alone know the true identity of each participant.

Using semi-structured interviews and open-ended questions allowed the participants to elaborate on their experiences; providing unanticipated information, as illustrated by Santoso and Looseman (2013). All the participants were interviewed only once, using questions based on the understanding of the expatriate experience developed through the literature review (Appendix A). Rather than meeting in person for a second interview, in the cases where there was ambiguity, or more information was required, the

researcher sent the participant an email with the questions and they responded in an email. In that way more text was provided to add to the interview transcript.

The interviews followed a semi-structured procedure asking open-ended questions, allowing the individuals to reflect on their experience and provide depth and detail. The open-ended questions accomplished two purposes: First, using a consistent set of questions allowed for comparison of story elements across participants. This increases reliability. Second, the open-ended questions served as prompts directing the participant to recall a time or a particular element in their expatriate experience. Asking about their first day in the country, or their first day at work, was broad enough that it elicited a variety of anecdotes that were not anticipated, adding more material to consider in support for the expatriate of the future.

The purpose of the interviews was to gain useful information regarding the expatriate adjustment process to inform further study; therefore, relevant topics were addressed. Allowing the participant to go off on tangents, telling stories provided more material for the narrative. That is, the questions served as prompts from which the individual could digress. For example, in a qualitative study of Indian spouses the participants were asked open-ended questions in order to discover their experience (Gupta et al., 2012). This study stressed the importance of asking questions that would allow the participant to reflect on their experience and guide the course of the interview (Gupta et al., 2012).

To prepare for the interviews the researcher conducted two practice interviews, taping and transcribing one. Both devices, the iPhone and the Philips recorder, were

tested. During the practice interviews the researcher made notes on what strategies were most effective in supporting the interviewee.

The use of a narrative inquiry through 50-90 minutes structured interviews was used to seek information on the expatriate's response to various elements of their experience: What affected them most; what was most difficult; what was a positive experience; and what advice they had for future expatriates.

Sources of Data

Data was collected from two sources: face-to-face recorded interviews, one telephone interview, and a field journal kept by the researcher. The primary source of data was collected by the narrative inquiry method using semi-structured individual interviews of the participants (King & Horrocks, 2010). The secondary source of data was the field research journal kept by the researcher during the process of recruitment, interviewing and transcription of the data, as well as analysis memos (King & Horrocks, 2010).

Data Collection

Participants were asked to participate in one main interview with a possible follow-up interview, if needed, for clarification of any issues or details. The interviews were audio taped face to face, using a cell phone and a small voice recorder for backup (King & Horrocks, 2010). Most of the interviews were held in meeting room at the San Francisco public library, three were in the participant's workspace; one was a telephone interview, according to their needs. Consistent questions were asked during the interview process to allow for comparison of issues across participants. The main interview

questions for comparison are in Appendix A. Follow up questions were along the lines of the following:

- Describe what happened then...
- Can you think of a specific example to illustrate that?
- When/how did it all start?
- Tell me the story of...

In addition to recording the interview, participants had the opportunity to bring along certain artifacts with them as memory aides, but they did not. The researcher kept a field journal to record impressions and notes for issues that arise during the overall data collection process (King & Horrocks, 2010). The interviews were taped and transcribed by the researcher. The text of the interviews was sent to the participants in a MS Word document and was reviewed and approved by the participants.

The data was collected and coded in an iterative process for analysis and evaluated for common themes.

Reliability

In qualitative methods, three main practices are used to ensure reliability of the data. These practices are the use of an interview protocol, triangulation, and member checking of the interview transcripts. The first is the use of an overarching protocol for the interview process along with the same set of questions asked of each participant (Creswell, 2003, 2007). These practices have all been met in this study: The interview protocol, triangulation, and member checking. The second practice, triangulation, was created through the collection of field notes and journals used by the researcher,

(Creswell, 2003, 2007). The last practice, member checking, was accomplished in follow-up contact with the participants as they reviewed the transcript (Creswell, 2003, 2007). This follow-up was also used by the researcher to ask clarifying questions, and for the participants to voluntarily offer more information.

Data Analysis

Narrative texts provide psychological as well as sociological contexts: relationships, local culture, jobs, and organizations, all influence the individual (Saldana, 2009, 2016). This is particularly relevant when considering the rich material provided by the expatriate experience. Another culture, organizational differences, job requirements, relationships with host nationals and other expatriates, all provide wide-ranging experiences for analysis.

There are various categories available as coding and sub-coding schemes for narrative coding including: type (cautionary tale), genre (tragedy), purpose (personal/historical), setting (locale), and plot (chronological) (Saldana, 2009, 2016). It was expected that any number of these categories could play a part in the expatriate narrative, depending on the individual's experience. It was also expected that dominant themes would emerge from the data and create an overall context for the experience. Joseph Campbell's (1949) seminal work: *The Hero with a Thousand Faces*, illustrated myths that can characterize the life paths and experiences of individuals. These myth structures could also be applicable to the expatriate experience.

Methods of Analysis and Coding

The descriptions of the techniques that follow were used in the analysis and coding of the data collected in this research project. Descriptive coding is appropriate for qualitative studies with a variety of data forms such as interview transcripts, field notes, and similar documents (Saldana, 2016). According to Saldana (2016), coding is a judgment call, a label on a datum to show its content and meaning, a method to organize data into similar groups. Coding began as soon as data was collected: writing up notes, transcribing interviews, writing down preliminary words for codes on the notes, and keeping analyses in a field journal (Saldana, 2016). Pre-coding was also used, after transcription, by underling text.

Everything was coded: who, what, when, where, and why. It was important to keep a codebook handy that contained codes with brief descriptions and data examples. Transcribing the interviews provided an opportunity to see themes and patterns emerging in the material. After the participants approved the transcripts, I went through the document underlining different categories of material with different colored pens. For example: organizational support was purple, advice was green, positive experiences were red, and repatriation was blue. Following the underlining, I created another document with all like material grouped together. For example, there were comments about organizational support occurring in different places in the transcript; collecting them in one place made it easier to analyze.

Coding well has certain requirements, (Saldana, 2016, p. 43). One must be organized and label everything, perseverance and patience are critical, it is important to

be flexible, creative, rigorously ethical, and have an extensive vocabulary. For this project, coding was an iterative process using several cycles. Each cycle refined and built meaning as the similarly coded data units created categories and patterns that began to emerge. Having a dictionary and thesaurus handy was necessary. The dictionary/thesaurus applications on the computer were extremely convenient, permitting quick access during editing and analyzing.

Saldana (2016) stated that most qualitative research methodologists agreed that whenever anything related to the coding or analysis of the data comes into mind, it is important to immediately write a memo about it. This included unanswered questions, ideas for more topics, and insightful connections. Writing analytic memos documented and reflected on the coding process and code choices provided clarity through the process. These memos suggested more codes and categories. Field notes were also important. They included the researcher's subjective responses to and interpretations of social action by the expatriates and helped to develop rich analysis from the field notes (Saldana, 2016).

Gupta et al. (2012) provided a clear analysis of the coding process for open-ended interviews. They began with open coding of the initial interview, keeping memos along the way describing the participant and the interview process, and after collecting the open codes they developed the axial codes, which collected the open codes into specific categories (Gupta et al., 2012, p. 22). In terms of structure, Saldana (2016) suggested a three-column system for the beginning manual coding session that was used in this project. The first column consisted of the raw text from the interview. The second

column contained the initial codes describing the raw data. The third column was the next iteration of codes refining the ideas and codes of the raw text. By using paper and pen and looking at the page(s) as a whole, I could see the big picture that is emerging.

Summary

This chapter detailed the methodology and the research design, as well as described the participants, the selection process, the data collection procedures and analysis for the proposed study. Ethical considerations have also been discussed. This research project provided an opportunity to deepen the body of research on the expatriate experience by collecting narrative accounts and viewing the selection, possible training, adjustment and repatriation experience as a holistic process worthy of its own research. In that respect, this study adds to the knowledge base about the expatriate experience and will assist those global organizations using expatriates in the future.

Chapter 4: Results

Introduction

This narrative inquiry study focused on the stories of expatriates who had returned to the United States after working abroad. The period of their time abroad ranged from six months (repeated over several years, an outlier), to one year, to over 20 years. The 14 participants were all Caucasians, 10 men, and four women. All participants were United States citizens. The demographics are in Table 1.

This chapter presents the material derived from the narratives of these participants about their experience as expatriates. The narrators discussed their work, adjustment to the foreign environment, personal insights and reflections, returning home, and advice for future expatriates. The participants also shared his or her impressions of the success or failure of the expatriate assignment, as well as difficulties experienced and positive impressions.

Settings

There was a total of 14 participants. Eight of the participants were interviewed in study rooms at the San Francisco main library. The rooms are soundproof, with a wall table and two chairs, allowing me to place my phone and recording device on the table near the participant. All of the participants were invited to come to the public library for the interviews. However, six of them had limitations of time and availability and requested that we meet at a location more convenient for them.

One of the interviews was conducted by telephone as the participant lived in another state. The call was recorded by a recording system and accessed following the

call. One interview was conducted in the participant's workspace due to scheduling constraints. Another interview was conducted in a schoolroom where the participant teaches. One interview took place in the church office where the participant is currently in service. The married couple was interviewed in their home for their convenience. The rooms at the San Francisco public library can accommodate only two people.

Demographics

The participants were all United States citizens, and members of the Caucasian ethnic group. There were ten males, and four females (including the married couple who participated). Their age at expatriation varied from the mid-twenties to the mid-forties.

At the time of their first expatriation, there were three in their 20's, two in their 30's, seven in their 40's, and two in their 50's. The age of the participants at the time of their interviews found one in his 30's, one in her 40's, three in their 50's, and 9 over 60. Five of the participants are now retired (including the married couple).

Their time abroad varied greatly, from 1.5 years in one assignment, to over 20 years over a series of multiple assignments and locations. Only three participants served in one country for a period of time. Another participant worked in only one country over an extended period of years off and on. Various postings ranged from Great Britain, Australia, Hong Kong, Israel and India, where they were able to speak English, to multiple locations in Europe, Africa and Asia where the language difference was generally mediated through a translator working for the company. There were two participants who learned the local language sufficiently to function in social situations speaking the language. The participants represented various professions. There were three

executive managers, two attorneys, one construction professional, two engineers, four teachers, one religious' representative, and one spouse.

Data Collection

The primary participant selection method used was criterion sampling, as each participant was required to have the requisite experience of an overseas assignment to be a part of the study. Two participants who met these criteria were already known to the researcher and therefore, met a convenience sampling. Participants were recruited through posting of the Initial Posting in various social media sites. These social media sites included: NextDoor.com, LinkedIn.com, Encorg.org, Facebook, and InterNations.org. Participants were also recruited from acquaintances I knew had worked abroad. Although two individuals were known prior to the commencement of this study, their relationship to the researcher was independent of any situation in which their cooperation could be coerced or influenced. That is, they did not work with or for the researcher. Therefore, the researcher found no reason to consider that the relationship would bias the data collection through prior knowledge or conversations. With one individual, there was no prior knowledge of the participant's previous experience as an expatriate. Upon learning of the subject of the research project, the participant revealed his status as a prior expatriate, thereby meeting the study criteria. This individual was then recruited following the standard procedures. Outside of arranging the time and place for the research interview, there was no further contact between the researcher and the participant after recruitment until the interview. The second participant was an acquaintance of a friend. This individual also met the criteria for the study. This

individual was asked directly about the possibility of participating in the study based on this knowledge, and once the participant indicated interest, the participant was recruited using the standard procedures. In both cases there was sufficient distance between the participant and the researcher to consider the data as unbiased by this relationship.

The overall participant recruiting process took place over a period of four months. Once an individual expressed interest in participating in the study, I sent them the Invitation to Participate, and the Consent Agreement to provide further details about the study.

The interviews spanned the period between the end of October 2017, until near the end of January 2018, with a cluster of interviews taking place in December 2017 and the middle of January, 2018. This time span allowed the researcher to begin reviewing and coding interviews following each transcription.

The individuals reviewed and signed a Consent Form and submitted it either prior to or at the time of the interview. At the time of the interview each participant chose a pseudonym to use, thereby masking their identity; this had two purposes. One was to ensure their confidentiality. Another was to provide a readable document by using names rather than Participant numbers. At the time of the interview, participants ranged in age from late 30's through late 60's, with experiences ranging from six months (every year) to 2 years, through four-and-a-half years, eight years, 20 years, and a lifetime of back and forth between two cultures as their life became connected with study of their new culture.

Data was collected through open-ended interview questions (Appendix A). The questions were designed as open ended and broad, allowing the participants to tell their

story, focusing on elements of their experience that were significant to them rather than being directed by the researcher (King & Horrocks, 2010). Some respondents were clear and concise in their answers; others gave longer answers with various tangents. In that way, various elements of their experience appeared in different places in the transcript. For example, they may have revealed experiences of their interactions with the culture in response to various questions. The first few interviews I followed the order of the questions. Later the interviews began with question two and ended with question one. During the interview process I found it was easier to get the participants into the dialogue by beginning with the second question, as the first one was too broad (some had difficulty answering it). Also, after a few interviews it became necessary to ask more clarifying questions to gain more detail about the topic, or to get the time sequence in order.

One interview was conducted by telephone and recorded through a recording service number, which provided a link to the recording. This recording was then downloaded and retained on the researcher's computer. Three individuals were interviewed in their workspace due to time constraints in one schedule, and personal preference in the other. Another individual was interviewed in a study room in the school at which she teaches. The other seven participants were interviewed in study rooms available at the San Francisco Main Public Library.

The face-to-face interviews were recorded on an Apple iPhone and a Philips recording device. The recordings have been downloaded from the iPhone, onto my laptop computer. The Philips recording device maintained the recordings, which were also downloaded onto the computer. Once this interview process was completed, these

recordings were downloaded to a computer flash drive and stored under lock and key in my home office. Pseudonyms were used for the interview recordings to ensure confidentiality and maintain anonymity.

I personally transcribed all the interviews. The transcriptions were emailed to the participants for their review and approval. All the interview transcriptions were reviewed and approved. Five had minor changes made by the participant for purposes of: clarity, spelling of a foreign city name, or masking of an organization's name to ensure anonymity. The transcriptions use the pseudonyms, continuing the condition of confidentiality. However, two of the participants used their real names when they signed and approved the document and returned it in an email. Data were considered collected once this process of member checking was finalized.

Data Analysis

Analysis of the data required several readings and coding iterations by the researcher (King & Horrocks, 2010). During the initial reading of the transcripts the researcher used colored pens to underline sections relating to different topics. These topics were drawn directly from the literature review and were the focus of specific interview questions: organizational support and activities, elements of the foreign culture and environment, language issues, household and living situations, career enhancement, overall impressions of the experience, reflections on success or failure, and advice to future expatriates. These emerged as the main topics presented for review in these narratives. The color-coding process enabled the researcher to later locate themes quickly throughout the reviewing of the different transcripts and facilitated further

analysis of the data (Saldana, 2009, 2016). This analytical process included summarizing the individual experiences of the participants, and then creating tables to examine the structures, similarities and differences of certain experiences (Saldana, 2009, 2016). These tables, presented below, addressed language training; cultural adjustment; organizational support issues such as housing; and cross-cultural training.

Issues of Trustworthiness

Quantitative studies have statistical analysis to provide validity. Narrative studies have transferability, dependability, and confirmability (Walden, nd.). Dependability and confirmability can be achieved by triangulation, which is, using multiple methods and sources to capture data. This study ensured validity through triangulation by the consistent use of field journals to capture researcher bias, ideas, connections, methodological notes, analysis memos, and pre-coding material (Chase, 2005, Creswell, 2003, 2007; Saldana, 2009, 2016; Walden nd). Initial coding commenced with transcription by the researcher. Member checking was used, that is, through the participants' review and approval of the transcripts. Data saturation was achieved by the collection of a sufficient amount of material and redundancies, among the participants. Thick description (Geertz, 1973) provided sufficient detail to code and analyze the material.

Face validity was established by collecting data from the individual participants who are experienced expatriates; the subject matter under study (Golafshani, 2003). Construct validity was established through the use of questions that were directly related to the expatriate experience, which was under investigation (Golafshani, 2003).

Ecological validity was provided by the generalizability of the participants' responses to the experience of other expatriates (Golfshani, 2003).

Results

Although the initial focus of this study was the expatriate who was sent overseas and repatriated, it became obvious that there are many roads for the expatriate to follow once they are sent abroad. These stories and experiences were rich, with material covering many aspects of the expatriate adjustment process relevant to this study. Seven of the participants had more than one posting overseas. The easiest interview to analyze and code was an interview wherein the participant was sent overseas to one posting and then returned to the home office without further postings. Seven participants transferred to another posting from the original posting. Six participants returned and left again, and two changed jobs. One started his own business. The participants who had several years' experience in different countries had a wide variety of experiences to relate. I encouraged those to choose examples that could be representative of their situation in the hope that these might provide future readers with useful and descriptive data.

Further results of the study and the analysis of the narrative data are presented in two parts. Part one introduces the participants and provides background information about the individual along with a brief description of the participants' demographics, time abroad, and location, as shown below. Following this discussion, the participants are introduced with an overview of their experience and a comment characterizing their story. Part two presents the results and the analysis of organizational support, the contexts, the themes and motifs affecting the expatriate process; including cultural

adjustment and repatriation for the expatriate and is organized by the topics derived from the research questions and the literature. The participants' relevant narratives are summarized in each section, and tables have been created addressing specific themes that arose during the coding and reduction of the data. The tables provided an opportunity for comparison of the differing expatriate situations and concisely illustrate and summarize the various outcomes possible for the expatriate experience.

Part One: Introduction to the Participants

This section presents a short summary of the experience of each individual working abroad, including the place, time in their lives, and overview of job responsibilities. These stories use the participants' chosen pseudonyms. They present a short characterization of their experience as a theme in their story. Table 1, below, provides a succinct overview of the Demographics of each expatriate.

Table 1.

