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The hero's adventure: The overseas experience of expatriate business people

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Case Western Reserve University, 1990

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THE HERO'S ADVENTURE: THE OVERSEAS EXPERIENCE
OF EXPATRIATE BUSINESS PEOPLE

by

JOYCE SAUTTERS OSLAND

Submitted in partial fulfillment of the requirements
for the Degree of Doctor of Philosophy

Thesis Advisor: Eric H. Neilsen

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January, 1990
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(Chairman)  

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Date August 28, 1982

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THE HERO'S ADVENTURE: THE OVERSEAS EXPERIENCE OF EXPATRIATE BUSINESS PEOPLE

Abstract

by

JOYCE SAUTTERS OSLAND

The sojourn literature on expatriate business people has seldom focused on expatriate's subjective experiences of the paradoxes that confront them. The qualitative exploratory portion of this study investigated two questions: 1) Do expatriate stories reflect the transformational nature of the "hero's adventure" myth (Campbell, 1968)? and 2) Do expatriates experience one or more of nine paradoxes derived from the author's own expatriate experiences? Both questions were answered affirmatively with extensive anecdotal data.

The quantitative section of the study was a retrospective correlational analysis focussing on the relationship between awareness of paradoxes and a variety of cultural involvement, competence, acculturation, and effectiveness variables. The cultural variables dealt with the nature of the work, the host culture, and the expatriate's personal situation. The competencies measured were identity integration (Loevinger's ego development),
incongruity tolerance (Driver and Streufert's GIAL), and social acuity (Snyder's self-monitoring scale). Ego development and self-monitoring correlated positively with awareness of one or more of the nine paradoxes. Effectiveness, measured through self-reports, was positively correlated with awareness of the powerful/powerless paradox (feeling powerful as headquarters representative and powerless as a neophyte in understanding the host culture's norms) and negatively correlated with awareness of conflicting demands between headquarters and the host country situation.
DEDICATION

To the memory of my father, Charlie Sautters
ACKNOWLEDGEMENTS

"For those who have not refused the call, the first encounter of the hero-journey is with a protective figure who provides the adventurer with amulets against the dragon forces he is about to pass."

(Campbell, 1968)

Throughout the hero's adventure of this dissertation, I have been surrounded by magical friends. Some gave me amulets (Jean Neumann's "Direction matters more than speed" sign), some gave me magical weapons (books, thoughts, computer programs), and others simply believed in me and assured me that this too would pass.

When I began this dissertation, I carefully chose the magical friends from the faculty that I wanted to accompany me. I chose them for their intellectual and research talents, in addition to their ability to work successfully with students as colleagues; they haven't disappointed me.

To Dr. Eric Neilsen, I extend my deepest thanks for his direction, support, wisdom, and friendship, and yes, even his puns, both during the dissertation process and my years in the program.
To Dr. Michael Manning, who taught me how to do research and how to mentor doctoral students, I extend my heartfelt gratitude for his assistance with both my work and keeping things in perspective. Like Ariadne, he gave me ball of string to find my way out of numerous labyrinths.

I also want to thank Dr. Richard Boyatzis for his unfailing support, motivation, and conceptual contributions to this research. I'm particularly grateful for his unique and inspiring method of pulling research designs out of muddled student brains and for the sense of fun he brings to any encounter.

I extend special thanks to Dr. Darlyne Bailey who provided a role model, empathy, support, and wisdom throughout this process and over the long years.

I owe my largest debt of gratitude to my favorite expatriate, my husband Asbjorn Osland. He drew linear models of my circular thoughts, coded transcripts, chased down references, ran both the household and regressions, and raised the children. Most importantly for the research, he generated many of the paradoxes that were explicated for this study and contributed large doses of his own formidable understanding of the expatriate experience.
I am also grateful to my children, Jessica, Michael, and Katrina for their understanding, patience, and ability to amuse. Thanks are owed to my parents who taught me to believe in myself, be curious and, perhaps most importantly at this point, to finish what I started. I am grateful to my entire family for their encouragement and support.

My years in the department were made immeasurably more pleasurable and full of learning by my classmates - Gail Ambuske, Gaetana Friedman, Karen Locke, Huggy Rao, George Robinson (who always sprang into action when I most needed help), Michael Sokoloff (who taught me how to communicate correctly with a computer), Rudy Williams, and last, but never least, Rad Wilson. I'm especially grateful to Gail Ambuske who kept me intellectual company throughout this dissertation as only a kindred spirit could. I'm also grateful to Sybil Perlmutter and Anne Renio for making the coding of ego development as enjoyable as possible and for their contributions to this study. My special thanks to Juliann Spoth and Sue and Rick Taft who provided me with a place to stay and innumerable kinds of support. I am also grateful to Cecilia McMillen who critiqued a draft and, going yet farther beyond the obligations of friendship, even typed tables! I owe Neal Chandler my gratitude for critiquing my first chapters and warning me that if I
unleash O.B. jargon on the general public, they will probably snicker. I also want to thank Tim Lawler, who generously helped me through the final hoops and hours, and Bob Knight and the Weatherhead School computer lab assistants whose assistance and patience were admirable. Bradford Psenicka served as an expert and patient midwife on delivering the final version out of the computer.

I'd like to extend my thanks to Bonnie Reynolds for her amazing good humor and commitment to getting me out on time, occasionally in spite of myself, and to Pat Kilrain, who kept the candy jar stocked and the messages coming. My thanks also to Retta Holdorf, a magical friend of many years, for her typing and considerable support. I'd also like to thank the entire O.B. faculty for their contributions to my education and development.
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"There is no doubt about it. The moment the storyteller acquires the mythical way of looking at things...that moment marks a beginning in his life. It means a peculiar intensification of his artistic mood, a new serenity in his powers of perception and creation. This is usually reserved for the later years in life; for whereas in the life of mankind the mythical represents an early and primitive stage, in the life of the individual it represents a late and mature one."

Thomas Mann
CHAPTER 1

INTRODUCTION

"Furthermore, we have not even to risk the adventure alone, for the heroes of all time have gone before us. The labyrinth is thoroughly known. We have only to follow the thread of the hero path, and where we had thought to find an abomination, we shall find a god. And where we had thought to slay another, we shall slay ourselves. Where we had thought to travel outward, we will come to the center of our own existence. And where we had thought to be alone, we will be with all the world" (Joseph Campbell, quoted in The Power of Myth, 1988, p. 123).

"Yes, absolutely, working abroad changed me. From what I am told by other people, what they noticed most in me was an increase in self confidence. That most people had confidence in me all along, but they never thought I had confidence in myself.... And people would say, 'You are not the same as you were before. There is just something different about you. I can tell you are much more poised, more confident. I did kind of start to learn to believe in myself more during that time. I think partly because I was getting so much feedback. And I could see we were actually getting results. Quite often in the States I didn't feel that what I was doing was really making a noticeable difference." (Returned expatriate subject)

"People say that what we're all seeking is a meaning for life. I don't think that's what we're really seeking. I think that what we're seeking is an experience of being alive, so that our life experiences on the purely physical plane will have resonances within our own innermost being and reality, so that we actually feel the rapture of being alive." (Campbell, 1988, p. 3)
"You have such an egocentric view of the world, and you go over and my eyes were just opened. I can't remember another 2 year period where I learned as much. Appreciating different cultures and nationalities. I miss that very much.... There is something about coming back here. The drive down to _____, although that is probably one of the prettiest drives you could have, but there's just something about it after driving down Piccadilly and Hyde Park. There is no challenge to it after two years of challenge and just everything new, from catching the subway to finding out what time British railroads go to Dover and the flights to DeGaulle... and all of a sudden back to ____. And there is no challenge to the city of Cleveland.... I don't have to get out a map or anything. ...For 2 years, I carried a map in my briefcase. I must admit I am not thrilled at all with the thought of 'this is it.' I get up in the morning, I back up in my driveway and I say, 'It is a beautiful home and it is a nice, comfortable life, but... '." (returned expatriate subject)

While it may seem an unlikely comparison, expatriate business people have much in common with mythical heroes and the cycle of "the hero's adventure" that Joseph Campbell describes in his book, "The Hero with a Thousand Faces" (1949,1968).

It is my contention that the hero's adventure is an apt metaphor for the overseas experience of the returned expatriates in this study. Therein lies the significance of the experience for them. It was a time of life when they felt alive and challenged both to learn and master new skills and settings. When they returned home, they were not the same people.

Campbell briefly describes the mythological adventure of the hero as occurring in three rites of passage:
separation from the world, initiation involving the penetration to some source of power, and a life enhancing return.

"A hero ventures forth from the world of common day into a region of supernatural wonder: fabulous forces are there encountered and a decisive victory is won; the hero comes back from this mysterious adventure with the power to bestow boons on his fellow man" (1969, p. 30).

We can expand this passage in the context of the expatriate business person. Expatriate managers consider and eventually accept the request to go abroad and leave the domestic office of the organization, and the social support of an established life. They embark on the fascinating, adventurous but initially lonely, overseas assignment. The location is shrouded in ambiguity, due to unknown languages and customs. Their tasks are challenging, often well beyond what the individual would have been asked to accomplish in the United States in terms of autonomy, and of degree and breadth of responsibility. Unfamiliar obstacles of all stripes and colors appear. The latter force the adventuring heroes to question their own identity, their values, and their assumptions about numerous aspects of everyday life previously taken for granted. Some of these obstacles appear in the form of paradoxes the expatriates must learn to resolve. When they perform their tasks successfully and learn to adapt to another culture, the expatriates experience a solid
sense of satisfaction, mastery and self-efficacy. Their return is often marked by a sense of loss at leaving behind the magical charm and fulfillment of the sojourn. But among other changes, they return with greater cognitive awareness of foreign lands, increased self confidence and interpersonal skills, and tolerance for differences in people. Some companies treat them as heroes and make use of the skills they developed or honed abroad; others do not.

The major stages of the hero's adventure that will be used in this study appear below with a brief application to expatriates.

1) Departure:
   (a) the call to adventure, or refusal of the call; the potential expatriates are asked to move to their assignments overseas; some initially refuse the call;
   (b) supernatural aid of a protective figure – a magical friend; for the expatriates this type of assistance is found in local cultural mentors, experienced resident expatriates, the nodes (e.g., international schools, churches, and social-athletic clubs) of social networks, and career mentors back at headquarters;
(c) the crossing of the first threshold: the belly of the whale; surviving the difficulty and uncertainty of the settling-in period; throwing oneself into the other culture;

(2) **Initiation:**

(a) the road of trials; the obstacles - the paradoxes encountered in their assignments;
(b) the ultimate boon; the transformation and benefits of serving as an expatriate;

(3) **Return:**

(a) refusal of the return and rescue from without;

some expatriates were not ready to return before their tour of duty was completed but the company insisted;

(a) the crossing of the return threshold; actual repatriation and adjustment;
(b) master of two worlds; domestic use of skills learned abroad;

**General Background**

Contrary to the opinions of Human Resource managers and even the sojourn literature, expatriates miss more than money, perks, prestige, and autonomy when they return to the United States. These are the more tangible and often
material aspects of expatriate life to which people happily adapt, but they are merely a part of the expatriate experience. It is the less tangible, and, in a sense, more spiritual aspect of the experience that eludes those who have not lived abroad and it is seldom included in the expatriate literature.

The term "sojourner" refers to people who have left their own country to live in another culture, but always with the plan of returning to their native country. For the purposes of this study, the term "expatriate" is defined as U.S. business people working overseas for their companies (Gonzalez & Negandhi, 1966). The literature on expatriate business people is relatively limited and focuses primarily upon selection, training, adjustment, effectiveness and repatriation. Rich descriptions of the subjective experience of the expatriate are found primarily in works of fiction. The transformational nature of the expatriate experience has been virtually ignored in the business literature, perhaps because it is a radical humanist topic in a functionalist world. And yet, a deeper understanding of this transformation could only work to the advantage of both companies and the expatriates themselves.