Demographics of Participants

Participant (Alias)	Profession	Time Abroad	Location	Age at Time of Expatriation	Demographic Age Group (Current)
Gabriel	Executive	4.5 years	London	40's	50-59
Brad	Attorney	2 years	London	40	50-59
Ellie	Attorney	2 years 10 years	France Scotland	30 30-40	40-49
Allison	Manager	8 months 2 years 6 years	Sydney Hong Kong +Asia offices London		60+ Q
Frank & Lucy	Executive & Spouse	2 years 6 years	Bahrain Belarus	50 50	60+ 60+
Louie	Construction	1.5 years 2 years	Antigua Thailand	20 40	60+
Denver Dave	Engineer	20 years	Europe, Africa, Asia	40 +	60+
Waldo	Engineer	20 years	Dominican Republic, India, China		60+
Ted	Teacher	2 years 1 year	Vietnam Bangladesh	50	60+
Craig	Teacher	6 years	Japan	40	50-59

(table continues)

Participant (Alias)	Profession	Time Abroad	Location	Age at Time of Expatriation	Demographic Age Group (Current)
Marie	Teacher	20+years	China	30 +	60+
Gary	Writer/ Teacher/ Consultant	15 years 6 months segments	India, Thailand China	20 +	30-39
Peter	Grad Student/ Religious Guide	2 years 2.5 years	Italy Jerusalem	50+	60+

Gabriel. Gabriel was a senior executive in a multinational company based in the Midwest that had 70% overseas sales. When he was in his mid-forties, he was sent with his family to London for four and-a-half years to be President of Europe, the Middle East and Africa. His responsibilities included supervising general managers from 22 different countries in those regions.

He described his experience as follows:

It would be a journey, it would show ups and downs, it would show exciting things and really challenging days. It would end up having really positive starts and then some challenges in the middle and would end on an upbeat note.

Brad. Brad was working at a California bank that wanted to open a branch in London. He had been interacting with the clients in London and was well versed in the California bank's structure and legal matters, so he was chosen to go to London to work in the new office. He spent over a year in the office, followed by traveling back and forth several times over the next few years. He remains in the United States and currently interfaces with the London office. He categorized his time there as "constantly traveling off to foreign lands and having great experiences." It was an "adventure in the sense of getting exposed to new foods and culture and people."

Ellie. Ellie was working for an international aircraft manufacturing company in the US. They wanted to open a subsidiary in France and needed an American attorney versed in American law. An international group: the British, the French, and the Italians owned the company; they each had attorneys on staff. Ellie spent two years in France where she met her husband, who was from Scotland. She then transferred to the

company office in Glasgow where she remained for ten years working and living with her husband. She described her time abroad as a “series of comedy vignettes”.

Allison. Allison was working for an international company, after expressing her interest in working overseas her company sent her to Sydney, Australia. After a few months her company decided to transfer her to Hong Kong. She was a regional manager, which required travel to the other offices in Asia. After about three years she returned to the US. Several years later, again working for another international company, she was sent to London where she spent a total of six years working for two different international companies. Her last company returned her to San Francisco. She described her experience, and attitude of willingness to travel as “She’s off again.”

Frank and Lucy. Frank and Lucy went overseas after their children were grown. He had been working as an executive manager in a soft drink company and got hired by an international company to open new markets. Their first posting, for two years, was in Bahrain. Following this they were sent to Belarus for six years. These two countries were extremely different, which is reflected in their experience. Their response to the question of a storyline was: “Adventure, surprises, hardships but ultimately a great experience. We would do it again.”

Louie. Louie worked on construction jobs in two different countries at two different times in his life. In his late 20’s he was sent to Antigua, where he was part of a team who were remodeling a local hotel. He supervised local workers. His overview of his expatriate experience in Antigua was “definitely an adventure story, a coming of age.” Workplace conditions were unique. One of the main differences between working in the US and in Antigua is that the workers in Antigua made everything from scratch;

there were no prefabricated parts at the lumberyard. The weather permitted working in a bathing suit, in contrast to steel-toed boots.

His second construction job, in his 40s, was in Bangkok, working for a German firm. In Bangkok he spent the first two weeks looking at plans and reading specifications. He was a site manager and the people under him were managing the local workforce, so he was more isolated from the local culture than he had been in Antigua. He did not interact with the local people much in Thailand, as his job responsibilities were quite demanding. Nevertheless, he enjoyed traveling around the country and exploring the environment and culture. He described his work in Thailand “as an educational film, . . . I spent a lot more time working there, and you really get sucked into a project.”

Denver Dave. Denver Dave worked with an international construction company as an engineer and spent 20 years overseas with his wife in various countries including Germany, Holland, Belgium, Italy, the United Kingdom (UK), and Korea. His overall description of his extensive experience is as follows:

So, it was like you're always on vacation. You know we worked very long hours, sometimes we were working week-ends, but other than that you're in a new country so you can go on vacation on the weekend; you don't have to mow the grass, you don't have to go wash the car. So, it was basically a vacation when you're not working, so we enjoyed it.

Waldo. Waldo was an engineer who was sent to the Dominican Republic to build a factory for his company, taking his family with him. He later did some work in China, India, and Bangkok, Thailand for several years. He described his experience as an

“Amazing education, besides working for the family and having the family travel to places they’d never been, and moving schools for my children, it was fabulous, it was fabulous.”

Ted. Ted earned a master’s degree in Teaching English as a foreign language and was selected by the US State Department to teach overseas. He was sent to Vietnam where he taught at a local university for two years; then he was sent to Bangladesh to train teachers for a year before returning to the US. He described his story as “a poor, naïve kid from West Virginia who barely escaped being sent to Vietnam to fight, and then 40 years later this same government sends me to Vietnam to teach.”

Craig. Craig was working as a facilities manager for a college in California. At that time, he was studying Japanese as a hobby, and he had the opportunity to meet many Japanese teachers who visited his college from their sister city in Japan. They invited him to their university in Japan to teach English. He taught at a two-year university in Japan for six years, then teaching English at a local YMCA for another year. After a year of travel throughout Asia he returned to the US. He described his story as “Falling forward ~ not knowing what to expect and going with the flow.”

Marie. Marie had previous experience as a Teacher of English as a Second Language (TEFL). She was invited to China to teach in a graduate level program for advanced Chinese students while she was studying Chinese in Taiwan in an American-Chinese University program. She taught in this program for a few years while in her early 30’s. Subsequently she continued studying Chinese, working in China and in the US with Chinese educational programs and teaching English to Chinese students. Describing her experience as story she states,

...it would be about somebody who is learning things that you would expect to not be able to learn at that age... or something like that. It might not be a fascinating movie or a book, but it would be a learning experience.

Gary. Gary began his overseas experience soon after college in his early 20's. He was hired by a research institute in India as an intern in the field of alternate education. His interest in Vedanta motivated him to go to India. His initial assignment was six months, and he continued to return the next several years for six months each time, and later began working in Thailand as well. He describes his experience as “a journey of going from where I grew up to be a global citizen. That’s really what it is. Not a journey from Ohio to Thailand or India, it’s a journey of making the world my home.” Now in his late 30's he continues to spend half the year in Asia; he has developed a mobile career as a writer and consultant.

Peter. Peter lived overseas on two separate occasions. He was part of the Roman Catholic Benedictine Monastery as a graduate student, and in his first expatriate posting he was sent to Rome for an advanced religious studies program. The second time, he relocated to Jerusalem, where he had previously been in the Seminary. He worked as an assistant with an entrepreneur leading tours around the Holy Sites of Jerusalem for Pilgrim groups and Church groups. Peter worked with him for two and a half years; then returned to the US and resumed service in the Church. He refers to being treated as, “Uncle Peter, discovering the ancestors. It would be like someone finding relatives they didn’t know...” when describing his time in Jerusalem.

This section has introduced the 14 participants and provided a summary of the expatriate’s situation. A brief description of the participants’ demographics, time abroad,

and location has been presented in Table 1. Part Two supplies more details about their situations, as it relative to the topics under analysis.

Part Two: Results and Analysis of Topics and Themes

Part Two presents the overall results of the study and organizes the participants' narratives by eight main topics explored in the literature review. Those topics are: Organizational Support, Cultural Adjustment, Positive Experiences, Difficulties, Success or Failure, Advice, Most important Impression of the Expatriate Experience, and Repatriation. Additional themes emerged through the narratives and the analysis of these topics.

Organizational Support

A fundamental element of the expatriate experience is the interface with the organization. Often the expatriate is leaving from a home office in the US and arriving at a branch office. There was a continuum of organizational support factors for the expatriates. In several cases, the foreign posting arrival lacked any advance planning for the expatriate. Organizational support ranged from complete support, shipping household goods and cars overseas, providing housing and schooling for the children, to such lack of support that the expatriate needed to find housing on their own time, using their own transportation. This section examines the themes that arose from the topic of organizational support. These themes arose from two interview questions: How did this happen that you were sent overseas? (Question 2) and How did you feel about the organization's role throughout this process overall? (Question 9)

Louie received housing by his employers in both postings. In Antigua he lived in a hotel and took his meals there. In Bangkok the German company installed the workers

in an apartment building, furnishing separate rooms and a shared kitchen. Marie lived in a dormitory in the Chinese University where she taught, and Peter lived in a monastery in Rome and a house provided by his employer in Jerusalem. Frank and Lucy lived in a house in the expat community enclave in Bahrain. Allison was set up in a service apartment in Hong Kong, and her employer assisted her in finding an apartment. In England, Allison was set up in a service apartment and found an apartment through a friend. Ted was assisted in finding a house by his liaison at the University in Vietnam. Denver Dave's site manager assisted him in locating a house in different locations.

Five participants experienced varying levels of organizational support with various problems. Gabriel's organization provided him with a housing service, but they were so inadequate he had to find another service, which provided him with an excellent home in an expat neighborhood. Brad was provided an apartment by his firm but was unable to get into it for three days, and then the furnishings were incomplete, and it took him six weeks to get Internet connection at home, which was a problem, as he often had to do work in the evenings. Waldo's household goods were held up in the docks in the Dominican Republic as he refused to pay local bribes, he had to live in a hotel for seven months until his container was unloaded, and his family could join him in their house. Craig's employer introduced him to a real estate agent to find an apartment, but it was in a bad location. Craig had to find another real estate agent and another suitable apartment. This was satisfactory for Craig but caused a loss of face for his Japanese employer.

Ellie's initial organizational support for housing was less formal. Ellie's French office mate assisted her in finding an apartment and signing the papers. The company gave her a stipend for furniture and had it installed. However, no one advised her not to

live next to the train station where the prostitutes hung out every day. After a few months she had to move and received moving assistance by her friends. When Ellie got married, she was transferred to the office in Scotland and lived with her husband. She enjoyed the support of having his family nearby. When her father became ill back in the US her company arranged to give her an account in the States, so she could return frequently and visit her father.

Three participants had difficulties in finding adequate housing. Allison, In Sydney, Australia, was provided absolutely no support and had to either take public transportation or rent a car to find an apartment. After a few roommate situations that did not work out, she finally found a residence house where she had a room and shared a kitchen. Frank and Lucy spent a year in a hotel in Belarus before a Russian friend finally found an apartment for them. After doing some renovations, they moved in. Gary expected the Director of his Institute in India to provide him with housing and meals. He did receive housing, which he describes as “a small sort of almost concrete bunker in a little housing complex with some other Indians that were living like locals.” There was no refrigerator or cooking supplies. His employer obtained a cot and sleeping bag for him. He often went without meals, and sometimes he would eat at the Institute. As an added insight he mentioned that when he left India and he returned the sleeping bag, his employer complained that Gary had been unable to remove all the rat poo from the bag.

Housing support did not correlate with the overall size and reach of the organization. Denver Dave, Waldo, and Frank and Lucy all worked for large, multi-national organizations, but they had different experiences with housing, which was affected by the local culture. Their organizations could have done more to alleviate these

local problems and execute a smooth transition. Allison did well in Hong Kong and England, but in Australia she received no support from the local office. Ellie enjoyed support from her home office for housing, but the locals did not inform her about the location of her apartment. This appears to be a case of lack of experience in anticipation of this possible problem. Louie enjoyed complete support in living conditions, allowing him to focus on his work. Gary expected complete support by the Institute in India; consequently, he did no advance preparation, which he later felt was a mistake. Craig's experience in Japan highlights a cultural dilemma. Japanese culture stipulates that a real estate agent is required to find housing. Craig's employer provided the real estate agent for this activity, but the real estate agent misled Craig about the apartment, causing him to start over with a new real estate agent. This created a loss of face to previous agent and his employer. Craig thought this was necessary to fulfill his housing requirements. Situations such as Craig's might be unavoidable, and the expatriate must handle them with as much diplomacy as possible.

In-Country Support

Once the expatriate arrives at their destination, there are several elements they need to have in place to get started for a successful life. Housing, household necessities such as furnishings and electricity, transportation, schools for the children, language support if needed, banking, medical insurance and information; all are a part of our lives whether at home or abroad. Being in a foreign country, with different systems and rules, can make every day affairs more difficult and stressful. An on-site, local mentor, whether in the HR department, or simply assigned by the home office, is an important part of introducing the expatriate to the local logistics and paving the way for a smooth

transition to living abroad. The participants in this study gave examples of difficulties they had in the beginning of their assignment, which could easily have been addressed by their companies. Table 2, below, summarizes the level of in-country support received by the participants.

Table 2.

In-Country Support

	Gabriel	Brad	Ellie	Allison	Frank & Lucy	Louie	Denver Dave	Waldo	Ted	Craig	Marie	Gary	Peter	Denise
Extensive					X ¹	X ^{1,2}	X#	X		X	X		X	X
Some		X	X	X ^{2,3}	X ²				X					
Little	X											X		
None				X ¹										

Key: “X” plus number reveals first and second locations, # = multiple locations.

Aside from the inadequate house searching company, Gabriel received little in-country support from the London HR department. His family lived in an expat neighborhood, his children attended the International School, and his wife became involved with the other spouses at the school. His first day at work there was no orientation, there was no office for him, and the person he was replacing was still in the office. Until he left the other workers were not friendly to Gabriel. Although he was provided health insurance, there were some problems with the medical system in London and Gabriel had to send some family members back to the US for treatment.

Brad received no first day orientation at his office. The HR person took him to lunch, but Brad did not know what he needed yet, so could not ask for it. His apartment was incompletely furnished; he had to buy kitchen supplies and linens. His clothing dryer was inadequate, and he had to send his clothes out to the dry cleaner. The refrigerator was so small that he had to shop for food every other day. It took six weeks to get the Internet installed, which was an inconvenience, as he had to often work at home. He was provided with health insurance but was not informed how to navigate the medical system. HR had the best intentions but did not realize what an expat would need. The attitude that going to London from the US was not a significant difference, coupled with the idea that people should feel lucky to have the assignment in London, prevented HR from developing a solid plan early on. Brad, and other expatriates that came shortly after him, presented the HR department with ideas to improve the onboarding and support of expatriates during their London assignment, leading to a more robust expatriate support system. This is an example of how an organization learns what is needed for

expatriate support by feedback from those who in the first groups. One doesn't always know what one does not know.

Ellie received good logistical support with her apartment and furnishings, and she had her car shipped over. The only orientation she received was signing papers in HR upon arrival, and it was down to business on day one. There was no cultural orientation. She spent some time traveling to other offices to negotiate contracts. After two years in France she married and transferred to Scotland, home of her husband, where she worked in various divisions all over Britain.

Allison did not receive support in Sydney. Transferring to Hong Kong, as a senior manager, she received in-house support in many ways, not only in finding a place to live, but in obtaining a work permit, local reservations, and the like. In England, Allison needed a local reference in order to open a bank account.

Frank and Lucy, worked for an international company, and received work support in both Bahrain and Belarus, but little cultural orientation. As large international corporations go, they often carry their own culture with them, and the job is basically the same everywhere in the world. The interaction with the local culture is based on the requirements for local workers, and the personal preferences of the expatriate. That is, some expatriates may venture out into the local environment, others may remain within the expat community. Language differences are handled through interpreters. In Bahrain, the workforce was composed of many different national groups, depending on the job classification, and the Royal Family, who was the owner of the local franchise, was not working. When Frank arrived, it was down to work the first day, with no orientation. Lucy described it as "He was the boss, he should know what he's doing" since he was

doing what he had been doing in the US. In Belarus Frank was dependent on an interpreter at the job site.

Louie's supervisor established him in the work place in Antigua. However, he left shortly thereafter, and Louie had to do the job on his own, describing it as a steep learning curve. His ability to learn and succeed increased his confidence. In the Bangkok position, Louie's German supervisors had everything completely organized, providing him with support and training, and the project ran smoothly. They sent him back to the US twice a year for vacations.

Denver Dave received housing stipends and cost of living allowances in his various postings. Working for a large international company provided a company culture that supported the large expatriate community of workers and their families. Denver Dave did find, however, that often the HR department was not informed on the required paperwork for a new country, as they had no overseas experience. Denver Dave became adept at negotiating his own paperwork as he earned through experience what would be required.

Waldo received housing and a private school for his son while in the Dominican Republic. He received all the logistical support he needed to build and run the new factory and obtain parts.

Ted's in country support derived from his University. He had a liaison at the university who assisted him in necessary day-to-day affairs. He depended on his English-speaking students for help as well. He met a British woman in Hanoi who had been teaching in Vietnam for several years, and she provided him with teaching materials she

had developed for preparing students to take the TOEFL exam and for English language workshops. He used these materials to great success.

Craig received ongoing support from his University in the form of a library full of teaching materials, and a secretary provided for the teachers.

Marie received housing and teaching materials from the University in China. There was a doctor on the premises for medical needs. She had a bicycle and was able to travel around the town easily.

Gary's expectations for support from the Institute in India were not realized. The housing was primitive, and the meals were irregular, but there was social support from the members of the Institute. His associates took Gary around to visit villages and he felt he had a local experience he would not have been able to achieve on his own as a Westerner.

Peter enjoyed substantial support while living in the Benedictine monastery in Rome. He had Italian lessons in the classroom and learned informally with the local citizens. All of his needs were taken care of. His sojourn in Jerusalem found his basic needs for housing and work salary met. His church at home paid for his medical premiums. He became a part of the local community.

These stories illustrate the self-efficacy of the expatriates in this study. Self-efficacy is a motivating factor as it demonstrates self-confidence related to goal accomplishment (Bandura, 1986). Whether using their own resources, receiving assistance from the local community or their colleagues, they managed to solve problems as they arose and continue to increase their adjustment to their assignment and improve their performance.