There are two alarming statistics on American expatriates - a higher failure rate (30%) of expatriate assignments than is found in European or Japanese firms
(Tung, 1987) and a tendency among returned expatriates to become dissatisfied and even quit their jobs. One source estimates that 25 percent of expatriates leave their jobs shortly after repatriation (Black, personal conversation, 1989). A better understanding of the complex nature of the expatriate experience might produce better ideas for improving the way both expatriates and companies handle overseas assignments.

The personal transformation reported by the returned expatriates in this study is comparable to the accounts of people who have been deeply touched by T-groups, mid-life career changes, personal tragedy, or other unsettling, unique and psychologically demanding experiences. Expatriates are upended by concurrent changes in culture, job context, and socio-economic supports. In a sense, the cross-cultural context of the present study is crucial only as a milieu in which many individuals came to question their basic assumptions about themselves, their culture, their interpersonal relationships, particularly in the context of management. The cross-cultural context provides sufficient stressors, both positive (e.g., novelty and adventure) and negative (e.g., value questions, feelings of inadequacy, and family problems), in both an accelerated and accentuated fashion, to require people to act "heroically." Expatriates have to plumb the depths of
their social-psychological resources first to survive the differences and changes, then to be effective, and finally, to develop explanations for the ambiguity of their new experiences. They need to come to a resolution of what it all meant, both on a cognitive and emotional level, for their own personal transformation. According to one theory (Holmes & Rahe, 1967), the level of stress is related to the number of changes that occur in different aspects of a person's life. A move abroad can produce simultaneous changes on virtually all fronts. Because the level of stress is so high for many expatriates, the cross-cultural setting demands that ordinary people rise to extraordinary and even heroic heights.

In addition to its transformational nature, another little discussed aspect of the overseas sojourn is the experience of paradox. While paradoxes may be common topics of conversation among expatriates, they have received only a glancing mention in the expatriate literature and have never been studied empirically. Paradoxes are endemic in the boundary spanning role performed by expatriates because they serve as mediators both between cultures and organizations. For the purposes of this study, paradox is defined as a situation involving two contradictory truths.
I developed the following paradoxes from over 11 years of personal experience and observations as an expatriate.
- Because of their role, expatriates typically have a high degree of personal power but working well with nationals often involves downplaying personal power and emphasizing the empowerment of others.
- Effective expatriates think well of the local people but at the same time are wary of them.
- The demands of headquarters and the demands of the local situation may be contradictory.
- Expatriates perceive the cultural stereotype and individual differences among host country nationals at the same time.
- In order to be accepted, expatriates relinquish some of their American values at the same time their core cultural values are becoming even stronger as a result of exposure to another culture.
- Expatriates are at ease anywhere but belong nowhere.
- Expatriates who open themselves up to other cultures and other ways of thinking relax boundaries, become more worldly, and acquire more of a macro-orientation. However, at the same time, they become more idiosyncratic in integrating and organizing stimuli to create their own
value system. This split macro/micro orientation was described by Adler (1974).

"Where the configuration of loyalties and identification is constantly in flux and where boundaries are never secure, multicultural man [the expatriate] lays himself open to any and all kind of stimuli. In the face of messages which are confusing, contradictory, or overwhelming, the individual is thrown back on his own subjectivity with which he must integrate and sort out what he allows himself to take in" (Adler, 1974, p. 373).

- Expatriates tend to see their own culture more positively than their compatriots back home (Triandis, 1967). The same phenomenon may well occur with their organizations. At the same time, however, successful expatriates may live with the knowledge that the organizational values they present to their employees and the foreign community are ideals that cannot be found at headquarters.

- Expatriates are liberated from most of the bounds of their own culture and at the same time are granted certain liberties from the rules of the foreign culture, as long as crucial amenities are observed. Expatriates are both free and not free of cultural norms.

I knew from my own background that expatriates who worked in the field of international development experienced these paradoxes but would the same be true for expatriate business people? Thus, a major thrust of this investigation is to ascertain whether these paradoxes were
experienced by a sample of returned expatriates. Assuming that the answer would be affirmative to some degree, the next questions that come to mind are (1) will the expatriate's degree of cultural involvement influence the perception of these paradoxes? and (2) what competencies are needed to handle these paradoxes? Expatriates have widely varying degrees of cultural involvement due to their jobs, personalities, families, environments, and adaptation strategies. The spectrum includes at one end inhabitants of the "Golden Ghettos" who socialize only with the expatriate American community and at the other people who "go native" and socialize only with host country nationals. This study attempts to operationalize the concept of cultural involvement (type of job, role, number of years lived abroad, language fluency, etc.) and to determine its relationship to awareness of these paradoxes.

Dimensions of effectiveness are a common topic in the expatriate literature. After reviewing the literature, Mendenhall & Oddou (1985) identified four dimensions of effectiveness: (1) self-orientation, (2) others-orientation; (3) the perceptual dimension; and (4) "cultural toughness" or permeability. This classification scheme is helpful, but, with some exceptions, it focuses upon effective adaptation strategies rather than the underlying individual competencies called for by the
situation. What happens if we take a different approach and focus on the inherently paradoxical aspect of the expatriate experience? Can we learn anything new about dimensions of expatriate effectiveness if we start with the subjective experience and emotional world of the expatriate? In particular, what competencies do expatriates need to deal with the previously explicated paradoxes? Identity integration, tolerance of incongruity, and social acuity (the ability to read social cues and adapt one's behavior accordingly) appear to be the competencies needed for these particular paradoxes. If these are the requisite competencies, is there a relationship between them and both the awareness of paradox and the outcome measures of acculturation and effectiveness?