Housing. Housing is a fundamental necessity; getting settled in a foreign country, feeling secure and not having to worry about where one lives, allows a person to focus on their professional duties. Housing support for these participants ranged from complete to absent. Nine individuals were provided housing, one of which was rather primitive. Two individuals found housing with assistance, and two needed to find housing on their own. Table 3, below, summarizes the parameters of the housing situation.

Table 3.

Housing Support Table

	Gabriel	Brad	Ellie	Allison	Frank & Lucy	Louie	Denver Dave	Waldo	Ted	Craig	Marie	Gary	Peter	Denise
Provided		X		X ²	X ¹	X ¹ , X ²					X	X	X	
Good Support	X		X	X ³			X [#]	X	X	X				X
Minimal Support					X ²									
None				X ¹										

Key: “X” plus number reveals first and second locations, # = multiple locations.

Cross-cultural training. Cross-cultural training covers a range of topics; not only cultural norms and language, but also local business practices, communication styles, political realities, and unanticipated subtle details in daily life and their possible affect on the expatriate experience. A basic introduction to the culture and language, and local business practices, creates a foundation of expectations for the expatriate. An increased cultural sensitivity will enable the expatriate to navigate in the new environment. Table 4, below, summarizes the extent of cross-cultural training received by the participants.

Table 4.

Cross-Cultural Training Analysis Table

	Gabriel	Brad	Ellie	Allison	Frank & Lucy	Louie	Denver Dave	Waldo	Ted	Craig	Marie	Gary	Peter	Denise
Extensive														X
Some	X/O								X					
Beginner			X											
None		X/O		X/O	X	X	X	X		XP	XP	X/O	X	

Key: X = Level of training
 O = English speaking Office or country
 P = Participant had prior knowledge of language and country

Only two individuals in this group received formal cross-cultural orientation prior to their overseas assignments. Gabriel and his family received a four-hour orientation before leaving for London. Ellie was introduced to her colleagues at a dinner prior to beginning of her assignment. Ted, hired by the US State Department, received the most pre-departure orientation and in-country training. He attended a weeklong training in Washington, D.C. before departure. This included information about the program, resources for him to use while teaching, a medical exam, and details on his insurance policy. Upon his arrival in Vietnam Ted took part in a three-day orientation, which briefed him on cultural topics.

The remaining 11 individuals received no formal cross-cultural training or orientation. In most cases, this was not significant, for reasons specific to each situation. Brad received no cultural orientation, but he had previously visited and worked with the London office, so they were familiar with each other. Ellie, an experienced international traveler, received no cultural orientation for any of her assignments. Frank and Lucy received no cultural orientation before the assignment in Bahrain, or before the transfer to Belarus. Louie received no cultural orientation prior to his job in Antigua. However, he did receive some advice on local culture by his German employers when he arrived at his posting in Bangkok. Denver Dave did not receive cross-cultural training before any of his assignments, his company was so large that it provided an expat community within which most of the employees and families lived. Waldo's assignment was to build a factory exactly like the one he managed in the US, and it was on a US base, therefore, he did not receive any cross-cultural training. Craig received no cultural orientation for his job teaching English in Japan. Nonetheless, he had already studied Japanese culture and

language, so he felt somewhat prepared. Marie did not receive cultural training before her position teaching in China. Although she already knew the Chinese language and had been living in Taiwan, she felt that she would have benefitted from cultural training for China as it was different than Taiwan and she made many mistakes early on. Gary received no cross-cultural training before going to India. His only preparation was his interest in Vedanta philosophy, but it did not prepare him for the living conditions and cultural differences he experienced. Gary's experience was transformative; it changed the direction of his life. Peter did not receive any preparation before going to Rome to study Italian, but since he was a monk living in a monastery, that was his cultural context. His work in Jerusalem as a tour guide for Holy Sites was also subsumed into his context as a religious ambassador.

The various difficulties faced by all the expatriates were managed through their efforts as individuals. They all demonstrated a strong sense of self-efficacy in handling their challenges and overcoming obstacles. Therefore, it can be said that correct expatriate selection is a fundamental factor in their success and is an organizational responsibility.

Language training. Language ability is crucial to communication in business and life in general. Many expatriates function in English speaking offices, therefore, have no need for another language to fulfill their work responsibilities. Nevertheless, to become involved in the local community, language facility opens many doors and hearts. The local community may assist the expatriate in guiding the expatriate through cultural complexities and situations. Table 5, below, summarizes the level of language

proficiency for the individual participants in this study. This includes training they received, prior knowledge of the language, language learning in the country.

Table 5.

Language Analysis Table

	Gabriel	Brad	Ellie	Allison	Frank & Lucy	Louie	Denver Dave	Waldo	Ted	Craig	Marie	Gary	Peter	Denise
Extensive										XJ	XC			XA
Some					XR	Xd		XS					XI	XF
Beginner			XF		XA								XA	
None	0	0	0	0		0	X		X				0	

Key: 0 stands for individuals who were in English speaking countries and/or workplaces.
 X stands for the level of language proficiency they reached
 X plus another letter – other letter stands for the language they learned.
R = Russian, A = Arabic, I = Italian, F = French, S = Spanish, J = Japanese,
C = Chinese, d = English dialect.
A few individuals were in multiple locations = more than one language

Of these participants, nine individuals worked abroad in English speaking offices and needed no language training. They were Gabriel, and Brad in London, Allison in London, Australia, and Hong Kong; Gary in English speaking India, and Ellie in an English-speaking offices in France and in Scotland. Ellie was provided some French lessons and did learn some French. Louie was in an English-speaking company in the British West Indies, although he did have some difficulty with the local dialect (*BiWi*); and his work crew in Bangkok, including his German supervisors, all spoke English.

Peter worked in an English-speaking office in India and had no language difficulties. Denver Dave worked with an English-speaking crew, and local translators when necessary, on his overseas job sites. He did have the opportunity to learn other languages at times but did not pursue this. Waldo, working in the Dominican Republic, made an effort to learn Spanish on site to better communicate with his crew. Frank and Lucy had no Arabic training before being sent to Bahrain, and Frank did not need it for his job. They did receive some Russian training before going to Belarus, but Frank always used translators in the workplace. Lucy learned more Russian in country as she had many local friends. Ted was at a disadvantage in Vietnam as he had no language training and knew neither Vietnamese nor French. As he lived in the village his communication with his neighbors was all non-verbal. He depended on his liaison at the University, and his students, who spoke English, to help him with any daily activities such as paying bills, getting the train, and the like.

In a class of their own, Marie and Craig had extensive knowledge of Chinese and Japanese respectively. With an interest in the language and culture, they both had deep cultural experiences that informed their experience of being in the world. Gary, even

without local dialect knowledge in India, working in his native language, also had a substantial existential shift after his first trip to India. Ted also changed the direction of his life, even without the local language experience.

Cultural Adjustment

This section covers the topics addressed by responses to questions 3 through 8 where the issue of cultural adjustment appeared. These questions were: (a) Tell me about your first day in the country (Question 3); (b) Tell me about your first day at work (Question 4); (c) How would you describe your experience with setting up your household (Question 5); (d) How would you describe the changes you went through in the first six months (Question 6); (e) Tell me about the experiences you enjoyed the most (Question 7); and, (f) How would you describe the most difficult experience you had? (Question 8).

Cultural adjustment is a broad topic that covers the expatriate experience both within the workplace and the surrounding environment. In a family situation, the spouse and children also need to adjust to their new situations and social groups. Family adjustment can affect the expatriate's success in the workplace. The three tables presented below, Table 6, Table 7, and Table 8, tracked the various factors that influenced cultural adjustment. In Table 6, the focus of cross-cultural assimilation is task focused, involvement in the local culture, and language. Table 7, below, compares levels of housing support, cross-cultural training; language training and prior language acquisition among the participants. Table 8, below, tracks the activities participants used for coping with their lives in a new cultural environment.

The responses varied among the individuals. Two English teachers had excellent foreign language ability and integrated well into the culture, the third English teacher did not have language ability and had more logistical difficulties. The three individuals in London, and one in India, did not have language difficulties. The remainder did not have language difficulties as their workplace was run in English.

The cultural adjustments ranged from the weather, an excessive drinking culture, a different work ethic, local government corruption, excessive bureaucracy, the lack of preparation by HR, population crowding, limited space, primitive living conditions, and technological limitations. The stories vary among individuals and overseas assignments, yielding a wide range of ideas for consideration in future expatriate training and study.

Table 6.

Cross-Cultural Assimilation Table

	Gabriel	Brad	Ellie	Allison	Frank	Lucy	Louie	Denver Dave	Waldo	Ted	Craig	Marie	Gary	Peter	Denise
Task-Focused	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Some Culture Involvement			X ¹	X ²			X		X						
Strong Cultural Involvement	X	X	X ²	X ³		X				X	X	X	X	X	X
Some Language			X		X	X			X					X	
Strong Language											X	X			X

Key: "X" plus number reveals first and second locations, # = multiple locations.

Table 7.

Participant Cultural Support/Assimilation Table

	Gabriel	Brad	Ellie	Allison	Frank & Lucy	Louie	Denver Dave	Waldo	Ted	Craig	Marie	Gary	Peter	Denise
Housing Provided		X		X	X	X		X			X	X	X	
Housing Assistance			X				X		X	X				X
Expat enclave housing	X				X		X	X			X			
Local Housing		X	X	X	X		X		X	X		X	X	X
Cross-cultural training	X								X					X
Language Training			X		X			X						X
Previous Language										X	X			X

Key: X = access to types of support.

Table 8.

Coping Activities Analysis Table

	Gabriel	Brad	Ellie	Allison	Frank & Lucy	Louie	Denver Dave	Waldo	Ted	Craig	Marie	Gary	Peter	Denise
Expat Communities/ Clubs	X		X		X		X	X						
Expat Friends	X	X	X		X		X	X	X					X
Local Friends		X	X	X	X	X			X	X	X	X	X	X
Exercise						X			X	X				X
Work	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Traveling w/family	X						X	X						
Local Travel		X		X	X	X			X	X				
Assimilated Identity										X	X	X		

Key: X = Coping Activity Utilized

These two tables illustrate the wide-ranging experiences of participants. Two English teachers had excellent foreign language skills and integrated into the culture, the third English teacher did not have foreign language ability but became involved in the local culture through his English language mentor and students. The individuals who worked in English speaking offices did not have difficulty at work and engaged with the local culture to varying degrees. Adjustment to the local culture encompassed such diverse elements as the weather, the work ethic, an excessive drinking culture, local government corruption, excessive bureaucracy, lack of proper paperwork by the Human Resources department, population crowding, limited space, primitive living conditions, and technological limitations.

Gabriel and his family lived in an expat enclave near London, his children attended the American School, his wife became involved in the American Woman's Club; enjoying substantial support. Although their medical insurance was provided, there were some health problems in the family and Gabriel chose to send family members back to the US for treatment. Brad also had some difficulties in understanding the National Health System when he and colleagues had health emergencies. A better explanation of the operations of the NHS, and an on-site guide, would have been helpful for these individuals during their stay.

Gabriel's greatest achievement came as he learned how to manage the directors of 22 different countries in Europe and the Middle East, increasing his professional skills. He exhibited social learning by improving his listening and asking a lot of questions to better understand his colleagues. Gabriel found that even though he was functioning in

his native language, he found his assignment to be a steep learning curve. He returned to the US with greater confidence in international management. His wife and children were associated with the American school, which allowed them to maintain their cultural and social identity within the larger foreign context. The family traveled throughout the region together, which expanded their world-view and brought them closer together.

Brad's British office colleagues behaved in a more formal manner, and dressed a cut above those in the US, thus, Brad had to upgrade his wardrobe, and use social learning skills to discern and adapt to the subtle interactions in the workplace. Brad also adjusted to the stricter regulatory culture of British banking, which characterized his increased diligence when he returned to the US. Outside of work Brad enjoyed the after work more relaxed social gathering with his colleagues as they visited the pub.

Allison and Ellie, the two single professional women in the study, were both strongly self-identified with their professions, senior manager and attorney respectively. However, they had different experiences in their social lives. Allison was not comfortable in the heavy drinking culture of London or Australia. Also, being single, she could not go out to a bar on her own. Ellie, single in France, enjoyed the social life with other single expatriates. They would go out together on the weekends in her car. When she moved to the UK her social life revolved around her husband's family; she also became involved with the International Association of American Women, allowing her to maintain her American social identity. Ellie worked long hours in the UK, but she did not mind as she was interested in career advancement. Allison adjusted to the shorter working hours in Australia, (4:30-5:00 p.m.) after which the employees would go out

drinking, and then the longer hours in Hong Kong, which lasted until 6:00 p.m. The fact that the shops were closed on Sundays in Australia put pressure on the people to shop on Saturday afternoons—creating time pressure. In Hong Kong there was some difficulty in finding items such as milk, and she also found the city uncomfortably crowded. In Hong Kong as a base she traveled around Asia, which made it difficult for her to establish social relationships. She found it difficult being alone, not being a part of a couple, or having children in school. This situation limited her social interactions and membership in those communities. Sometimes her colleagues would include her in events.

During their sojourn in Bahrain, Frank and Lucy were part of a large international expatriate community, enjoying fancy black-tie parties in the luxury hotels on a weekly basis. Bahrain was the center of financial activity in the region, housing offices of 17 offshore banks. The workforce in the country included various nationalities, each with their separate job functions, with the Americans being at the top of the hierarchy, while still serving the Royal Family who owned the franchise and did not work themselves. Frank was busy with work as a senior manager for an international company. Lucy had a busy social life. She enjoyed parties with the *Sheikhas* (wives of the higher ups) during Ramadan where they would dress up in beautiful kaftans and lie around on carpets, eating fruit. She described it as “being in a fairy tale.” Lucy also engaged in social and charitable activities with the American Women’s Club. She worked with an Australian woman in an English teaching project to young girls. This is an example of an opportunity for the spouse who does not have a work permit. They were part of a church group that met on the refinery grounds, and was organized by the head of the refinery, an

Australian who was the highest-ranking foreigner in the country (he was called the “White Emir.”) It was his status and protection that allowed them to have these church meetings.

Following Bahrain, Frank and Lucy were transferred to Belarus, a completely different environment. Although Frank’s job responsibilities remained basically the same, their environment presented many challenges, from housing - they spent a year in a hotel, to inadequate heat and cooling, to few available foodstuffs. Belarus was not well developed economically at that time. Nevertheless, Lucy made friends with local Russians and other expats, and they participated in weekly cultural activities. They met Russians who had connections with the local theatre and enjoyed many performances. Lucy remarked that the social gatherings lasted all afternoon, much longer than friends’ meetings these days in the United States. Since Belarus was considered a hardship posting due to the economy, Lucy and Frank enjoyed regular trips to other nearby countries for brief vacations.

As mentioned previously, Louie had some initial difficulties understanding the local dialect in Antigua, called *BiWi*. He did enjoy working and socializing with the local population, being invited to their homes and celebrations. As a Caucasian, it was his first experience being in a minority in a Black culture, which was eye opening for him. Being on an island created a feeling of being trapped for Louie; America is so vast with varieties of food, cultures, and climates, and it was easy for him to just get on the road and go to another place; in contrast to Antigua where everything was similar. Being on Antigua he felt “island fever” and after a couple of years he was glad to return home. His

few attempts at driving on the wrong side of the road led to near accidents, so he could not drive around. He visited a couple of nearby islands and had the opportunity to scuba dive and go swimming; this helped him adjust to his environment. In Bangkok, his main complaint was the oppressive humidity.

Denver Dave worked overseas for an international construction company for twenty years. His individual and social identity centered upon his work as an engineer. The company was so large that the workers and their families formed a large expat community, which often served their social needs, allowing them to maintain their American social identity. Often the local nationals did not make an effort to develop relationships with the Americans because they knew the Americans would not be there very long. Dave worked long hours, so his life focused on work and his family. His wife got work teaching English in Hong Kong and Korea. Dave and his family traveled around the surrounding regions of the various work postings. This was more of an adventure, and seeing the world, than adjusting to living in a foreign culture. Their large corporate footprint had them somewhat isolated from the local culture.

Denver Dave did have difficulties with the local culture in the workplace in two countries: Korea and Gabon. In Korea, the project specifications and planning were poorly organized, and the workers were not interested in improving the situation. In Gabon, the environment was dangerous due to malaria, poisonous snakes, and extreme poverty. The project in Gabon was a large with a substantial expatriate community, and that was helpful for his wife.

Waldo was building a plant in the Dominican Republic, which was located in a “free zone,” which meant it was US territory. He exhibited social learning as he worked closely with the local workforce and learned their language; making an effort to understand them and teach them how to do the work properly. The most difficult part of this assignment was the culture of bribery. His refusal to bribe local officials delayed his shipment offload for six months. He focused on his work and his primary individual and social identity was as an engineer and a manager.

Ted did not learn the local languages, Vietnamese or French, which left him feeling lonely and isolated. The first six months were difficult; he reached a crisis point where he had to adapt. He realized he had to get out and make friends, and he needed some exercise. He spent time with his students who spoke English, he made friends with other teachers who spoke English, and he developed a strong friendship with a British woman who helped him develop workshops. His neighbors began to look out for him, they taught him how to sweep the street in front of his house, when he was not there, they did it for him. Ted found a way to exercise when he got a bike and started swimming in the river. He fell in love with the country after his two years there and now lives there for several months every year.

Craig had been studying Japanese and was attracted to the Japanese culture before he went there, so he was not only prepared to live there but was highly motivated. Craig enjoyed teaching, had access to materials, had an excellent schedule of four months working and two months off, two times a year, which allowed him to return to the US and visit his mother who was ill. He joined a group of Americans and other expats who

played ultimate frisbee on Sunday, facilitating his adjustment with this familiar activity. In his quest to become a part of the neighborhood, he became a regular at a local restaurant, and he became friends with his neighbors, good enough to watch their cat while they were on vacation. The only difficulty Craig experienced was suddenly losing his university job. However, he quickly found another job at the local YMCA and remained there for another year. Overall, his adjustment was quite successful; it developed his professional identity as a teacher, and expanded his personal identity as a man, incorporating some of Japanese culture.