Significance of the Study

There is very little research on the subjective sojourn experiences of business people. Numerous studies have been done with Peace Corps volunteers, educational advisors, and international students (Brein & David, 1971) but their status relationship with host country nationals and their goals are significantly different from that of expatriate business people.
Existing empirical studies on expatriate business people are generally confined to selection, training, adjustment, effectiveness, and repatriation. In contrast, this study will focus upon the transformational nature of the experience and the metaphorical "road of trials" or paradoxes which lead to transformation. Furthermore, this study will employ the metaphor of the Hero's Adventure in a qualitative fashion to go beyond the descriptive and anecdotal nature of existing literature.

A deeper understanding of the expatriate experience should yield practical implications for both companies and expatriates. The high rate of early returns and resignations upon reentry are a signal that our understanding of this phenomenon is inadequate. The study may provide more guidance to companies regarding their expatriate policies and may help expatriates make better sense of their experience.

The Current Investigation

A group of 35 American business people completed demographic questionnaires and instruments to assess their levels of identity integration, incongruity tolerance, and social acuity. They were interviewed in depth about their overseas experience, the paradoxes they remembered, and their reentry.
The study is an attempt at grounded theory building. It is based upon the researcher's experience in other cultures and exposure to countless expatriates. The study has both exploratory and developmental aspects. The exploratory part will attempt to answer two questions about the expatriate experience: (1) Is the hero metaphor a useful framework for describing the experience? and (2) do expatriate business people experience paradoxes and, if so, what are they?

The developmental portion attempts to take known concepts or measures and add to our knowledge about them. It takes the form of a correlational study of individual differences in the areas of ego development, incongruity tolerance, and social acuity as they relate to awareness of paradox, acculturation, and effectiveness.

The purpose of the study is not to measure the experience. Nor is the objective to develop a prescriptive framework, a "How to Move Abroad and Be Happy" booklet. The aim of the study is to provide a thicker description of the subjective sojourn experience that reveals the rich diversity of human individuality in order to add greater depth to both research and practical implications.

There are numerous contingencies that affect sojourns, and people succeed abroad even though they travel very different paths. There are few rules, yet, like the chess
master, it's possible for the expert international HR professional to become familiar with numerous combinations of contingencies and develop a feel for what may work. Thus, this study is intended to complicate matters rather than simplify them for the international HR profession. The rules that are generalizable (e.g., "learn the language," "appreciate differences," or "tolerate ambiguity") are important but fairly self-evident. However, there are patterns to be understood and every event is not unique. I hope this study adds richness to cross-cultural and international human resources management and also serves as a "magical friend" to inspire other researchers on the cross-cultural adventure.

Purpose of the Study

The purpose of the study is to employ the metaphor of the hero's adventure and to explore the notion of expatriate paradoxes to enrich our understanding of the little researched subjective experience of expatriate business people. Expatriate paradoxes were explicated and measured with variables that operationalize the degree of cultural involvement, competencies for dealing with paradox, acculturation, and effectiveness. The three competencies used are identity integration, incongruity tolerance, and social acuity.
In summary, the study attempts to answer the following questions: Is the hero's adventure metaphor a useful framework for describing the expatriate experience? Do expatriates encounter paradoxes, and if so, what are they? Do factors that predispose the expatriate to a particular degree of cultural involvement influence the awareness of paradoxes? Is there a relationship between awareness of paradox and the three competencies and acculturation and effectiveness?

Summary of the Following Chapters

Chapter II reviews the sojourn literature and includes the pertinent findings on the expatriate experience. Relevant literature on the study's major concepts, the enactment of heroism and paradox, is presented, followed by information regarding the measures of the three competencies: ego development (identity integration), General Incongruity Adaptation Level (incongruity tolerance), and self-monitoring (social acuity). The research models, questions and hypotheses are presented at the end of the chapter.

Chapter III discusses the research design and its implementation. Specifically, this chapter outlines the methodology, operationalization and instrumentation, and statistical design for the analysis of the data.
Chapter IV includes the qualitative description and interpretations that respond to the research questions. It includes the analysis of the hero's adventure metaphor and the description of the paradoxes.

Chapter V presents the quantitative results and relevant discussion for the research hypotheses and additional findings.

Chapter VI concludes the thesis with an overview of the study and a summary of the findings. The limitations of the research and the theoretical implications are discussed, followed by suggestions for further research. The chapter ends with the practical implications of the findings.
Notes

1. Competencies are underlying characteristics that may be skills, motives, traits, self-image or roles, or a body of knowledge one uses (Boyatzis, 1982).
CHAPTER II
LITERATURE REVIEW

Overview

The purpose of the current investigation is to examine the usefulness of the hero's adventure metaphor in elucidating the expatriate experience and to investigate the expatriate experience of paradox in relation to the degree of cultural involvement, competencies, acculturation and effectiveness. Before reviewing the literature related to these variables, some preliminary information on expatriates will be presented.

The first section, Background Information, will begin with a brief summary of the relevant literature on the expatriate experience. The second section, the Enactment of Heroism, will review the literature on this concept and what it means to human beings. The myth of the hero's adventure will be presented in detail in Chapter V, Qualitative Description and Interpretation, and therefore is not treated in detail in the literature review. The third section presents the concept of paradox and its application to the expatriate experience in the literature.
The fourth section presents research findings on the three competencies, identity integration, incongruity tolerance, and social acuity. These are the three psychological factors that were measured in the current investigation.

In the fifth section, a summary of the literature review and the research models and hypotheses will be presented.

**Background Information**

**Sojourn Research.** The term "sojourner" refers to people who have moved from their native country to an alien culture with plans to return to their own country. There are many types of sojourners — students, trainees, technical assistants, tourists, businessmen, military personnel, missionaries, foreign service officers, professors and others. Most of this research focused upon people from other cultures who were sojourning in the United States. Of the studies on Americans, the majority concerns students, educational advisors, and Peace Corps volunteers.

In general, the sojourn research focuses upon the individual sequence of overseas adjustment (Jacobson, 1963). Church (1982) compiled a literature review of over 300 articles on sojourn adjustment. In Brein & David's review (1971) they claim there have been relatively few studies of the adjustment of the returnees to their home
country, the permanence of the sojourn effects, the effects of the sojourner upon the hosts, and the effects of the returnees on their own country (Brein & David, 1971). Furthermore, there is little research concerning the pattern of expectations that sojourners hold prior to the experience, even though this seems to be an important aspect of the pre-departure phase of the sojourn (Jacobson, 1963). The field is characterized by a paucity of both theory, that explains anything other than adjustment, and longitudinal studies.