Marie's experience was similar to Craig's. She had studied Chinese before going to China and was interested in Chinese culture and philosophy. She had more difficulties adjusting to Chinese culture, as China was still underdeveloped at that time. She had a bicycle and would go out exploring in the town and shopping for food. She developed a few close friends although she found it awkward sometimes as they had very little money, every time they went out together Marie had to pay, which highlighted the difference between them. However, years later, as she has returned to China and visited her old friends, now they all have more money than Marie, as China's economy has advanced. She has immersed herself in the language, culture, and philosophy as she continued in her studies. Marie is the strongest example of cultural adaptation and assimilation.

Gary was also profoundly affected by his first experience in India in his early 20's. He did experience culture shock through his experience of extreme poverty, lower hygiene standards than he was used to, and more primitive living conditions. This led

him to have a different experience of himself being in the world, insofar as he did not require as much to live as he previously thought, changing his self-identity. His experience in India gave him the feeling that he was finally becoming the man he wanted to be. The desire to pursue this existential shift was so strong that, for the subsequent 15 years, he has continued to spend half his year in the US, and half in Asia. After returning to India for several years he expanded to Thailand and China. He has not learned any of the languages; he's more like Ted in that respect.

Peter learned some Italian in Rome, although his focus was on his life in the monastery, which is an isolated community. In Jerusalem, he learned some Arabic, and became a part of the community through his work as a tour guide to the Holy Sites. The Arab culture is famous for its hospitality and he was able to spend days with various groups and families in Jerusalem and develop strong friendships, which continue to this day. Throughout his travels he maintained his individual and professional identity as a man of the Church.

Adjustment varied by individuals. The professional, task-oriented context of Gabriel, Allison, Ellie, Waldo, Denver Dave, Brad, Louie, and Frank & Lucy served to strengthen their professional skills and extend their expertise to the international arena. They expanded their world-views, had adventures, and appreciated the opportunities they had received. Gary and Peter's contexts were more spiritual, and the adjustments they made to their environment were more existential than professional. Craig, Marie, and Ted, as teachers, improved their teaching skills as well as experiencing a personal

transformation as they adopted attitudes of their foreign cultures, and changed the direction of their lives.

Expatriates need to adjust to their new environment to the extent that their behavior is appropriate to the situation; work or social. Nevertheless, the very fact that they are expatriates, foreign to the new environment and its complex customs and norms, they are afforded some latitude by the locals as they progress through their learning and adjustment process. Expatriates add another dimension to their individual, social, and cultural identities as they expand their repertoire of behavior and social skills.

Positive Experiences

Positive experiences are the participant's personal assessment of the time spent abroad. The responses here varied from career advancement; personal growth, language fluency, opportunities to travel and see the world, development of a global perspective, improved professional skills and confidence, and an increased sense of self-efficacy. This section is in response to the questions: 7) Tell me about the experiences you enjoyed the most, 10) How would you categorize your overall success or failure, and, 11) How would you describe the long-lasting effects of your experience?

The three professionals, the executive, Gabriel, the banker, Brad, and the lawyer, Ellie, focused on career advancement and interaction through travel and family that became available through experiencing multiple cultures. Gabriel benefitted professionally from his overseas assignment in increased international management skills, and increased confidence. His family benefitted from the experience of overseas travel. His children benefitted by using their experiences in their application essays to

university and were accepted. Brad also developed his international management skills. His friendships with colleagues in the office provided him with insight into British culture, allowing him to avoid cultural mishaps. His experience in London influenced him to create more work-life balance upon his return to the US. Ellie also gained extensive international experience throughout her work in offices in France and the UK, advancing her career. She met her husband in France and enjoyed his family's support when they lived in Scotland.

As a manager Allison worked in various regional offices throughout Asia: Hong Kong, Japan, India, which gave her insight into the unique operations of each office. This not only advanced her career but allowed her to develop training materials for each office based on her understanding of their traditional procedures, which they were reluctant to abandon. She found a way to incorporate those procedures into the more modern functions of the computer systems. Her experience of the various linguistic groups increased her ability to understand problems different groups would have with language differences. Personally, her time in Asia enabled her to develop patience; a valuable skill. Allison explained,

... I have an appreciation for the different levels of language difficulty that people may have and how to express yourself, whether it be in training manuals or in a meeting, to make sure that everyone understands and that it's clear. That taught me a lot of patience – I was not a patient person before I left. That was valuable to me. I learned a lot of patience, especially in Asia, no use getting yourself in a lather because it wasn't gonna change... they're gonna do it this way.

Louie worked on large construction projects and developed his professional skills in both Antigua and Bangkok. This experience enabled him to easily get work when he returned to the US. His time abroad also allowed him to see some of the world and experience a feeling of adventure.

As an engineer employed by a multinational organization, Denver Dave enjoyed working on the different projects in various countries. He was often able to get out of the office and into the field doing work with different technicians. He and his family benefitted from being able to travel and visit many parts of the world. Waldo was also an engineer focused on the job in his overseas assignments. To that end, he was happy with the fact that he was able to get the error rate down to 0% in his new factory in the Dominican Republic. He and his family also travelled throughout different regions.

The three English language teachers, Ted, Craig, and Marie emphasized the learning presented by being culturally embedded with students. They all developed their professional skills through creating new courses and programs for those students. They expanded their cultural understanding of their countries and expanded their world-views. Ted realized that there were other cultures and lifestyles that are just as valid as the culture of the US. Marie continued her studies to obtain a graduate degree in Chinese language and philosophy. Craig adopted some of the Japanese attitudes that he found appealing. In particular, Craig gained an increased appreciation of man's relationship to nature and the use of space in design.

I really did pick up a lot in Japan in terms of staying within myself and being respectful of my space on the earth. It might have been because that was my 30's

and I think it is the time that people become fully functioning human beings anyway, it takes a while. I think in one's 20's one is often narrow minded into their own space, but I did become a fully functioning human being at least partly because of my time in Japan.

Two participants used their experiences to broaden their view of the human condition. Gary expanded his view of the world and his place in it. He began a personal growth process during his first trip to India that continues to the present day as he returns to India and other parts of Asia each year. He is developing his identity as a "citizen of the world." Peter also developed his understanding of humanity and his relationship to spirituality during his time in Italy and Jerusalem. He made long-term friendships and continues to return to the Holy Land each year. These two individuals' stories present as the most spiritual in context and continue to inform their lives and relationships with others.

In general, all the participants in this study felt they had positive results in terms of career development and improved professional skills. They all made lifelong friends, deepened their understanding of world affairs, and incorporated new ideas from different cultures into their lives.

Repatriation

Repatriation is the process of returning to the home country and office. None of the participants experienced a formal repatriation de-brief upon returning home. The Peace Corps, an organization that provided cross-cultural and language training, did not deliver a formal re-entry debrief. They supplied a re-entry stipend and allowed for

medical exam follow-up. Nevertheless, even without support, the participants all were able to advance their careers since their international experience was considered valuable. This topic was covered in the following question: 9) How did you feel about the organization's role throughout this process overall? If the response was vague, there was a follow up question specifically about the repatriation process.

As a professional, Ellie was able to leverage her experience. Ellie left the company that had sent her abroad while she was still living in Scotland, so there was no repatriation. She began working for another company in Scotland that returned her to the United States to open a new office in North Carolina. She found her return to be difficult and it took her about two years to readjust to living in the United States. She attributed this experience to the facts that she had been living abroad for 12 years, and she was originally from Brooklyn, which was a different culture than North Carolina. Ellie's experience raised the topic of cultural differences within the United States:

And I never realized that, people were not educated about the world ... It's like people -- you know coming back and it's -- where's South Africa? You were in Istanbul? What city is that? Is that in Amsterdam? ... I realized that maybe I wouldn't know either if I hadn't had those opportunities, right? So, I mean I was always really patient, but it was also for me eye-opening how ... insular that people were. You know they knew their part of Raleigh, you know and that was all.

Brad was also fortunate. When he returned to the home office, he remained in charge of the London account, and returned there frequently for the next few years. This

arrangement provided him with an opportunity to use the skills he had gained during his expatriation.

On the other hand, the company that sent Gabriel abroad did not utilize the extensive experience as an executive he developed while on assignment. Gabriel returned to his home office after four and a half years. Due to his success as an international manager abroad, his responsibilities were expanded to managing Japan, New Zealand, and Australia. Nevertheless, he did not feel he was given credit for his experience and, becoming bored, he left the company after three years to start a new venture.

Three participants retired. Frank was offered another posting after his time in Bahrain and Belarus, but he and Lucy decided it was time to return home, where he retired. Denver Dave also returned to the United States due to corporate cutbacks, and after a year in the United States, he decided to retire. Waldo spent about ten years overseas, working primarily in Asia. He decided to quit for family reasons and returned to the United States.

Two participants, Allison and Louie, experienced job loss upon returning home. Louie was returned from both overseas assignments to the United States where he was on his own to find another job. Allison returned to the United States and discovered that her company no longer had a job for her. Fortunately, she had previously negotiated a severance package, which she took and traveled to Europe. Upon returning she was able to work for her company again as a consultant.

Two participants, Craig and Ted, had longer transitions. Craig, after working in Japan for four years, traveled in Asia for a year. Ted spent two years in Vietnam and one in Bangladesh. Then the State Department returned him to the United States, but there was no repatriation debrief.

Three participants, Marie, Peter, and Gary continued the expatriate experience. Marie returned to the United States with her husband after a few years in China. She continued her studies of Chinese language and culture, returning to China for visits. She currently works with the Chinese teaching English language classes. Peter returned to San Francisco to his church where he currently serves. He continues to travel to Jerusalem each year to work with the Pilgrim groups. Gary returned to the United States and experienced himself as a different person. He has continued to work overseas for part of the year since then, for over a decade, developing his career as a consultant and international citizen.

I'm a global citizen now, I think everyplace becomes home... Since then I've gone on to continue to work with other cultures more. I've stopped seeing other cultures as other cultures really, um, everybody's coming from a slightly different place. I'm used to interacting with people who would speak different languages; and other places aren't different, they're home that I haven't discovered yet. Because by the end of the first six months in India; that was home; a vastly different home.

The characteristic of self-efficacy is again apparent in the performance of the expatriates. Their lack of repatriation by the home office did not prevent them from

continuing to find other work and developing their career by utilizing their international skills.

Success or Failure?

Success and failure, both on personal and professional issues, was expressed through the personal evaluations of the participants in this study. Along with achievements, this section also illustrates how participants overcame personal and professional challenges throughout the time of their overseas postings. This section was in direct response to the question: 10} How would you categorize your overall success or failure?

Although not directly considered as failures, a range of issues made life difficult on personal and moral levels for this set of participant expatriates. Gabriel and Ellie had family health issues that required trips back to the United States. Frank and Lucy felt restricted in their practicing their religion, and Gary had trouble getting his basic needs met in India. Marie noted economic disparities between her students and herself, and problems with discussing politics while teaching. Waldo experienced discomfort and personal inconvenience with bribery, and both Denver Dave and Louie noted problems with local workers' lack of motivation.

Brad and Allison experienced some discomfort with being alone, and Brad had to adapt to different mannerisms and dress. Ted was required to present some workshops and trainings for which he had no previous experience and was challenged with navigating around the village and country due to his lack of local language.

Peter found the ambiguity, and lack of structure in his work responsibilities to be a challenge. Craig, as he felt comfortable in the Japanese culture, had the fewest difficulties; he lost his job suddenly but was able to replace it with another.

Despite these difficulties, all the participants considered their experience a success for both themselves and their families. Those who considered their experience to be a family success were Gabriel, Denver Dave, Waldo and Frank & Lucy. Gabriel termed it a “High success.” His career took off. He and his family learned a great deal, his kids became stronger; they were able to get into good universities since they used their expat experience in their admission essays. The family grew closer as they were always together, and they were able to travel around Europe on vacations. Denver Dave said, “We loved it.” He felt it was something he and his wife could share with their children: the company paid for his son to visit twice a year and his daughter lived in France, so they could see her often. They traveled all over the world. For Waldo and his family, it was “an education, an opportunity to see the world.” Finally, Frank and Lucy felt the experience was a success from a professional point of view as Frank’s company achieved their goal of gaining market share for their product. Further, the couple enjoyed the adventures in both countries, having the ability to travel in the regions and see places that they otherwise would not have seen.

Those who undertook this journey as an individual also felt that the experience was a success. However, there was a wider range of feeling about the individual man or woman’s time abroad. For Ellie, Brad, Louie, and Marie, the focus of success was on the career path. Ellie felt the experience was, “Definitely a success.” Ellie felt privileged to

have the opportunity to work abroad and travel. She advanced in her career. Brad categorized it as, “a success overall.” For Brad, it was a wonderful experience and definitely made him want to work and live overseas again if he has the opportunity. Louie also characterized his experience as, “Definitely a success.” He commented that it was better to try and fail than not to try, as when we get older, we generally regret what we didn’t try. Moreover, the job in Bangkok helped on Louie’s resume. Allison also felt that she had an overall positive experience. However, her focus for success was on having the opportunity to experience and understand other cultures, taking advantage of cultural events in London, developing long-term friendships.

Two of the participants felt their success was fundamentally in the cultural experience. Marie felt her time abroad was, “Definitely a success.” Marie continued to study Chinese language and culture and work sometimes in China. She developed a program to prepare students in the United States going to study in China.

Craig considered his experience in Japan, and Korea as well, as an overall success. He had fun, the pay was good, he was able to travel for a year afterwards, and his vacation time allowed him to return to the United States to spend time with his mother who was ill. “I feel free mentally and physically because of those experiences, I have to say, it opens your mind and opens your life.”

One of Craig’s goals was to live in Japan as a regular, normal neighbor. He felt he finally achieved this status when his downstairs neighbors, who were going away for a few days, asked that he watch over their pet cat; a normal, neighborly, activity. He also

accomplished going to a local restaurant and asking for 'the usual' and receiving it.

Finally, he had friends who only spoke Japanese.

Three participants, Ted, Gary and Peter, viewed the experience on a deeper level than simple success or failure. In particular, Ted changed his perspective on the world., his experience was, "Without a doubt, success, but painful." He returned to Vietnam a few years later and has been living there half the year; he loves it there. For Gary, similarly, "It was a trial by fire, and I grew; it was like boot camp. I look back fondly, and I'm stronger now, but nobody wants to go through that." It was a huge existential shift. He felt that every experience after that has been easy by comparison. Finally, for Peter, the experience was a reflection of the learning inherent in his chosen life path as a priest. "For me, my humanness got to grow a bit, I hope, so I would call that a success; it was a great gift to receive. I'm still appreciating it every day." He found in his experience an opportunity to experience Divinity through encountering the unfamiliar.

All the participants experienced the time he or she spent abroad as a "success," no matter how great or complex the challenges they faced. In fact, overcoming the challenges and difficulties added to the feeling of success as it increased each individual's self-confidence. For several it changed the direction of their lives. They learned that they could live abroad easily, that there were other ways to earn a living, and that there were other pathways to being in the world.

Most Important Impression of the Expatriate Experience

This question sought to uncover the most significant feature of the participant's experience. This section addresses the question: 14) Tell me about the most important

impression this experience made on your life? These responses reflected events in their work life as well as cultural situations and their personal development.

Gabriel's experience increased his confidence and enhanced his professional identity. He stated, "It gave me a confidence that I could be put in many situations and be successful on an international level."

Brad had an expanded view of the world, filtered through a plurality that he gained. "I think in a different, better way, and became a person who wants to travel and experience culture more and get to know different kinds of people outside my usual routine – we get in a tunnel in our daily lives..." His experience expanded his social and cultural identity. Further, it made him realize we need a single payer health care system in the United States after seeing how it works in other countries. This illustrates how he stepped outside his American cultural conditioning regarding health care. Ellie gained an awareness of the bigger world out there. She discussed how privileged she felt at having the opportunity to work abroad. Her experience expanded her individual identity.

Working abroad helped Allison understand people and cultures and gain a respect for their differences. Being in London and Hong Kong, she experienced how, in these cosmopolitan cities, various cultures were able to live together successfully. She was aware of the sacrifices some had to make in order to adjust to a very different culture and way of life and has a better appreciation for other peoples and cultures. Frank and Lucy's experience, in both Bahrain and Belarus, was eye opening leading to a better understanding of a bigger world.

Louie returned home with the feeling that America is kind of isolating. We are focused so much on what is going on here and not what is going on in the rest of the world, and we have such a large impact on the rest of the world. For example, you can watch CNN in a bar in Thailand in a tiny village. Louie thought that it was important to travel to see how other people live, and the level of comfort there versus how we live here. His professional identity was enhanced by his increased skills, and his social and cultural identities were expanded.

Denver Dave considered his experience of living everywhere to be educational. This allowed him to realize what those other cultures are like, he learned how to be flexible with other cultures and deal with different people in various situations. He thought that the company has to realize that this is a hardship; you are away from your family for long periods.

Waldo felt that everybody should be thankful for what they have because it's only a spin of the wheel. "I could have been born in Bombay/Mumbai—and when I visit there, every single day there were these horror stories about the trains. People going to work, all these people trying to get on the train and every single day someone fell off the train and died."

The most important thing Ted learned was that you don't know what people are thinking about you. He was concerned about being an American in Vietnam; he thought they would hate him because of the war. But he learned from a documentary that the Vietnamese consider that they won the war, defeating the Americans, and the people who lost their lives were war heroes.

Craig found living in Japan benefitted his personal development; Japanese culture is very respectful of the environment, and their surroundings; and they are very good at organizing their population in a small country. He felt that he has become a better person by integrating this sense of respect. Since he was in his 30's during his time in Japan, he feels it helped form him as a functioning human being. His experience expanded his individual and cultural identity.

After leaving Japan Craig was able to travel inexpensively in Asia for an entire year. That was the first time in his life, since he was 16 that he wasn't working. The realization that he did not have to work every day, as he had been programmed to do as a man, was significant. A few years later Craig quit his job in the United States and spent two years in South America, living inexpensively, while he pursued a master's degree. He could not have imagined that prior to his experience in Japan. He planned to retire early, at 62, and live cheaply abroad.

Marie, coming from the United States, was struck by the fact that the Chinese never wasted things. If she wrote her phone number on a sheet of paper and prepared to tear it out of her small notebook, a Chinese person would stop her and just tear off the small part that the number was written on, they did not want to waste the entire page. This is a contrast to the waste that occurs in the United States. There were no overweight people in China years ago, they all rode bicycles. No one had cars. She noticed how things have changed during a recent visit, they have cars and there are overweight people.

Gary returned to the United States after his first six-month assignment in India and experienced coming back as a different person. He felt himself starting to slip back

into the person he used to be, responding to the expectations of others. But the seed of change was still in him, he used that global experience to move forward and become the man he wanted to be, by continuing to return to Asia every year.

As Gary went to India in his early 20's, it was an intense experience that helped shape him as an adult. He enjoyed the experience of being a global citizen so much that he continued, every year thereafter, to spend half his year in first India, then Thailand, and on to China and throughout Southeast Asia. He has learned life strategies from different cultures and is using that to develop his coaching business.

For Peter, this experience “reignited gratitude as my basic human emotion.” He felt grateful to meet people with such resilience, and happy lives in the face of great challenges. He experienced “the beauty of common humanity” and made lifelong friends and is still in regular contact with many people he met in Jerusalem.

Each participant returned with expanded self-confidence and a belief in his or her own self-efficacy. They enjoyed an expanded view of the world and felt a sense that most Americans are isolated from the rest of the world. The participants learned a respect for differences and found their experience to be educational, leaving them grateful for what they had. Several participants also mentioned that the experience had provided an opportunity to step outside the regular pathway of life.

Advice

Learning from the experience of others is an important aspect of the expatriate experience. Each participant had a list of advice that they wished to impart for further expatriates. These responses were in direct response to the question What advice would

you give other individuals going overseas? (Question 12). The responses reflect the experience of the expatriate and their values. Rather than summarizing these insights, the views of each individual are presented without alteration.

1. Gabriel. Gabriel had three pieces of advice to share. His first recommendation was, “Make sure your family has a network.” Gabriel recommends the American school or the International school. It provides a network of support with other parents and creates lasting friendships. He also advised, “Get the book, *Homeward Bound* by Robin Pascoe (2000) – it is about the re-entry process, which is one of the most challenging experiences you are ever going to go through.” Third, with regards to the organizational connection he advised,

Keep a strong sponsor/mentor in the home office so you won’t get lost. One of the biggest reasons expats leave the company after they return is because they lose their sponsor, or they don’t get credit for their overseas experience.

2. Brad. Brad had four distinct pieces of advice to share. His first piece of advice was, “Understand yourself and understand that this is going to have an impact in your life whether you realize that now or not.” Also, he recommended, “Be open-minded—embrace it; enjoy it, the good and the bad. And if you think you can’t enjoy it, maybe you’re not a good candidate for going overseas.” He also advised paying attention to the financial impact any expatriate assignment might bring. “Understand the financial impact, for example, maintaining your residence in the U.S. Taxation law is complex; do they have experts that are preparing our tax forms? It’s complicated and could be a negative experience.” Finally, he recommended that potential expatriates,

Talk to your company and understand what resources and programs they have in place for you and ask other people in your company who had that experience – what it was like and what they think, if they’re available. I *Googled* stories about Americans living in London. So, be prepared.

3. Ellie. Ellie’s advice involved social support and the repatriation process.

First, Ellie recommended that expatriates should, “...get involved with an expat organization. Get to know your local neighbors as well and invite them over to your house.” She also warned about the repatriation process, “People in the U.S. who have not been abroad will not be able to relate to your experience.” She opined that, “Companies need to have a repatriation process; a debrief. Expatriates need to know that when they come back to the U.S. it will not be the same as when they left, and they will not be the same,” and “Expatriates need logistical help when moving back to the U.S. such as where to live, information on traffic and public transportation, and parts of the city to avoid.”

4. Allison. Allison had five pieces of advice to share about her experience. Her first recommendation was to, “...visit the country before you accept an overseas assignment and make sure you want to uproot and move there. Take your family for the recon visit if they are moving as well.” She also said, “If it is the first time for someone going abroad, they will need more assistance than an experienced traveler.”

Her advice also included how to work with the company sending the expatriate overseas. “Make sure you have a work permit. Some companies actually send their employees overseas with a tourist visa; this is illegal to work with.” Plus, she advised the potential expatriate to, “Get everything in writing with a signed contract to cover every

element mentioned earlier, and everything that is relevant.” Finally, she talked about the logistics of moving to a new country:

When arriving in the new country, there needs to be assistance from the office as to how to handle personal affairs such as: finding an apartment, getting the electricity turned on, opening a bank account, filing taxes as an international worker, how to manage within the health system, what financial assistance is available for housing, the children’s school, will there be paid home leave during the assignment, what personal effects will be shipped over, and what personal effects/belongings will be shipped back home.

5. Frank and Lucy. Frank and Lucy had three pieces of advice that related to the two diverse experiences they had. First, they recommended, “Go with an open mind, don’t be afraid to try new things.” Secondly, they advised, “Learn about the country, get to know your neighbors. In Belarus we spent time with the people in the community.” Third, “Take time to travel around the region and see other countries.”

6. Louie. Louie’s advice was focused on cultural issues. First, Louie advised the potential expatriate to:

Definitely go! Before you go read up on the culture, so you don’t insult people, e.g., in Thailand it is an insult to show the bottom of your feet to someone. Read some of their history so you have an idea about the country, and to

Keep an open mind, go with the attitude that you are going to see what it’s like, and you know that you are going to return to the United States at some point. Go

without expectations because it is probably always going to be different than you expect.

7. Denver Dave. Denver Dave's advice was focused on pragmatic details, which included family considerations as his family came with him on his assignments. Denver Dave had two pieces of advice in that vein. First, he said,

Make sure you know what you're getting into. If the spouse goes along, they need something to do or friends who are in the same situation. We shipped our car over, so my wife would have transportation. If you are in a small place you have to think about what your spouse is going to do, and what school your children will attend;

and

You have to know the tax laws of your state because your taxes will depend on how long you are out of the country. If you own a home and sell it, you may not be able to afford another one when you repatriate because the prices always escalate.

8. Waldo. Waldo's advice was a mixture of enthusiasm and a pragmatic focus on details. He had three things to add. First, Waldo advised that the person considering the position of an expatriate should, "Do it. It's like going back to school. You benefit so much from learning about different cultures." Also, like Allison he advised the expatriate to, "Be smart with your contract – remember to consider household goods, family issues, schools, vehicles, and that the expat law is for the expat's protection. Be sure you understand the issues of Work permits, and the tax laws for both in the United States and

the overseas country.” Finally, as it concerned families with children, he advised, “Even your kids, they will kick and scream they don’t want to go but after it’s over they will love you for it.”

9. Ted. Ted had four pieces of succinct advice. First, “Make connections, find someone who has experience in your situation.” Second, “Use social media to find support. You need a local to help you navigate the culture, how to shop so you don’t get taken.” Third, “Open your mind. Be open to the experience.” Fourth and finally, Ted advised, “Don’t assume what people are thinking about you. It’s even harder to read signals in another culture.”

10. Craig. Craig had three specific pieces of advice. First, like most of the expatriates in this study he advised, “Be open to what happens.” He also advised the expatriate to be discreet. “Keep your opinions to yourself for a year, two years... don’t make judgments too early and stay open.” Finally, “Go with the flow and see if you learn anything, which you will if you keep your eyes open.”

11. Marie. Marie had five pieces of advice to share. First, “Make friends with the local people so you can ask them about things you don’t understand.” Second, “Learn the language.” Third, “Go out and explore.” Fourth, “You will be comparing your culture to their culture, try to learn about their culture that will explain their behavior.”

Finally, she advised:

Try to have a perspective. When does something you don’t understand, step back and, instead of judging ask yourself – where is this behavior coming

from? You're learning about the country, there's a lot you don't know, so what do you know that can explain this behavior, and who can you ask to help you understand?

12. Gary. Gary had five pieces of advice that were also pragmatic. His first piece of advice concerned communication, "Have a local Sim card and an unlocked phone. There's a maps program so you will always know where you are. You can use *Google translate*." Second, he advised the individual to, "Use resources – I use *Lonely Planet* and annotate." Third, "Get connected to a local before you go – a mentor, or just someone interested in your culture. There are forums to find them. They will help orient you to the culture and you will make fewer mistakes." Fourth, like many of the expatriates, he recommended that an individual "Go without expectations, go with an open mind to see what the place is going to be like." Finally, he opined that an expatriate must, "Realize you are going to go through a transition and that it is ok to have a little bit of home with you – a safe space; e.g., eat the pizza in India."

13. Peter. Peter had three pieces of advice that were, "Break through your fear and learn some of the language." Also, he advised that, "You will always be a foreigner. Be a good guest. Offer an opinion when asked but remember it's their country and their affairs." Finally, he said the expatriate should "Learn to deal with the feeling of homesickness you feel sometimes."

All of the participants offered thoughtful and useful points for consideration. Five participants advised being open-minded; and reading up on the new location, and six participants mentioned studying the culture. Practical ideas were having a strong mentor

in the home office, paying attention to the tax details of expatriation, and the contract one signs. General advice for future expatriates included: making local friends, traveling around the region, and going with the flow. Finally, important advice was to be aware that the expatriate experience is a process of transition for both the individual and the entire family, and they do not all go through the transition the same way, and at the same pace.

Cultural Assimilation

This section discusses the level of cultural assimilation and immersion that was undertaken by each participant. This discussion of the cultural assimilation of the participants moves from totally work-focused and a lack of necessity to learn the language, to being deeply involved with the language and culture of the host country. Six participants have integrated their experiences of the host country into his and her world-view, as well as learning to be fluently communicative in the host country language.

Denver Dave/Waldo: Work focused, traveled throughout the region with their families.

Waldo: Work focused. Learned a little Spanish.

Louie: Work focused, traveled in the area, learned about culture/history of the countries he was in. Learned to understand the local dialect, *BiWi* in Antigua.

Ellie: Work focused, traveled, learned some French and culture/history, married a British man; moved to Scotland.

Gabriel: Work focused, learned how to manage various cultures, increased his cultural sensitivity, and traveled with his family in the region.

Frank: Work focused, managed local work force, and traveled in the region.

Learned some Russian.

Brad: Work focused, got involved with the local culture, and traveled throughout the region. He continued contact with the foreign office and made long-term friendships.

Lucy: Got involved with local culture. Spent time with local women and expat women in Bahrain and Belarus. Learned some Russian in Belarus. Traveled in the region with Frank.

Allison: She had a high-level professional job, which provided her with an identity and respect in her different offices. Only one assignment, in Hong Kong, exposed her to a different language, of which she learned a few, functional phrases. Her personality allowed her to make friends in different places and take advantage of the travel opportunities and cultural offerings in various locales.

Peter: Got involved with the local culture, learned some Arabic, worked with Church groups and expanded his sense of his spiritual practice. Returned to the United States and continues to make trips to Jerusalem.

Craig: Got involved with the culture, learned the language, did everything he could to become a familiar neighbor. Has integrated aspects of Japanese culture and philosophy into his world-view.

Ted: He got involved with the local culture but did not learn the language. He developed training courses, which he taught at nearby Universities. After he returned to the United States, he spent three years coaching Asian students on how to navigate the American school system. He returned to Vietnam and lives there half a year.

Gary: Got involved with local culture, lived on the economy, learned the culture and philosophy, did not learn the language. Made a career out of it. Continues to travel to India and Asia, spending six months each year outside the United States.

Marie: Deeply involved with the language, philosophy, and culture. Made a career out of it. China has become an integrated part of her life and identity.

As a key part of the foregoing analysis of cultural adjustment and support during the expatriate experience, the research focused on language acquisition. Some of the expatriates needed it for work, others learned it to enhance their experience and deepen their knowledge of the culture. Table 2, below, presents a visual of the foreign language learning of the participants in this study. Included is the researcher referencing the Peace Corps experience. Some had no need of foreign language study if they were in an office (Hong Kong) or a country (Great Britain, India, Australia, Scotland) that spoke English. Their language status is represented by the “0”, which means there was no foreign language necessity.

Motifs

The summary below discusses the responses from the participants to question 15. This question was: If your experience would be made into a film, how would you describe it? These responses formed motifs through describing the participants’ descriptions of their overseas experience as a movie. Saldana (2009) described motifs as “part literary element and part psychological association.” (p. 108)

The motifs as presented by the participants speak of adventure, ambiguity, comedy, a love affair, going with the flow, and education. These are themes that can be

seen to represent on-going states of change. Several of the expatriates experienced personal transformations, which influenced the direction of their lives. They all considered their experience as a central event to their lives and personal identity. The response to this question provided a style of being for the expatriate experience.

1. Gabriel – a journey of ups and downs, exciting - starting out positive, going through challenges, and ending on an upbeat note.
2. Brad – An adventure story, a drinking movie.
3. Ellie, a series of comedy vignettes of her time abroad.
4. Allison – She’s off again – how she was willing to go to different countries and offices.
5. Frank & Lucy – Adventure, surprises, hardships – ultimately a great experience.
6. Louie – a coming of age adventure, with comedy elements.
7. Denver Dave – educational experience of living in other cultures.
8. Waldo – It was an education out of school.
9. Ted – It would be about a poor, naïve kid from West Virginia who escaped going to Vietnam to fight in the war, only to be sent there 40 years later by the same government to teach English. It’s about a childhood dream of discovering the world and living in another place, and it took a long time but finally came true.
10. Craig – Falling forward, not knowing what to expect and going with the flow.
11. Marie – Somebody maybe out of time with her culture, learning things later.

12. Gary – a story of cross-cultural love, expanding the self and what it means to be human.

13. Peter – The Jerusalem story would be Uncle Peter as he became part of the local culture and was adopted, as an older man, by many of the people who knew him. The Italian experience, being in an old civilization saturating everyday life, created the feeling of “meeting the ancestors.”

Underlying Themes

The final analytic category focuses on five common underlying narrative themes found in the overall data collected from the participants. These common themes have coalesced around the perception and interaction of self with the new environment: 1) interaction of self with context and others; 2) overcoming challenges; 3) concerns about fitting in with either the work context or the local culture; 4) being effective at work; and 5) self-enlargement in the world and with self-understanding. These themes rose in answers to each question, along with the advice. In particular, these expatriate participants took on challenges without any assurance that there would be support in the host country when they arrived. Even when resources were lacking, and office members were less than welcoming, each participant took it upon him or herself to get down to business and get the job done. They strove to fit in when necessary, and they managed to be effective at their assigned duties. The issue of the participant’s interaction with the environment and the context was foremost and remained a consistent theme across all questions.

Summary

Each participant returned with expanded self-confidence. Their success strengthened their sense of self-efficacy. This accompanied an expanded view of the world and a sense that most Americans are isolated from the rest of the world. The participants learned a respect for differences and found their experience to be educational, leaving them grateful for what they had. Several participants also mentioned that the experience had provided an opportunity to step outside the regular pathway of life.

In Chapter 4, I focused on the general analysis of themes and issues discussed by each of the participants in reference to their personal expatriate experience. The themes derived from the materials represented responses to the narrative inquiry questions. These questions focused on the main aspects of the expatriate experience and the continued adjustment, assimilation, and repatriation processes of the overseas assignment. Experiences that included families and spouses were only slightly enlarged in the concerns addressed, as a necessary awareness of the wellbeing of the spouse and continued education of children were added elements to the story. All expatriates went through an adjustment period, only those who were in certain construction jobs or Ellie, the lawyer in France, found themselves in more culturally isolated situations that did not require a deeper level of adjustment that would have necessitated language assimilation in order to function. English was the main language in their job functions despite their relocation to other countries. Despite this one major difference all the expatriates had

some difficulties in transitioning back to the United States during the repatriation term which lasted as long as two years for one expatriate.

Chapter five will further discuss these issues focusing on how these responses address issues presented in the cultural and psychological literature. In addition, the next chapter will chronicle the limitations of the research; the implications for future practice and research; and address the position and bias of the researcher.

Chapter 5: Discussion, Implications and Conclusion

Introduction

The purpose of this study was to use the qualitative methodology of narrative inquiry to investigate the process of the corporate assigned expatriate, the adjustment, transition and repatriation experiences, as a holistic process. The goal was to uncover additional factors that challenge, support and facilitate the overall process. The guiding research questions to uncover this process were:

1. What factors facilitate expatriate adjustment?
2. What are the main challenges facing the expatriate?
3. What strategies did the expatriate use to adjust to their environment?
4. What kind of support for the expatriate was provided by the home office, the local office, and the host country nationals?
5. Did the expatriate experience difficulties relative to the difference in cultural dimensions? (Hofstede et al., 2010).

This chapter examines the findings of the data collected to answer these questions. These findings were reported in the prior chapter in comparison with the cultural, expatriate and theoretical constructs appearing in the literature review. The theories examined in the literature review concerned adjustment in both work and social factors, social identity, social learning theory, self-efficacy and locus of control. The repatriation processes, and the lack thereof for a majority of the participants, is also

covered. Finally, the issues of living in another culture are explored. Based on this overview, the material provides some implications for both future research and practice, along with a discussion of the limitations of the research. Finally, the researcher's own reflexivity and biases are presented.

Interpretation of Findings

The order of the participants in this section is organized around the common attributes among participants relative to each discrete topic.

Adjustment

Cross-cultural adjustment is defined as the "degree of psychological comfort and familiarity that the individual has for the new environment" (Black, 1990, p. 122).

This adjustment phenomena include the three main aspects of the host culture as distinguished by Black (1998): general adjustment to the culture; interaction with the population; and work adjustment relative to the elements in their organizational work environment (Nolan & Morley, 2014). A second construct relative to adjustment is cultural intelligence. Cultural Intelligence (CQ) "consists of three fundamental elements: metacognition and cognition (thinking, learning, and strategizing); motivation (efficacy and confidence, persistence, value congruence and affect for the new culture); and behavior (social mimicry, and behavioral repertoire)" (Earley & Peterson, 2004, p. 110).

The variety of responses in the narratives made it clear that adjustment means different things to different people. The interview questions, which were deliberately broad, allowed for the variation of experiences by the participants and their approach to

cultural adjustment, including what they found difficult, and what they enjoyed most. Some participants discussed their adjustment to the work environment (Gabriel, Brad, Allison, Waldo, Denver Dave, Louie somewhat, Frank, Ted, Peter, Craig, and Marie somewhat); some explored their adjustments to the cultural environment in the country and surroundings (Louie, Gary, Marie, Lucy, Ellie, Craig, Ted, and Peter). This highlights one of the advantages to the narrative inquiry method, wherein the participant has the opportunity to share their experience in a broad, unstructured manner. According to Scarneci-Domnisoru (2013), “detailed and vivid descriptions cannot be accessed as efficiently with other research methods and techniques” (p. 21).