Expatriate business people differ from most other types of sojourners in terms of social status, role, and the purpose for sending them abroad. Furthermore, an argument could be made that business people face less of an adjustment than other sojourners because they share common business values with business people from other cultures. Several studies have shown that managers have more values in common with managers from other cultures than with their own compatriots (Haire, Ghiselli & Porter, 1966; Kerr, Harbison, & Myers, 1961). Sometimes their status and need to travel to other countries prevents them from getting as involved in the local culture as other sojourners do.

Most of the expatriate research focuses upon selection, training, adjustment, and effectiveness. Much of the literature is either anecdotal (war stories about cultural
differences and misunderstandings) or descriptive (expatriate roles abroad, types of training, dimensions of effectiveness).

Other than theories about the adjustment process, role theory is the only conceptual model that is commonly applied to expatriates. Moreover, other than reports on adaptation, the nature of the subjective experience is not well documented. The logistics of observing or interviewing subjects in other countries may well hinder certain research designs. The current investigation will make only modest contributions to the theory in this area, but it should contribute to the richness of our knowledge about the subjective expatriate experience. Furthermore, it diverges from the usual research questions and considers topics that are not commonly found in the literature. The preoccupation with adjustment may have led researchers to focus less upon the transformation that occurs with expatriates.

**High Expatriate Failure Rate.** The rates of early return, expatriate failures, range from 16% to 50% (Black, 1988; Copeland & Griggs, 1985; Mendenhall, Dunbar & Oddou, 1987; Misa & Fabricatore, 1979; Tung, 1981). The most quoted figure is a failure rate of 30% (Mendenhall & Oddou, 1985). Furthermore, it is not certain that those who remain abroad for their entire assignment are functioning at full
efficiency (Conway, 1984). The financial cost of returning expatriates before their tours are completed is substantial; estimates range from $55,000 to $150,000 per family (Copeland & Griggs, 1985; Misa & Fabricatore, 1979). The invisible costs of an early return are loss of self-esteem and loss of prestige among peers for the managers (Mendenhall & Oddou, 1985), increased difficulty in attracting top talent to accept overseas positions, and possible loss of credibility for the company abroad (Gregerson & Black, 1989).

Tung (1981) identified the major reasons for early return of expatriates, in descending order of frequency, as (1) the inability of the spouse to adjust, (2) the manager's inability to adapt to a different physical or cultural environment, (3) other family related problems, (4) the manager's personality or emotional immaturity; (5) the manager's inability to cope with the responsibilities posed by the overseas work; (6) the manager's lack of technical competence; and (7) the manager's lack of motivation to work overseas. Selection and training are often blamed as the cause of the high U.S. expatriate failure rate (Tung, 1981; Conway, 1984; Mendenhall, Dunbar, & Oddou, 1987).

**Selection and Training.** The problems with selection and training are summarized as (1) inadequate understanding
of the relevant variables of expatriate acculturation and 
(2) inappropriate selection and training methods 
(Mendenhall & Oddou 1985; Mendenhall, Dunbar, & Oddou, 
1987). Personnel directors have consistently employed rigid 
and simplistic methods in choosing and training managers to 
be sent abroad. Even though research has proven that 
interpersonal ability is crucial, technical competence is 
still the major criteria for selection. It is surprising 
how many major multinational still lack a coherent 
personnel policy for expatriates. While selection and 
training could no doubt be improved, it seems unlikely that 
the cause of a high failure rate is not also related to 
other organizational variables.

There are a variety of cross-cultural training 
programs for expatriates that range from area studies to 
sensitivity training and field experience (Tung, 1981). 
However, they are not always used. According to the 
literature, the reasons companies give for not providing n 
training are (1) perceived ineffectiveness of such 
training; (2) expatriate dissatisfaction with such 
training; (3) insufficient time between the assignment and 
the departure; (4) the belief that the temporary nature of 
the expatriate assignment does not make training 
worthwhile; (5) the trend toward employing indigenous 
management; and (6) the lack of a perceived need for
training programs on the part of top management (Mendenhall, Dunbar & Oddou, 1987).

**Acculturation.** Acculturation and adjustment are terms that are sometimes used n. In exasperation with the definition of the term "acculturation", the Social Science Research Council appointed a Subcommittee on Acculturation that was composed of three famous anthropologists. The definition they proposed was "those phenomena which result when groups of individuals having different cultures come into continuous first-hand contact with subsequent changes in the original pattern of either or both groups" (Redfield, Linton & Herskovits, 1936, p. 149). The concept has been expanded to include individual acculturation. Psychologists and psychiatrists tend to treat acculturation as an intrapsychic phenomenon while sociologists and anthropologists view it as an interpsychic or interpersonal group process (Chance, 1965). Berry (in Padilla, 1980), a respected authority on acculturation, suggests that acculturation consists of a three phase process: contact, conflict, and adaptation. Thus, adaptation and adjustment are often characterized as a phase of acculturation. In the literature, adjustment is often defined as a subjective report of the expatriates' satisfaction with different aspects of their sojourn (Lysgaard, 1955).
Although there is some controversy on the subject (Furnham & Bochner, 1986), much of the adjustment literature agrees that there is a predictable pattern to overseas adjustment that is highly related to length of time abroad. Lysgaard (1955) identified the U-curve phenomenon. Gullahorn and Gullahorn (1963, 1966) added in the sojourners' adjustment to the return home and extended the U-curve to a W curve. After an initial euphoria, sojourner adjustment decreases between the 6-12 month due to culture shock and then rises again. After the return home, adjustment again decreases. Culture shock, first named by Oberg (1960) is defined by Hall (1959) as "a removal or distortion of many of the familiar cues one encounters at home and the substitution for them of other cues which are strange" (p. 156). Oberg identified 4 stages (1) initial euphoria; (2) crisis resulting from the genuine difficulties of daily life in a different culture; (3) a period of recovery in which the sojourner is beginning to "crack the code" and understand some of the host culture cues; (4) complete or nearly complete recovery characterized by acceptance of the host culture; and (5) the less intense reverse culture shock that occurs upon repatriation. Some authors contend that the reverse culture shock can be more intense than that which occurs during the move abroad (Adler, 1986). Oberg utilizes a
disease model that focuses upon the ethnocentric notion of adapting to another culture. Gullahorn and Gullahorn (1963) highlight the cognitive dissonance of living in two cultures. Adler (1975) likens the cross cultural experience to a transitional experience that is transformational in nature. His 5-stage model appears in Table 2.1. Bochner (1986) frames the cross-cultural experience, not as adjustment, but as cultural learning which involves figuring out the social behavioral cues and requirements of another culture. A social support system is the best context for cultural learning. The work of Gullahorn and Gullahorn, Adler, and Bochner are the models of acculturation that guide the current investigation.