Adjustment includes numerous factors. Starting with the basic person-job (PJ) fit, it “is defined as the congruence or match between a person’s characteristics and those of the job or tasks that are performed at work” (Lee et al., 2010, p. 155). Moving through the levels, we go from PJ to the person-organization (PO) to the person-environment (PE) fit, including the vocation, (Makraiova et al., 2013). The purpose in reviewing the PJ fit, and even the PO fit, are that these components can be transferred from one culture to another, with the requisite cultural adjustments.

This study presented Denver Dave, an engineer, who worked in his professional capacity in an international organization for over 20 years in various cultures; maintaining the same PJ and PO relationship throughout, requiring little adjustment in those factors. Although the PE factor changed, with the different cultures and languages, the work itself was conducted in English or with the assistance of translators. The organization was so large that there was an expat community formed with the workers

and their families, of varying sizes depending on the size of the work site. This allowed Denver Dave to also maintain some PE consistency throughout his expatriate experience, within the larger culture. His experience illustrates how a large corporation carries its culture with it throughout the world, creating a community within the larger culture to which the expatriates belong.

Waldo worked for an American manufacturing company for 10 years in the United States, then they sent him abroad to build a plant to do exactly what he had been doing at home; thereby maintaining a consistent PJ and PO relationship. He adjusted to the culture in the Dominican Republic by learning the language to facilitate managing a local workforce. He practiced cultural learning in his approach to his workers. Cultural learning is “the process of acquiring culture-specific and social and professional knowledge during a sojourn with an emphasis on minimizing intercultural conflict in social encounters (Furnham & Bochner, 1982). Waldo went into his workplace with an attitude to be a sponge; to listen, sit with the people, learn their language and what they needed. “It was a great experience, but I mean we learned the culture with each other, we learned the words~.” Following the DR, Waldo was transferred to Asia and continued to do the same work throughout Southeast Asia, for a total expatriate experience of 20 years.

Louie was working on a construction project, maintaining a consistent PJ relationship. His PO relationship shifted when he was required to assume more responsibilities when he became the supervisor in Antigua. He had difficulties with the slow pace of the workforce and had to adjust to them, as he could not change their

culture. The new culture, accompanied by the challenge of the local dialect, presented a new PE relationship, which required Louie to apply himself. A PE difficulty he recounted was the feeling of “island fever” in Antigua, in spite of the fact that he sometimes visited nearby islands.

Brad was transferred to London to continue his duties, (attorney working on banking regulations and contracts), therefore, maintaining his PJ and PO (working for a branch of the same bank) fit. Despite that, the PE fit was different enough, regarding the cultural conventions, in dress, behavior, and speech that he was required to make conscious changes to adapt and fit in. Brad demonstrated cultural intelligence during this process. Brad was sufficiently culturally sensitive to discern the differences between the behavior and dress in his home office in the United States and the London office. When he returned home and continued the liaison with London, he was able to draw on his insights into the London office culture and operations to be of greater assistance.

Ellie also maintained her PJ (attorney working on contracts) and PO (working for the same organization) fits as she was transferred from the United States office to France to continue in her work in contract negotiation, adding international trips. Although the office language was English, the PE was not a fit in France. Several of Ellie’s colleagues were transfers from the home office, creating a small expatriate community. Following her marriage and transfer to Scotland, she became embedded in her new family structure while continuing the PJ and PO fits.

As a senior manger Allison was able to maintain the PJ (performing the same duties) and PO (working in branches of the home office) fit while she was working

abroad. The various local cultural traditions had strong influences on office operations. Allison learned the customs of the different offices using cultural intelligence, to adopt new training materials for each location. The various PE fits were not difficult for Allison, an experienced traveler. Nevertheless, she did experience occasional social isolation as a single person. She also did not participate social activities that centered upon heavy drinking in Australia and London.

Gabriel was the classic expatriate story. As a senior manager he was sent to London (no language adjustment) with expanded responsibilities. Therefore, he experienced both some PJ and PO adjustment. Supervising 22 different national managers was a large PE adjustment. Gabriel employed cultural intelligence to interpret their communications, asked numerous questions, and expanded his listening skills. His family enjoyed the support of living in an expat community; his children attended the International School, and his wife was active in the American Women's Club.

Frank was transferred abroad to open new markets for an international company, extending PJ and PO fits. The environments however, in both Bahrain and Belarus, were very different from the United States and each other, requiring substantial adjustment for himself and his spouse, Lucy. In Bahrain they lived in an expatriate compound. Self-contained expatriate communities exist in some countries where expatriates and their families can live. This situation may be due to cultural or economic differences. They provide a safe environment, a "home away from home" for the expatriate community (Lauring & Selmer, 2009, p. 1452). Most of the people that Frank worked with were also expatriates from all over the world, in different work categories. Lucy enjoyed social

activities with other expatriate women and local Arabs. In Belarus, the situation was quite different; the same job responsibilities maintained the PJ fit, but complexities in the local rules and regulations made the PO relationship more challenging. The environment was completely different (PE) and presented numerous difficulties related to logistics.

Fortunately, Frank and Lucy were mature individuals, and they experienced the entire experience as an adventure. Socially they enjoyed the Russian culture. They learned some Russian for social events, but Frank depended on interpreters for professional activities.

The three English language teachers had different experiences, resulting from their histories and goals. Marie, as an experienced teacher and relatively fluent in Chinese, had a smooth transition from Taiwan to China regarding PJ and PO fit, although the PE was an adjustment due to the political climate in China, and the differences in the Chinese language. She exhibited cultural intelligence in her interaction with her students and the Chinese culture as she strove to understand them and adapt. She was teaching graduate courses, requiring critical thinking, which was in opposition to the climate in China at that time. Craig, on the other hand, was a new teacher, so the PJ relationship was an adjustment. To prepare, he took a short-term teaching position in Korea before he went to Japan for his University position. The Korean experience equipped him with skills and confidence. He arrived in Japan already being semi-fluent, accelerating his PE adjustment. Being recruited from a University in the United States he was comfortable in the academic environment, assisting the PO fit. He was highly motivated to assimilate into Japanese culture, to the extent possible for a foreigner, and utilized the strategies of cultural intelligence to that end. Employing the stages of social learning theory (Bandura,

1977) Craig improved his Japanese language and assimilation into the local culture. Ted had spent some time in China teaching English in an informal situation, supplying some experience before being sent to Vietnam. That experience, coupled with his master's degree in teaching English (TEFL), facilitated his PJ fit. On the other hand, he had no foreign language proficiency, making it difficult to interact with the local population. Ted needed to rely on his English-speaking students and his liaison at the University, thereby leaving him with a PO minor adjustment and a PE challenge. His desire for physical activity motivated him to get a bicycle, which he rode daily, and go swimming in the nearby river. This familiar and important activity made a substantial contribution to his PE adjustment, which was also enhanced by his neighbors' acceptance into their community and activities such as showing him how to sweep the street.

Peter's experiences abroad, both in Italy and Jerusalem, were in the context of the Church and religious activities, therefore, the PJ and PO fits, although were different in structure, were congruent, and even extended into the national culture (PE). He was seen everywhere as a spiritual representative. He used his cultural intelligence to adapt to the local culture in Jerusalem, spending much of his time interacting with the people and becoming a part of the community. "I've been to Gaza, I've stayed with a family in Gaza, I mean it's bombed out, there's electricity four hours a day; those were two of the most luminous days of my two years in the middle east."

Gary's took a teaching job in India, good PJ fit, but his experience required strenuous adjustment to the Institute, PO, and the local environment, PE, "I didn't go in with any expectations, so I took it as it was, but it was a very hard adjustment. I figured it

out, but it was a crash course.” Using cultural intelligence to navigate the wide differences between India and what he was used to in the United States, Gary experienced a personal transformation, leading to him becoming a global citizen. “When I went to India, they didn’t know who I was, they didn’t know who an American was supposed to be, and that gave me the opportunity to re-define what I was.”

Almost every participant found their experience difficult in various ways, nevertheless, satisfying in the end. Every participant considered their experience a success and recommended it to others. Louie even went so far as to say that – “even if you tried it and hated it, at least you tried, for what we regret when we get older are the things we didn’t do.” Craig’s experience was such an overall success that the only difficulty he reported was losing his job suddenly, but he found another one, and remained in Japan another year. Ted was asked to teach courses and design workshops in which he had no experience. It was only due to his good fortune of meeting another experienced teacher who assisted him by sharing teaching materials that he was able to meet those challenges.

Social Identity

The dual issues of learning and identity were always present for the expatriate. Becoming an expatriate added another layer to the personal identity of the individual, and to that individual’s other social identities, such as: profession, family affiliation, and other group affiliations. Social identity theory (Walker & Lynn, 2013) helped to explain key factors in the expatriate experience in the transition from living in one culture or society to living in another. The theory focuses on the relationship between the

individual and the group and institutions, and how institutions shape behavior (Walker & Lynn, 2013), including how language differences separate the expatriate (as out-group members) from the host country nationals (HCNs) (Zhang & Peltokorpi, 2016, p. 1449). Language use is fundamental to social identity, and communication within the group reinforces this identity (p. 1451), in contrast to personal identity, which is displayed in interpersonal interactions (Brown, 2000).

Social identity was presented in different ways by the various participants; depending upon their circumstances. All expatriates become members of a new group and shared a unique bond as expatriates. There were examples throughout this group of participants describing their interactions with other expatriates and membership in expatriate groups. All the participants focused on their occupational roles as social identity, those with families incorporated that into their identity. There were both single and married people. Expatriates also gathered with other expatriates or became members of American Women's Clubs. Children also attended international schools.

Gabriel, as an executive in a multi-national company, was assigned to be President of Europe, the Middle East, and Africa. He had a strong professional identity. His family was embedded in an expatriate community with many other Americans, reinforcing their core social identity as American expatriates. Louie enhanced his social identity as a construction professional in his overseas assignments as he learned new methods and increased his skills, advancing from a carpenter to a supervisor. Both Denver Dave and Waldo had strong social identities as professional engineers, which remained their core identity, and advanced to become managers, as they worked overseas

for 20 years. Both Denver Dave and Waldo were accompanied by their families. Brad had a strong social identity as an attorney with his bank for 15 years, which he transferred to his assignment in London. Being grounded in his professional identity, and being sensitive to his American identity, allowed him to make changes in dress and manners to match the environment in London. Frank's social identity as a plant manager professional was strengthened through his two overseas assignments as he gained substantial experience. His spouse was along reinforcing his family identity. Allison, as a supervisor and manager, following schedules and procedures, maintained her social identity as manager during her work in different company offices.

Ellie, as an attorney, had a strong social identity, which carried over to her overseas assignment as a contract attorney. At the same time, during Ellie's two years in France her social identity focused on being a young (30's), single, expatriate, and her social life revolved around going out with other young, single, expatriates. In Scotland, her social identity changed to that of a married woman and her activities, outside of work, revolved around her new family. She also became involved in the International Association of American Women, where they produced Thanksgiving dinner. Lucy, Frank's wife, was involved in the American Women's Club in Bahrain. Lucy also volunteered with a charity that supported orphanages caring for disabled children, and she and an Australian woman taught English to some village girls in the 5th and 6th grades. In Belarus she was involved with a group of other women expatriates and participated in local cultural activities and gathering with Russians.

Craig developed a strong identity as a teacher, and he adopted some Japanese attitudes such as greater respect for the environment and social graces. At the same time, he maintained familiar connections with the United States through playing extreme Frisbee on Sunday afternoons with other expatriates. Craig exhibited American individualism by asserting his need for a quiet domicile and changing real estate agents, over the Japanese custom of behaving in a face-saving manner.

Marie's social identity as a teacher and Chinese scholar became more substantial as she continued to study Chinese language and culture, making it a fundamental part of her self-identity. This identity was expressed in her story about negotiating a bicycle accident in China with a woman involving a crowd of on-lookers. Craig and Marie had significant change in their social identity, learning the languages (Japanese and Chinese respectively), and adopting cultural ideas. Their experiences as expatriates altered the direction of their lives.

Craig returned to work in the United States and is planning on retiring early and living abroad, which was a new possibility he realized during his travel abroad. He recognized that he did not have to spend his life working for someone else, wearing a suit and tie, to be successful, expanding his perspective of being a man.

Gary transformed his social identity evolving from being a person who felt pressure to fit a certain mold, to being a "citizen of the world" with flexible behavior options. He reinforced this experience by living abroad several months every year since his first expatriate assignment. Peter, representing the Church in both of his trips abroad, strengthened his social and spiritual identity through his experiences, which informed his

subsequent work in the Church when he returned to the United States. Ted developed a strong social identity as a teacher during his time overseas and found his time in Vietnam to be so satisfying that he continues to live there several months every year.

The other participants maintained their professional role as their social identity in a variety of settings even while they were expanding their world- view. Frank and Lucy have retired, so have Waldo and Dave, Louie does some contract work, Gabriel changed jobs and leveraged his increased skills in building an international company, Ellie continues to work as an attorney with an international company, Brad still works on international contracts with his bank, and Allison works in the same field as a senior manager.

Social Learning Theory

Social learning theory (Bandura, 1977) is composed of four factors that can be applied to the cross-cultural expatriate experience: 1) attention (to the behavior); 2) retention (of the actions and language they observe); 3) reproduction (of the language and behaviors they have observed and remembered), and 4) motivation (the desire to reproduce the behavior to produce the desired result). For the participants enacting social learning theory often meant asking: What behaviors does one need to learn to be effective in working with other cultures to achieve the goals of the organization, or personal goals? For the expatriate sponsored by an American home office, there was a need to behave appropriately in the foreign environment in order to be effective.

Gabriel was motivated to be an effective international manager, overseeing 22 different national groups. To achieve this, he paid close attention and learned to listen and

ask questions to understand everyone's point of view. He remembered what was effective in his inter-cultural communications and became effective at reproducing the behavior. He became successful in his position and gained increased confidence in his international business abilities.

Brad, in the London office, paid attention to his office environment, responding to the subtle social cues, and adopted the speech (more reserved), mannerisms (more restrained), and dress (more refined) appropriate to his environment to fit in. He used his cultural intelligence to observe what behavior was appropriate. His behavior also illustrated the stages of social learning theory in his motivation, his attention to the behavior of his colleagues, the retention of their behavioral interactions followed by the reproduction and his adjustment to feedback (Bandura, 1977), allowing him to make the necessary adjustments to be successful in his work environment.

Allison maintained her identity as a manager and exhibited social learning theory as she incorporated her knowledge of the different operational procedures and traditions exhibited in the offices in Sydney, Hong Kong, Japan and India, improving her ability to communicate with the workers in these offices and informing her development of computer systems and training documents for these various offices. Each office required specific approaches to different working schedules and work attitudes. Further, Allison developed patience in her interactions with employees in these other offices. Illustrating this approach, she said, "There's no use in getting yourself in a lather because it wasn't gonna change, they're gonna do it this way."

Frank and Lucy exhibited social learning theory in their interactions with the local population in both Bahrain and Belarus to gain acceptance as they engaged in local cultural activities. Lucy remarked on the difference between spending more time with people in her expatriate communities or with host country individuals, and Americans. She makes a comparison with the time constraints in American interactions, illustrating with a story of having tea with some guests at her house for an entire afternoon and into the early evening. Louie exhibited social learning theory in his interactions with his workers. He had to learn to understand their version of English (*BiWi*), to motivate them to work more efficiently; they worked more slowly than the workers in the United States. Louie was culturally sensitive enough to realize that he did not want to make them uncomfortable by showing he did not understand them.

Waldo exhibited social learning by his approach his first day at work, “I had to be a sponge. You have to sit with the people and learn their culture.” He did not go in telling them what to do; he listened to the workers and learned their language. Denver Dave spent 20 years working overseas for the same company as an engineer. He became very adept at managing the HR paperwork when transferring from one location to the next, and often had a better knowledge of what was required than the HR professionals who had no overseas experience.

Gary’s story is interesting. He started his expatriate experience in India, where he returned for several years before branching out to Thailand and China. He has turned his attention to becoming a “global citizen” and building a global business. He has not learned any foreign languages. It appears he is using social learning to adapt himself to

the different cultures he lives in. He commented that, as a foreigner, he is not expected to behave like the locals, so he has some degree of freedom.

Craig's goal was to become a "regular, normal neighbor" in Japan. To this end he interacted with the locals, learned the language and customs, adapted his behavior, and became a regular customer at the local restaurant through the steps in social learning; paying attention to the environment, adapting his behavior, receiving feedback and improving, as he was extremely motivated. Marie was highly motivated to learn more about Chinese culture and language; she also employed social learning strategies to accomplish this goal as she interacted with her students and the local villagers.

Ted's social identity as a teacher strengthened in his first professional teaching job in Vietnam. His concerns about being an American (i.e. the Vietnam War) were alleviated as he learned that the Vietnamese considered the war their success. As he chose to live in the village, he demonstrated social learning by observation and participation of his neighbors, without knowing the language. His students were helpful as they could speak English. He has become so comfortable in the culture that he continues to live there a part of each year.

Peter, during his time in Jerusalem, became embedded in the culture through his work. He adapted himself to his surroundings and accepted the hospitality of the local people. He was widely known and accepted as he participated in cultural activities. His experience was unique in that he represented the Church and was engaged in taking visitors to visit religious sites; his social identity and work were completely congruent. His spiritual life sustained his open attitude to the culture.

Ellie demonstrated social learning as she adapted to her various workplaces in France and Scotland; and her new family with her Scottish husband.

Self-Efficacy and Locus of Control

The findings support the idea that all the participants demonstrated a high degree of self-efficacy; regardless of the challenges or difficulties they encountered. “An efficacy expectation is the conviction that one can successfully execute the behavior required to produce the outcomes” that an individual seeks (Bandura, 1977, p. 79). Self-efficacy may facilitate expatriate adjustment (Black & Oddou, 1991b). Locus of control joins self-efficacy as one of the traits in a person’s core self-evaluation (CSE), which influences the individual’s relationship to the foreign environment (Johnson et al., 2002). When a person perceives that they have control over, or an effect upon, external events, they are said to have internal locus of control. If they perceived external events to be outside of their control, and they are affected by outward circumstances, they are said to have external locus of control (Rotter, 1966). Each expatriate participant demonstrated these qualities of self-efficacy (Bandura, 1977) and locus of control (Johnson et al., 2002; Rotter, 1966). Each participant continued until the project was complete, no one returned early, many extended their stay, and they all considered the expatriate experience a success.

Gabriel demonstrated locus of control and a sense of self-efficacy in managing his difficulties. First, upon arriving in London the company had arranged a service to find him a home, but they were inept, so Gabriel found one on his own, and instituted that system for others to use in the future. Next, his mentor quit in his home office and

Gabriel had to make 18 trips back to the United States to keep his team together. After returning to his home office he did not feel satisfied, he became “rather bored” and “left to get more independence” after three years to develop another international company. He increased their sales from \$4 million/year to \$80 million in only four years.

Brad demonstrated locus of control and a sense of self-efficacy in his impression management as he adapted his speech, mannerisms, and dress to fit into the London office. Further, the difficulties he had in the beginning of his term in London, no internet for 6 weeks, no cell phone, insufficient household furnishings, he not only solved these problems by supplying what he needed, advocating for himself to obtain what he needed from the office, and he continued on to develop an expatriate support program for those that came after him.

Ellie had a relatively smooth transition into her new position in France. Her first challenge came with her realization that she had to find a new apartment, which she did on her own, and then enlisted her friends to help her move. She demonstrated self-efficacy and locus of control in her handling of her moves; within France and then later when she transferred to Scotland. She gave up internal control to her company while in Scotland as they moved her around to different office locations. That was the price for advancement in the company. “You know if you wanted to get ahead in that company, the company looked at you and they put you where they wanted to put you and so they put you in other divisions.” Sometimes she had to live in another town and was home with her husband only on the weekends.

Ellie re-established an internal as locus of control when she left that organization for another one. Then she and her husband quit working and traveled for a year. Following that she found another job in Scotland that eventually returned her to the United States to open a new office, which she was to staff and manage, again demonstrating her self-efficacy.

Allison was sent to various foreign offices with various cultural traditions and work habits, and she was able to adjust with little difficulty, her story demonstrates a strong sense of self-efficacy and locus of control. When she was sent to Australia, her company did not help her find a place to live, and she actually had to rent a car, and take public transportation to search for an apartment. She went through a couple of living situations that did not work out until finally moving into a woman's residency. She had to find her own place again in London, and again when she moved out of London.

When she repatriated from her assignment in Hong Kong, her home office did not have a position for her. However, they did agree to ship a number of her belongings back from Hong Kong. She also did not have a place to live. So, she traveled for a few months, returned home and started a new job. She handled every challenge.

Frank and Lucy's time in Bahrain was well structured and protected as they lived in an expat compound. Frank had the anticipated work challenges in opening a new market; and Lucy used some of her time to do charitable work. Their time in Belarus was more challenging as the economy was under developed, their living conditions were difficult, and the bureaucracy was complicated. They did what they could and accepted the rest as an adventure. Sometimes the locus of control was within them, and sometimes

it was external in the country culture and laws. The fact that they were able to function in extremely different situations shows a sense of self-efficacy.

In Antigua, Louie found himself in the unexpected position of supervisor of his construction company without experience and preparation. He had to find a way to succeed and demonstrated internal locus of control as he took on the challenge and increased his self-efficacy as he succeeded. He felt that experience was a sort of coming of age; he was in his late 20's at the time.

Denver Dave exhibited strong self-efficacy; he worked long hours, generally from 6:00 a.m. until 6:00 to 7:00 p.m., enjoyed his job, and was willing to travel to various locations. Dave moved so many times that he learned what HR materials and forms were needed, often he knew more than the HR department. Further, the fact that he worked abroad for 20 years shows he was confident in his abilities and could manage diverse cultures and situations. He continued to work until he was 69 years old.

Waldo was responsible for building and running a manufacturing plant in the Dominican Republic, which made it necessary to understand a different culture and learn how to best manage them. This presupposes a locus of internal control and strong self-efficacy. He was able to meet his responsibilities and even took the plant to a higher level of functioning where they reached an error rate of zero.

Ted took an assignment to teach English in Vietnam, he had some previous teaching experience and no foreign language proficiency. He was located 200 km from his main support, the Embassy in Hanoi, and he was dependent on one connection at the University where he taught for help in every day functioning. He was required to create

workshops and trainings for which he had no experience; fortunately, he had an English mentor he met in Hanoi who assisted him. His first three months were difficult on every level, and he reached a crisis point one night when he was home in a large rainstorm and the power went out in his house. He had no phone service and did not know what to do. At that point he wanted to go home. "I was thinking, I can't do this, it's just too crazy, and then I realized that if I didn't do it I was gonna lose my stipend and I really couldn't afford to quit, so I thought I've just got to make this work somehow you know."

He described this as a turning point in his life. He got a bicycle, rode to the river to swim, and made himself take the train alone to Hanoi to visit his English friend. This demonstrated a strong internal locus of control, and a strong belief in his self-efficacy. He followed through with his plans. He continued on to create different courses and workshops, and, after two years in Vietnam, he was sent to Bangladesh to train teachers.

Craig went to Japan with some language proficiency, and little English teaching experience. He was determined to be successful in his work and in becoming a part of the Japanese culture. His attitude of self-efficacy and internal locus of control is illustrated by the steps he took to achieve his goals. First, he took an informal teaching job in Korea to prepare himself for Japan. He took control of his housing situation by changing real estate agents. When he lost his job suddenly, he simply got another one and stayed for another year. At the end of his teaching in Japan, he traveled for a year before returning to the United States.

Marie went to China with prior teaching experience and language proficiency; she had spent time in Taiwan. Mainland China was just starting its economic boom, and was

still poor at that time, and the language was a little different. She was the first foreign teacher her students had experienced. She had to create her teaching materials from lessons they received in their other classes, demonstrating strong internal locus of control and self-efficacy.

Gary went to India thinking he would be taken care of by his employer at the Institute, exhibiting an external locus of control. He was so overwhelmed by his circumstances that he could not really advocate for his needs being met. Asking about setting up his household, he replied, "I was in crisis, I did not set it up so much as I tried to survive my first time abroad in India." He did not give up, "I became a stronger person, emotionally, because like I said it was really challenging, there are other ways to do it, and you could adjust to just about anything." Gary regained his internal locus of control sense of self-efficacy.

In Peter's first trip abroad, sent to Italy by the Church, he experienced an external locus of control. He had taken vows of poverty and was not permitted to have a bank account; he had to ask for money when he needed something. He showed some internal locus of control by seeking out locals to practice Italian. Years later, when Peter was in Jerusalem, he was provided a place to live by his employer, and his work procedures were ambiguous, creating a sense of no control. Nevertheless, he did perform his duties and in the process, became part of the community, making good friends, and showing strong self-efficacy in his relationships.

Repatriation

Repatriation in this study was examined for the amount of organizational support in the process of returning from the foreign assignment to the home office or another base of operations in the United States. The individual characteristics of the expatriate, as well as the degree of organizational support, influence the adjustment (Aycan, 1997). The organization's role in the repatriation process is a significant factor in this adjustment, and this includes the utilization of the expatriate's newly acquired skills (Santoso & Looseman, 2013). The re-entry process is generally more difficult than anticipated, and the expatriate needs time to readjust (Santoso & Looseman, 2013). A repatriation plan is advised (Santoso & Looseman, 2013). Such a plan would utilize the acquired skills of the expatriate while reintegrating them into the home office, as well as allowing the individual to disseminate these skills throughout the organization (Santoso & Looseman, 2013). In this study, any sense of a repatriation plan for this process was generally absent even with the large multinational companies.

Only one company utilized the skills of the expatriate. Only Brad was fortunate enough to continue to be a liaison with the London office. He visited them a few times during the following years and maintained a business connection. His experience was the exception.

Gabriel was a classic example of the experience of repatriation frustration. He had a high degree of internal locus of control while he was managing 22 national managers. He described his repatriation experience. "I had learned new skills abroad yet I had not been given full credit when I re-entered." His response resulted from the inability of the

organization to use the newly acquired skills of the expatriate. Gabriel left the company after three years for a more challenging position.

On the opposite end of the spectrum, Allison returned to her company after being overseas and was told that there was no longer a job for her. Louie was returned to the United States after his projects and had to find work on his own.

Ellie returned to the United States by her new employer with instructions to set up a new office, in a new location, with little support. Denver Dave retired after his last assignment and simply returned home. Waldo quit his job while overseas for to family reasons. None of these individuals received debriefs, or any re-entry counseling. Craig traveled for a year before returning home, Marie returned home after her teaching assignment was complete, and Gary returned home after his assignment and found a new job. Ted was repatriated to the United States by the State Department, but there was no formal debrief. Peter returned home on his own after Jerusalem; he was invited back to service in the Church.

Culture

There are various visible and invisible components of culture that can be examined for their influence and effect on expatriates. Visible influences, such as a country's institutions and structures, the laws, rules, and customs, are visible and can be followed. Other visible differences such as identity, language, and religious beliefs of a culture also have effect on the expatriate (Hall 1976; Hofstede et al., 2010). Less visible cultural concepts such as assertiveness *versus* modesty, and gender roles of male *versus* female, can vary greatly between the United States and more traditional cultures. The

less visible concept of high and low context cultures can also have a profound effect on the expatriate. In high-context cultures, much of the communication among the people is understood and takes time to learn and internalize, just knowing the language is not sufficient to understand communication (Hall, 1976, p. 91). Japan is an example of a high-context culture. In low-context cultures, like the United States, the communication is delivered explicitly in the language; without requiring an internalization of subtle cultural cues (Hall, 1976, p. 101). Another major polarity examined in culture studies is the individualism-collectivism concept (Hofstede et al., 2010). According to this theorized dimension, Americans are extremely individualistic, relative to other cultures (Hofstede et al, 2010).

Organizational support in the form of cross-cultural training and in-country support, including a mentor to facilitate navigating the unfamiliar cultural environment, can provide substantial support and clarity for the expatriate. The components that appeared in the narratives of the participants related first and foremost to language. Other elements such as proxemics, power distance and time management were also mentioned. Louie also mentioned environment--the heat in Thailand--as difficult.

While language is basic to culture and social identity (Zhang & Peltokorpi, 2016), most of the participants in this study did not experience difficulty with the language element. Gabriel, Brad, and Allison worked in London. Ellie worked in Scotland. Allison's jobsite in Hong Kong was in an English-speaking office, and Ellie in France was also in an English-speaking office. Denver Dave, Waldo, and Frank worked for large international American corporations. So, no matter where they were, the office

language was English, and they depended on translators for business interaction with the local population. Louie's work in Thailand was carried out in English, but his job site in Antigua presented some difficulties, requiring adjustment to the local English (*BiWi*) dialect. Craig and Marie both taught English and studied the local language. Gary was in English-speaking India, and he did not learn the local language.

Allison mentioned the element of proxemics in her comment on the crowding in Hong Kong, which she found "oppressive." Louie experienced "island fever" while he was on Antigua comparing the islands smallness, relative to the size of the United States.

Allison addressed the concept of power distance (Hofstede et al., 2010). Asian cultures have a greater power distance between the boss and the workers than in the United States. In Japan, they had a traditional procedure to track shipments. Although Allison showed them a new system, using the computer, and they agreed to do it her way, because she was "the boss" while at the same time they also continued to do it the way "they had always done it."

The topic of time management surfaced a few times. Allison, working in Sydney, found herself working shorter hours, until about 4:30 p.m. Transferring to Hong Kong the workday was from 9:00 to 6:00 p.m., and every other Saturday. In London, Allison and Brad found many Englishmen left work around 5 p.m. to catch the train home to the suburbs. Denver Dave, who worked many weekends all over the world, found the French were not permitted to work on the weekends. Louie, in Antigua, found the workers were very slow, he had to adapt to their work pace.

Organizational Factors

Organizational factors were limited in most cases for these expatriates. Cross-cultural training and housing assistance were the adjustment support provided most often by host-country organizations or multinationals. One major contribution the organization can make to the expatriate adjustment is the provision of cross-cultural training prior to departure, and/or in-country support. Of the participants in this study, Gabriel was one of two who received pre-departure cross-cultural training; a four-hour briefing for himself and his family. Ted received an orientation in Washington, D.C. by the US State Department, and again at the American Embassy in Hanoi.

Housing logistics are more difficult to manage in a foreign environment, and it is one factor that can easily be provided by the organization's foreign office. Nevertheless, this was not always the case. Support ranged from complete to no support in the case of Allison in Australia. Allison's local offices set her up with a service apartment in Hong Kong until she could find housing, with which they also provided assistance. Louie was set-up in a hotel with room and board; Craig, initially housed by his employer; Marie, set up in a dormitory, Peter in a Monastery in Italy, and in Jerusalem, his employer's family home.

A common strategy was to provide the expatriate with a relatively furnished apartment, as in the case of Brad in London, or to connect them with a relocation service, as in the case of Gabriel in London. The real estate agent, who assisted Craig in Japan, followed the proper procedure for the Japanese culture, and demonstrated the necessity of following local customs in such affairs. Although Ellie was assisted in obtaining her

apartment in France, she was not advised on the proper location, and had to move. Gary was housed with his employer, the Director of the Institute, upon arrival, but his local housing turned out to be challenging in many respects, reflecting conditions in India at the time. Ted found housing with assistance from his University liaison. Waldo and Denver Dave had generous stipends from their multinational company and often lived in expatriate communities. Frank and Lucy lived in an expatriate compound in Bahrain, in contrast to the conditions in Belarus where they lived in a hotel for a year before finding an apartment with the help of a Russian friend.

In the US Peace Corps, we were provided a move-in stipend to accompany our monthly wages and were sent out to our communities to find housing on our own. However, since we were provided with language and cultural training, it was not difficult. Just like in the United States, I found an apartment, had the power turned on, went to the local market and bought furnishings etc. I moved apartments a couple of times, to a better neighborhood, and hired local services to move my belongings.

Individual factors and social support. Open-mindedness, social skills, and self-confidence were important aspects of the expatriate adjustment to living in a different culture. These constructs were exhibited by each of the participants. The other factors that were important to a successful assignment were the person-job fit, the person-organization fit, and the person-environment fit for the individual. Open mindedness, social skills, and self-confidence have been associated with successful managers (Oddou, 1991). Further, the person-culture fit has been conceptualized (Parkes et al., 2001) as another dimension in the question of the expatriate experience. Not only the individual, but also the social support system is crucial to the expatriate experience (Selmer, 2001).

Personality traits have been evaluated as predictors in the expatriate experience (Black, 1990; Church, 1982; Mendenhall & Oddou, 1985), and person-environment fit included the person/job, the person/organization, and the profession (Makraiova et al., 2013). This included support of the spouse and children who may accompany the expat on the assignment. There may be social support supplied by the host country nationals, and other expatriates (Johnson et al., 2002; Osman-Gani & Rockstuhl, 2008). All these factors came into play with these participants. Some of the expatriates built a social support network either with other expatriates, or through American Women's clubs, organizations and international schools. Others developed deep friendships with the local population, many through their workplace.

Gabriel and his family were living in an expat community with 60% Americans, the children were in the international school, and his wife was active in the American Woman's club with hundreds of women; the family enjoyed substantial social support.

This social support came mainly from the expat community. Yes, they encountered some health problems and a couple of the family members had to return home for treatment. Gabriel's personality was open-minded and he "enjoyed the chance to lead a business team on such a vast variety of cultures," supporting a good person-environment fit. Gabriel used his cultural intelligence to listen and he learned about the significant cultural differences among the various cultural teams he managed.

Brad was a single man in London; his outgoing personality allowed him to enter the social life of his peers. In the office, he used his cultural intelligence to moderate his behavior to match the British reserve. He was careful in how he requested things, "Let's just say things did not go as quickly as I would have liked, but you have to be sensitive to the fact that you don't want to be the ugly American, right." The ethnocentrism that he experienced led him to feel he was expected to conform to their organizational culture in terms of dress, mannerisms, and formality in his speech, which he did. At the same time, he found everyone to be nice and genuine. He made some long-term friends.

Ellie was a single woman in France; her social support system was expatriates from her home office and other young colleagues. When she was married in Scotland to a native, her social life revolved around his family. While working in the United Kingdom she became involved with a charity, the International Association of American Women. She received no cross-cultural training, but she was open-minded and appreciated the opportunity to work abroad. She enjoyed most of her postings, although she found the dark and rainy weather in Scotland difficult. She enjoyed the slower European pace of life.

Allison had traveled abroad prior to her job postings, so she was comfortable in foreign environments. She did have difficulty adjusting to the heavy drinking culture in Australia and England. She was not interested in going to bars alone as a single woman. Her colleagues in Hong Kong included her in social activities. She stated, “So I think going on your own is a bit difficult, and you have to be pretty strong-willed and willing to break in and try to do different things.”

Frank and Lucy had little trouble adjusting to the environment in Bahrain. They were living in an expat enclave, and many of their social activities revolved around the large expatriate community there. Lucy also became involved with the local Arab women and attended their festivities. She was a member of the American Women’s Club, and they had parties as well as charitable activities. Frank and Lucy attended church services on abandoned refinery grounds in Bahrain that were overseen by an Australian of high ranking in the country.

In Belarus, Frank was busy with his project. Lucy learned some Russian and had good friends who were Russian. They attended many of the classical Russian cultural events: the ballet, opera, and classical music. She also had friends within the expatriate community, some of whom were living in her apartment building. Frank and Lucy were able to visit the Baltic States and Europe.

Louie was open-minded in his postings. The person-environment fit challenges he related were the feeling of “island fever” in Antigua, and the extreme heat in Bangkok. He found sufficient social support from both his environments, the people in Antigua

were very friendly, and the other workers and the Germans in Thailand were very supportive.

Denver Dave exhibited strong self-efficacy; he worked long hours, enjoyed his job, and was willing to travel to various locations. His wife was a part of a community of other corporate wives, and she had teaching positions in both Hong Kong and Korea. His cross-cultural training was minimal. He used his cultural intelligence to be “patient and forgiving with the culture” in different locations. He tended to work longer hours on the London project and in France than in some others.

Waldo’s wife and son enjoyed their time in the Dominican Republic (DR). He understood the difference in the politics and felt that one needs patience in the DR because there are stages of government graft and doing things under the table, which is different than in the United States. As Waldo traveled and worked in in other countries, he expanded his world-view.