Many authors have described the range of reactions to contact with another culture; their schemes are usually based in Horney's (1950) idea of moving with or toward, moving against, or moving away from a stimulus. Bochner's (1982) scheme consists of (1) persons who reject their culture of origin and try to "pass" as members of the other culture, (2) chauvinistic persons who reject the second culture and exaggerate the value of their own, (3) marginal persons who vacillate between both cultures, and (4) mediating persons who synthesize and appreciate both cultures. This model appears in Table 2.2.
Table 2.1 Adler's five-stage theory of culture-shock development

<table>
<thead>
<tr>
<th>Stage</th>
<th>Perception</th>
<th>Emotional range</th>
<th>Behaviour</th>
<th>Interpretation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Differences are intriguing.</td>
<td>Excitement</td>
<td>Curiosity</td>
<td>The individual is insulated by his or her own culture. Differences as well as similarities provide rationalization for continuing confirmation of status, role, and identity.</td>
</tr>
<tr>
<td></td>
<td>Perceptions are screened and selected</td>
<td>Stimulation</td>
<td>Interest</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Euphoria</td>
<td>Assured</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Playfulness</td>
<td>Impression-</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Discovery</td>
<td>istic</td>
<td></td>
</tr>
<tr>
<td>Disintegration</td>
<td>Differences are impactful.</td>
<td>Confusion</td>
<td>Depression</td>
<td>Cultural differences begin to intrude. Growing awareness of being different leads to loss of self-esteem. Individual experiences loss of cultural support ties and misreads new cultural cues</td>
</tr>
<tr>
<td></td>
<td>Contrasted</td>
<td>Disorientation</td>
<td>Withdrawal</td>
<td></td>
</tr>
<tr>
<td></td>
<td>cultural reality</td>
<td>Loss</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>cannot be</td>
<td>Apathy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>screened out</td>
<td>Isolation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Loneliness</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Inadequacy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reintegration</td>
<td>Differences are rejected</td>
<td>Anger</td>
<td>Rebellion</td>
<td>Rejection of second culture causes pre-occupation with likes and dislikes; differences are projected. Negative behaviour, however, is a form of self-assertion and growing self-esteem.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rage</td>
<td>Suspicion</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nervousness</td>
<td>Rejection</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Anxiety</td>
<td>Hostility</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Frustration</td>
<td>Exclusive</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Opinionated</td>
<td></td>
</tr>
<tr>
<td>Autonomy</td>
<td>Differences and similarities are legitimized</td>
<td>Self-assured</td>
<td>Assured</td>
<td>The individual is socially and linguistically capable of negotiating most new and different situations: he or she is assured of ability to survive new experiences.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Relaxed</td>
<td>Controlled</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Warm</td>
<td>Independent</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Empathic</td>
<td>'Old hand'</td>
<td></td>
</tr>
<tr>
<td>Independence</td>
<td>Differences and similarities are valued and significant</td>
<td>Trust</td>
<td>Expressive</td>
<td>Social, psychological and cultural differences are accepted and enjoyed. The individual is capable of exercising choice and responsibility and able to create meaning for situations.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Humour</td>
<td>Creative</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Love</td>
<td>Actualizing</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full range of previous emotions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 2.2 Outcomes of cultural contact at the individual level: psychological responses to 'second culture' influences

<table>
<thead>
<tr>
<th>Response</th>
<th>Type</th>
<th>Multiple-group membership affiliation</th>
<th>Effect on individual</th>
<th>Effect on society</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reject culture of origin, embrace second culture</td>
<td>'Passing'</td>
<td>Culture I norms lose salience; Culture II norms become salient</td>
<td>Loss of ethnic identity; Self-denigration</td>
<td>Assimilation; Cultural erosion</td>
</tr>
<tr>
<td>Reject second culture, exaggerate first culture</td>
<td>Chauvinistic</td>
<td>Culture I norms increase in salience; Culture II norms decrease in salience</td>
<td>Nationalism; Racism</td>
<td>Inter-group friction</td>
</tr>
<tr>
<td>Vacillate between the two cultures</td>
<td>Marginal</td>
<td>Norms of both cultures salient but perceived as mutually incompatible</td>
<td>Conflict; Identity confusion</td>
<td>Reform; Social change</td>
</tr>
<tr>
<td>Synthesize both cultures</td>
<td>Mediating</td>
<td>Norms of both cultures salient and perceived as capable of being integrated</td>
<td>Personal growth</td>
<td>Inter-group harmony; Pluralistic societies; Cultural preservation</td>
</tr>
</tbody>
</table>

Mendenhall and Oddou (1985) found four themes in the literature that relate to expatriate acculturation. The first dimension, Self-Orientation, consisted of stress reduction, technical competence, and reinforcement substitution. This last subfactor is defined as the willingness to "replace activities that bring pleasure and happiness in the home culture with similar - yet different-activities that exist in the home culture."

The second dimension, Others-Orientations, is composed of 2 subfactors: (1) relationship development and (2) willingness to communicate and engage with the local culture. Research results indicate that expatriates who are capable of developing long-lasting friendships and close relationships with host culture members are more acculturated. In addition to providing a sense of social belonging, these relationships provide the expatriate with a mentor who explains the other culture and guides the expatriate's behavior.

The third dimension, the Perceptual Dimension, refers to the ability to understand why the local culture behaves as it does. This requires an attitude and accurate behavioral attributions. Well-adjusted expatriates seek out more information about the other culture (Ratiu, 1983) and are more willing to update their perceptions as they gather new data (Detweiler, 1975).
The fourth dimension concerns Cultural-Toughness. Unlike the other dimensions, it is not an expatriate competency but rather an external constraint upon adjustment. It refers to the varying degrees of difficulty in adjusting to different cultures. Greater cultural barriers and degrees of dissatisfaction are found in certain areas - Southeast Asia, Japan, Africa, and the Middle East. Therefore, the particular country of assignment also influences expatriate adjustment.

**Expatriate Effectiveness.** One of the most common areas of expatriate research is expatriate effectiveness. Researchers have tried to discriminate the factors that lead to effectiveness in order to improve selection criteria. The dimensions of intercultural effectiveness have been categorized as (1) the ability to deal with psychological stress, (2) the ability to communicate effectively, (3) the ability to establish interpersonal relationships (Gudykunst & Hammer, 1984). Technical competence is also essential for effectiveness, but interpersonal ability greatly increases the probability of success (Tung, 1987)

**Repatriation.** Repatriation is also described in the literature as an adjustment problem, a reverse form of culture shock that may be even worse than what occurred abroad. Adler (1986) states that 20% of expatriates want
to resign their jobs when they return to the United States. One estimate places the figure of expatriates who actually leave their companies at 25% (Black, personal communication, 1989).

The most commonly cited reasons for repatriation dissatisfaction in the author's conversations with Human Resource managers are decreases in disposable income (Clague & Krupp, 1978), prestige, perks, and autonomy (Adler, 1986; Clague & Krupp, 1978; Harvey, 1982). Other job-related reasons are dissatisfaction with their job in the United States because they have not been promoted while colleagues who stayed in the U.S. have (Clague & Krupp, 1978; Howard, 1979) and/or discovering their job is not as challenging or satisfying as their work abroad (Adler, 1986), and does not reflect any career pathing (Harvey, 1982). Some expatriates do not even have an assigned job when they return; instead they are put into a 'holding pattern' (Harvey, 1982). Returnees may also feel isolated because top personnel have changed and they no longer know people in power who could be looking out for their career (Harvey, 1982). Sometimes the expatriates find they are resented by their colleagues upon their return (Howard, 1973). The company may have changed so much that the expatriates find themselves socially and professionally isolated or unpleasantly surprised by the changes that took
place in their absence. Expatriate roles are often
generalist positions in contrast to the specialized roles
that exist in corporate headquarters; some expatriates find
their technical skills somewhat obsolete (Conway, 1984).
Furthermore, some companies do not respect the
international experience or skills the expatriates acquired
abroad. On the personal side, returnees miss the
expatriate life style and social life that they enjoyed
abroad (Clague & Krupp, 1978; Kendall, 1981). They may also
have to settle for a lower quality house and schooling for
their children (Kendall, 1981). Adler notes the shock of
reality for expatriates who idealized home while they were
abroad (1986).

Most of these dissatisfactions concern unmet
expectations and the surprises, contrasts, and changes
(Louis, 1980) that are common occurrences in job transfers.
The interesting question is why they result in such a high
degree of terminations and dissatisfaction. The causes
inferred from commonly cited reasons for repatriate
dissatisfaction are the system's failure to reward the
expatriate and the expatriate's having become "spoiled"
abroad. Once again, there is little mention of the
transformations that may have occurred in expatriates
abroad which would make it difficult for them to fit back
into their companies. Perhaps a more useful way to
conceptualize this phenomenon is by using Lawrence and Lorsch's (1967) construct of differentiation and integration. If it is true that expatriates become transformed and differentiated as a result of their cross-cultural experience, then repatriation difficulties can be understood as an integration problem.

Transformation. The most prevalent form of expatriate transformation that is discussed in the literature refers to the process of acculturation. When one enters another culture, one is forced to confront one's own values, basic assumptions, and character. Torbiorn (1982) terms the mental map or cultural programming we receive from our native culture a "frame of reference"; Schutz (1944) called it "thinking as usual" while Spradley & Phillips (1972) write about cognitive maps. One rubs up against and becomes aware of one's implicit cultural patterns and communication patterns because they are not effective in the new culture. According to W.I. Thomas' definition, a crisis erupts that "interrupts the flow of habit and gives rise to changed conditions of consciousness and practice" and overthrows the system of relevant "knowledge." This is the crisis that also occurs with expatriates who leave their culture to confront another. They find, usually with some degree of discomfort, that their own system of tested recipes for the social world are only applicable in a
specific context. Therefore, they are forced to question basic assumptions and become conscious of both assumptions and behavior that were previously taken for granted. In like manner, everything about the other culture must be questioned because the stranger has no implicit and/or historical knowledge of that culture.

Spradley & Phillips (1972) state that stress results from accommodating to a change in cultural environment that involves reorganizing cognitive maps, learning new rules for interaction, changing previously learned definitions of experience, and acquiring skills needed to perform in the new situation. Within their own culture, people are content with vague, general cultural knowledge; in a strange culture they have to seek an explicit understanding of both the content and reason behind the cultural elements. Thus, as Schutz states,

"The cultural pattern of the approached group is to the stranger not a shelter but a field of adventure, not a matter of course but a questionable topic of investigation, not an instrument for disentangling problematic situations but a problematic situation itself and one hard to master." (1944, p.104)

In the process of understanding the other culture, the expatriate develops new values, attitudes, and behavioral patterns. Perhaps Kuhn's (1970) theory of paradigmatic shifts in science may explain what occurs as expatriates struggle to assimilate two frames of reference. Paradigms are patterns of basic assumptions about nature. Kuhn
maintains that there are two modes of scientific operation. Normal science grows incrementally and attempts to fit new knowledge and facts into an agreed body of theories and assumptions. However, revolutions occur periodically and new paradigms supercede the old. The same could occur with the personal constructs (Kelley, 1955) or mental maps of expatriates.