Ted was single in Vietnam, and his social life centered upon his teaching. He enjoyed his time as an ESL teacher, he said it was the best job he ever had. His experience fulfilled a dream he had when he was young, to travel and see the world. He grew as a person and expanded his view of the world and himself. He was fortunate to have two individuals who assisted and mentored him, which contributed substantially to his success. One helped him find a house and navigate details of everyday life in the village, and the other helped him develop teaching materials.

Craig was a single man in Japan. He was not only open-minded, but also very interested in the Japanese culture. This created a strong person-environment fit. He

recognized the rigidity of the culture, but it did not really limit his experience except for the fact that as a non-Japanese he would never be able to become a full professor in a university. Meanwhile, he found an expat group of extreme Frisbee® enthusiasts with whom he could play on Sundays, and that group provided strong social support.

Marie's interest in Chinese language and culture created a strong person-environment fit. This was not without difficulties as the political situation in China is very different than the United States. Nevertheless, she maintained a politically neutral attitude while teaching, focusing instead on critical thinking and scholarly writing. Her husband was with her, which provided a strong individual social support. She made friends with other teachers and locals in her explorations of Chinese culture.

Gary's open mindedness when he travelled to India was substantial. He was interested in Vedanta and wanted to learn about authentic Indian culture. He immersed himself in his environment, to the point where he did not always take care of his own basic needs. He expected that his employers were going to take care of his basic needs more than they did. However, he did not let them know what he needed all the time. His experience in India was transformative; "...that expanded my sense of the human condition and how we can survive it" relating to the poverty he found there.

Gary has become a global citizen. "...Other places aren't different, they're home that I haven't discovered yet. Because by the end of the first six months in India, that was home." The first time in India was so hard; he feels that he can do anything now.

Peter's experiences were based upon his religious affiliation and deep spiritual beliefs. His time in Jerusalem especially affected him deeply and he carries it with him

every day. “And I was so grateful to meet people with such great resilience, I’m North American, middle class, white, male and to see people, men and women thrive and make happy lives with many, many challenges, logistical, many challenges.”

Limitations

My most obvious bias has been that I consider language learning and usage to be a critical factor in the expatriate experience. Without being able to speak to people in their native tongue one cannot achieve strong rapport and a deep understanding of the culture. Nevertheless, there were several participants in this study that were very successful in their assignments without learning the language of the locals. These individuals were working for large, international American corporations who essentially establish a version of American culture wherever they appear. The expatriate lives on an expat compound, around which their social life revolves, or they live on the economy and have primary expat connections. Their expatriate experience cannot be diminished, and their success cannot be denied.

The experiences of Denver Dave, Waldo, and Louie, primarily engineering and construction professions, underscored how effective one can be even if they do not know much of the native language. However, fluency in one language alone can be a limiting factor in exploring the culture more deeply. Ellie, as an attorney, worked in France and did some deals in Turkey and South Africa, all in English. This is partially a testament to the fact that English has become the primary business and international language, which gives Americans an advantage. Gabriel supervised managers from 22 different cultures

and several language groups; however, since all the business was conducted in English his lack of foreign language knowledge was not a factor.

My experience in the Peace Corps was a secure situation. I knew I had the support of the US government and, if anything would go wrong, or if I became ill, they would take care of me whether in country or return me to the United States. There is an advantage for the business to create a strong expatriate support system allowing the expatriate employee to focus attention on his or her job. The participants in this study did not all enjoy such support; nevertheless, they considered their experience a success no matter the difficulties.

There was little pre-departure training in the Peace Corps, simply a three-day meeting in the United States. Our training was a full month in country, six hours a day, which included: language training and practice teaching English. We had cultural training events in the evenings. Concurrently, we had the advantage of being able to interact daily in the culture to practice our learning. This provided immediate feedback for our behavior. This is a good example of social learning theory in action. Every day we practiced our language skills and behaviors, observing others, reflecting on the feedback we received from the locals, modifying our behavior, and continually improving our competence. On this basis, I think in country training, or at least an in-country adjustment period for the expatriate would be useful to orient them to their surroundings.

So many of the participants in this study arrived at their offices and were put to work immediately, no orientation, no time to settle in, and without proper preparation. A

few days could be very useful to the expatriate in this situation. At the very least some preparation could alleviate the time-change difficulties. Finally, I see no reason to rush the expatriate into the job; if they are going to be there for a period of years, a few days could be very beneficial for their settling in. However, many of these participants were expected to dive into organizational work without even being assured of a place to spend the night.

This study contained several other limitations that should be recognized. These limitations related to the lack of diversity of the participants and the narrative inquiry process developed for this study. All the participants identified as Caucasian American, and all participants were drawn from a single large cosmopolitan city in Northern California, with one exception who was from another State. A wider population group, including different ethnic groups, and more females, could generate a more diverse narrative with useful information.

There are some inherent limitations in the use of narrative inquiry for a study of this kind. In particular, the focus on the participant's broad narrative often meant that some details were left out. One interview provided interesting and insightful material, but it seemed that the participants' memory began to develop, and a second in-depth interview might have discovered more relevant material. Finally, most narrative studies like this one use a small sample pool in order to draw in-depth and thick description from the participants. Additional participants could also add to the overall themes that have been presented in this study.

The broad, open-ended questions served the purpose of eliciting the narrative of the participant; and the details that they found significant. However, by allowing the participant to go on tangents and explore their memories of a complex experience, sometimes specific and relevant details were overlooked, such as what kind of preparatory training exactly did the expatriate receive? This can be overcome by follow-up interviews with questions that are specific.

Another limitation is that there were no participants who had failed at their assignment. Failure would provide interesting and useful data for future expatriates to consider, and a beneficial addition to the research literature.

Recommendations for Future Research

Future studies should include expatriates who have failed in the overseas assignment to learn what elements were missing or inadequately explored from any of the diverse categories discussed in this study. The use of only one interview in this study demonstrated that there could have been more useful information gained by follow up interviews. In a similar manner, a pre-interview briefing, suggesting topics to be discussed, could serve to stimulate the memory of the participant and allow time for reflection, creating a more cohesive narrative.

Interview one was broad and allowed the expat to tell his or her personal story. Interview two could focus on specific topics such as culture shock, language acquisition and usage, and behavioral adjustments. These areas were not specifically addressed, although the issues appeared in some of the narratives of this group of participants. Focusing on specific topics would allow for a more direct comparison among the

participants. In addition, more female participants would supply data on the handling of gender issues in different locations.

Some of these participants were at the beginning of their careers, and others were mature and at the end of their professional lives. A comparison of expatriate's experiences at beginning of career and those at the end of their career would be interesting to consider the relationship between maturity and the effect of culture on behavior and attitudes. This proposed focus of research would also require more participants in order to have a large enough generational participant pool to make comparisons of any differences in the narrative.

Additionally, a future study could select participants from diverse backgrounds, cultural and ethnic, to uncover differences and common themes. In this study all the participants were Caucasian. Further, selecting participants from different national groups would provide an even wider view into the expatriate experience. Finally, selecting only female participants would be an illuminating study as well.

Implications for Future Practice

This narrative inquiry produced a variety of impressions regarding the expatriate's process. In general, the growth of interest in cultural intelligence (Earley & Peterson, 2004) illustrated the need for the individual to be flexible and sensitive to his or her environment, as not all situations can be anticipated in country specific training. The cultural intelligence approach focuses on the individual's strengths and weaknesses, developing learning skills, and includes a model of cultural adaptation to promote flexibility, rather than simply country specific training (Earley & Peterson, 2004, p. 101).

On the other hand, there are situations, irrespective of the national culture, that can be anticipated and addressed. The expatriate needs a place to live, to open a bank account to handle their finances, to manage both foreign and home tax responsibilities. Moreover, they will need a proper visa, family support, medical insurance and information on the foreign medical system. Climate and transportation systems briefings are also relevant. A designated in country mentor for expatriate and family on the ground, when unanticipated events occur, could avoid problems, greatly enhance the expatriate's experience, and add to the organization's success. The home office should anticipate everything that will impact the expat before sending them and have a structure in place to manage that. A comprehensive pre-departure consultation can address these and other issues, managing the expatriate's expectations.

The findings of the *Advice* section presented detailed information on what these participants considered would be useful knowledge for future expatriates. The home office, in collaboration with the foreign office, could easily implement many of these suggestions. The stories in this study illustrated how little preparation some of these individuals received before or after their assignment. Brad's example about creating an on-site mentoring group and informing his organization's human resources (HR) department about expat needs in London represented the sole story about organizational efforts to change the situation for expatriate workers.

Furthermore, the repatriation stories presented here demonstrate a significant lack of care for the expatriate in regard to their re-entry shock, family counseling support, and

career development. To achieve a return on investment (ROI) that businesses prize so highly, they would be better served to utilize their expatriates more effectively.

A local mentor in the foreign site can help the expatriate navigate the system regarding logistics such as setting up a bank account, paying bills, local transportation, and where to live. Expatriates themselves can add to the body of knowledge in the onboarding procedures for future expatriates, and they can serve as mentors in the home office.

The home office could prepare a basic information package for the expatriate on the foreign assignment. Covering topics such as culture and history, language, city sites and map, local transportation, and essential facts on their environment; would create a handy guide. The foreign office HR department needs to be well versed in tax law, visa requirements, and the medical system to guide the expatriate.

Implications for Social Change

The workplace is increasingly global. The pressures of competition among international business organizations have intensified the need to select, train, and develop talent (Stroppa & Speiß, 2010). This need carries the urgency of understanding the requirements for a successful expatriate experience (Stroppa & Speiß, 2010), which will affect not only the business but the individual expatriates in terms of financial consequences, reputation, and future prospects (Hechanova et al., 2003).

The emotional intelligence factor been found to play a role in the expatriate's job performance and can be utilized in the selection and training of personnel (Jugindar Singh Katar & Nik Mahmood, 2017). Gabriel's narrative illustrated his emotional

intelligence in handling the managers from 22 different nations whom he supervised in his organization. His increased listening skills allowed them to participate and contribute and allowed Gabriel to accomplish his goals.

Unfortunately, when Gabriel returned to his home office after a four-and-a-half-year successful placement abroad, his new skills, insight, and maturity were not utilized and appreciated. This caused Gabriel to leave his company and take his abilities to another business who benefitted from his expertise. Not only do companies need to support their expatriates in the field, but they also need to incorporate this increased knowledge into the company knowledge base to increase success and productivity.

One of the fundamental units of society is the family. Family support is critical in an overseas assignment when the familiar social supports are no longer present. Executives with families may reject an overseas assignment due to concerns on spousal career loss, such as difficulties finding work or getting a visa (Sheley, 1996). Some international companies have improved their expatriate and family support programs. For example, 3M has instituted a program that supports the spouse before they leave for the overseas assignment, and sees they receive another position at the company when they return (Sheley, 1996).

In an expatriate situation, without family and/or spousal support, a spouse may find him or herself out of a job upon returning and turn this anger towards the company who expatriated the family; this anger will spill over into the marriage and family life at home, causing more stress (Pascoe, 2000). Adding the spouse and family components into an expatriate support program would improve the chances of a successful expatriate

experience. Furthermore, Pascoe (2000) discussed the need to support the family from the repatriating company as they face the challenges of being in a new situation, albeit in their home country, after years abroad in what is generally exciting and interesting locales (Pascoe, 2000).

Several participants in this study described the difficult adjustment process upon repatriation, and each devised a strategy to manage this. Ellie needed almost two years to adjust to being in the U.S. after 10 years abroad. Gary managed his repatriation by making it temporary, as he started his lifestyle of spending six months each year abroad, Craig changed his life focus and plans on retiring abroad, Marie deepened her relationship with China and continued to study and work within the culture, and Ted fell in love with Vietnam and is spending most of his retirement in the country.

One substantial social implication of the expatriate experience is not only the expanded world-view of the expatriate, but the sharing of this experience when they return to their home country (Montuori & Fahim, 2004). This sharing informs the social community as well as international business groups. Molinsky's (2007) discussion of cross-cultural code switching, "the act of purposefully modifying one's behavior in an interaction in a foreign setting in order to accommodate different cultural norms for appropriate behavior" (p. 624) can contribute to the body of knowledge in the increasingly global corporate environment. This knowledge can place the repatriated individual in a position to become a mentor to future expatriates, and a contributor to the development of the expatriate training and support program of the company. This role is exemplified by Brad in this study who, by being the first expatriate in the London office,

became not only a mentor to those who followed him but also worked with other expatriates in the office to guide HR in a more comprehensive onboarding process for future expatriates.

Conclusion

This narrative inquiry examined the stories of 13 corporate-assigned American expatriates (and one spouse) who had completed the expatriate cycle, from going abroad to returning home. The purpose of the study was to gain a deeper insight into the overall experience of the expatriates, including their selection, expatriation, adjustment, and repatriation. The interview questions were deliberately broad to allow the participants to express the most meaningful aspects of their experiences, in the hope that unanticipated elements would be revealed. Topics covered were: organizational support, living situations, cultural adjustments, professional responsibilities, relationships with the local population, positive and difficult experiences, repatriation, overall impressions, and advice for future expatriates. There was a range of experiences among the participants, which was detailed throughout this paper.

Eight of the 14 participants were classic company assigned expatriates: Gabriel, Brad, Ellie, Allison, Frank and Lucy, Louie, Denver Dave, Waldo, and Ted. Peter was sent abroad by the Church, making his story unique. Craig had been studying Japanese, and had connections with Japanese educators, who offered him a job; Marie had been studying Chinese culture and language for some time when she was sent to China by an American University to teach English; and Gary was interested in Vedanta philosophy, which motivated him to find an educational Institute in India that would hire him to do

educational work. Notwithstanding the fact that these participants deviate from the classic structure, they all were hired while still in the United States and enjoyed the support and services of the organization that hired them. Therefore, it is this researcher's perspective that their stories have made a substantial contribution to this study.

The diversity of the individual's situations includes some similarities. Most notably, none of them received an adequate repatriation. Repatriation failure is a problem for the organization, since they do not benefit from the advanced learning of the expatriate. All of them faced challenges along the way that only through their own efforts and actions did they prevail. No one came to their rescue. Every participant demonstrated self-efficacy and internal locus of control in response to challenges in their environment.

Some expatriates lived on expatriate compounds or in expatriate communities, decreasing the amount of adjustment they needed to make to the foreign culture. Others lived directly in the midst of the local community, presenting more challenges for adjustment.

Social learning theory (Bandura 1977; 1986) was applicable to the expatriate experience, along with social identity theory (Walker & Lynn, 2013). Most expatriates in this study identified primarily with their professional identity, which remained constant throughout their postings. Some of the participants expanded their social identity to include new elements from their surrounding culture. Some returned home with an expanded view of the world, and others returned with an expanded sense of themselves.

The expatriates who received the most comprehensive support from their home office were those who worked for large multi-national corporations that were so big that they carried their corporate culture to their overseas sites. Working for these companies the expatriates lived in expatriate communities around other Americans, the culture being the corporate culture. Some lived in expatriate compounds inhabited by Americans and other nationalities as well. Certainly, they could travel around the region easily, but the corporate culture cushioned the impact of the local culture. The biggest surprise in the results found in this study was the lack of preparation and support for most of the expatriates. Some support was poorly organized, incomplete, or insufficient. There is a gap between what the literature presents and what happens 'on the ground.' Denver Dave gave an example of organizing his own paperwork that he would need when being re-posted to a new assignment; often the HR department did not know what he needed. There appears to be a lack of consistent HR rules and procedures in the international business arena. More research in this area is necessary.

The literature on expatriate research discusses cross cultural training, support in the field, social and organizational, the expense involved with sending an expatriate abroad, cultural dimensions, organizational factors, and personality factors. Those factors are important and relevant. But the details of daily life, housing, having a bank account, getting the daily needs met outside of work, these are important. For an expatriate to be effective at work they need to be able to get their needs met. A basic expatriate support structure put in place would ensure this. Brad tells the story of the early difficulties he had when first moving to London. Finally, his company improved

their procedures, and used feedback from Brad and other expatriates to develop a more complete program to better serve future expatriates. This illustrates a method all companies could use: debriefing their expatriates and gaining useful information to improve their program.

The fact that none of the participants in this study received any kind of debrief upon their repatriation is hard to imagine. They could provide a wealth of information on many topics helpful to the home organization, expatriate support procedures, and foreign office operations. A simple debrief and a standard questionnaire could collect valuable information at little cost to the home office.

The English teachers in the study had close contact with the people and the culture. Marie and Craig became deeply involved with the culture, and proficient in the language. Ted was very involved in his teaching work, but did not learn the local language, he considered that a disadvantage. Peter, in his time working in Jerusalem, did not learn much Arabic, and regretted it. He recommended that expatriates push past their fear and make the effort to learn the language. Ellie learned some French while she was working in France and stated that she wished she had learned more. Not everyone has the interest or facility to learn a foreign language, although for many, being able to interact with local people enhances their expatriate experience.

Most surprising in this study was the realization that self-efficacy and internal locus of control were critical factors in the expatriate experience. This was not emphasized in the literature. This is important finding and could be used in the selection process for expatriates. Returning to one of the basic tenets of organizational psychology,

that of person-job fit, finding the right person for the job, including the characteristic of internal locus of control and a high degree of self-efficacy, might be a substantial part of ensuring expatriate success.

More qualitative studies of expatriates are needed. Different nationalities and cultural groups would offer interesting insights. The literature on expatriate research does not offer solutions, and the experiences of expatriates show that more work is needed.

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Appendix A: Data Gathering Questions

1. Looking back at your experience as an expatriate, how would you describe it in terms of a story line?
2. How did this happen that you were sent overseas?
3. Tell me about your first day in the country.
4. Tell me about your first day at work.
5. How would you describe your experience with setting up your household?
6. How would you describe the changes you went through in the first six months?
7. Tell me about the experiences you enjoyed the most?
8. How would you describe the most difficult experience you had?
9. How did you feel about the organization's role throughout this process overall?
10. How would you categorize your overall success or failure?
11. How would you describe the long-lasting effects of your experience?
12. What advice would you give other individuals going overseas?
13. How can you use your overseas experience to further develop your career?
14. Tell me about the most important impression this experience made on your life?
15. If your experience would be made into a film, how would you describe it?