One of the most ubiquitous personal contracts is "the hero". The myth of hero is one of the oldest and most popular of all myths. The next section explains why heroism is so important to humans.

The Enactment of Heroism.

"When the imaginary saint or lover or hero moves us most deeply, it is the moment when he awakens within us for an instant our own heroism, our own sanctity, our own desire." William Yeats

"Mankind's common instinct for reality...has always held the world to be essentially a theatre for heroism." William James

Humans spend an inordinate amount of time focusing on heroism and heroes. Our literature, art, highest cultural honors, and the hero worship we accord certain people all corroborate James' statement that we view the world as a theatre for heroism. A film like Star Wars, that closely follows the traditional hero's adventure myth, strikes a responsive chord within us all.
What is the explanation of our fascination with heroism? This is a topic that has intrigued many writers; this review will focus upon the work of two of the most respected scholars of heroism, Otto Rank and Ernest Becker. They shared the belief that the central paradox facing mankind is that "even in life we are in the midst of death." Humankind is forced to acknowledge the duality of its nature. On one hand we are creatures with appetites and animal nature; on the other hand, we are capable of ingenuity, insight, and consciousness (Becker, 1973). Regardless of our "god-like" capacities, we must all face death. "The irony of man's condition is that the deepest need is to be free of the anxiety of death and annihilation; but it is life itself which awakens it, and so we must shrink from being fully alive" (Becker, 1973, p.66) Rank (1963) termed this paradox the twin burdens of 'fear of life' and 'fear of death.' We risk being overwhelmed by the possibility of life on one hand and by the enervating knowledge that whatever we do, our demise remains a certainty.

Becker's Pulitzer prize winning book, THE DENIAL OF DEATH (1973), is a carefully reasoned argument that supports Rank's view that it is the fear of death, and not sexuality as Freud believed, that humans repress. Our need to deny death drives us to coping mechanisms and serves as
a mainspring of activities. The two coping mechanisms that relate to this investigation are cultural illusions and heroism. Rank claimed that human beings utilize cultural illusions as a coping mechanism. Heroes personify the tangible ideals of a culture; thus they always represent the mass of humanity (Wilson, 1982). Culture provides people with a program for cultural heroism that prevents a close confrontation of reality. Becker perceives societies as codified hero-systems that provide their members with a script for heroism, and yet each culture's script is different and unique.

"It doesn't matter whether the cultural hero-system is frankly magical, religious, and primitive or secular, scientific, and civilized. It is still a mythical hero-system in which people serve in order to earn a feeling of primary value, of cosmic specialness, of ultimate usefulness to creation, of unshakable meaning." (Becker, 1973, p. 5)

Becker, writing in the early 1970's and confronting his own death from cancer, contends that the crisis in modern society is the lack of a meaningful and believable hero system. As proof, he points to the realization that people sacrificed their lives in an unjust war in Vietnam and to the "debasing and silly heroics of the acquisition and display of consumer goods, the piling up of money and privileges that now characterize whole ways of life, capitalist and socialist" (Becker, 1973, p. 7). He
interprets the "dropping out" of the 60's as youth's dissatisfaction with our society's plan of action for them; it no longer allowed them to feel heroic. Indeed, it is primarily primitive cultures that provide a feeling of heroism to all their members.

Why is feeling heroic so important to humans? Becker attributes it to our nature and the fact that we receive our validation and self-worth externally. "He [humankind] must desperately justify himself as an object of primary value in the universe; he must stand out, be a hero, make the biggest possible contribution to world life, show that he counts more than anything or anyone else" (1973, p.4). Thus we are driven to create and contribute things that will outlast death and have lasting worth and meaning.

It is curious how such a basic human phenomenon can remain unknown to so many people. Few people would claim that it is the fear of death that motivates them in their lives. However, Becker claims that people could not function if they were consciously aware of this fear. Instead, it is repressed early in life and this repression is maintained by Rank's cultural illusions. Kierkegaard's description of 'cultural normality' referred to those who live automatically and uncritically, occupied by the triviality of their lives and content to imitate others rather than be themselves. In addition to our cultural
norms, our characters also protect us from confronting the realities of our lives. By shedding that armor, we risk madness. Indeed, Rank saw neurotics as those who had lost the ability to deny death and could not accept cultural illusions. Throughout history, "sages have insisted that to see reality one must die and be reborn" (Becker, 1973, p. 57). This is also a basic tenet of the hero's adventure myth. The hero symbolically or literally dies and is reborn with a new consciousness.

In addition to our need for self-esteem, the other basis for our urge for cosmic heroism is narcissism, or absorption with the self, which is hardly a positive trait. Becker paraphrased Aristotle's remark, "Luck is when the guy next to you gets hit with the arrow." (1973, p. 2) However, Becker also highlights the more admirable side of heroism, the human capacity to be generous and self-sacrificing when a cause is deemed worthy.

Heroism serves as a means of denying death through its promise of immortality. The picture of the hero from ancient times that has emerged from anthropological and historical research is the man who could go into the spirit world, the world of the dead, and return alive. Many religious heroes came back from the dead and were healers, like Jesus. Thus, they provided what Hall (in Becker, 1973, p. 12) calls "the immunity bath" from death and the dread
of it - the greatest evil. Societies have always reserved their highest honors for military heroes who face death with courage. The military hero confronts death and conquers it by killing his country's enemies. Like the mythical heroes, the soldier-hero also leaves on long odysseys, and returns with life-enhancing knowledge.

Hero worship can be understood as the belief that "those who partake of the hero's aura will share his apparent immunity to death as he survives miraculously amid the slaughter. To be stronger than enemies who wish your death is to be stronger than death itself." (Hampden-Turner, 1981, p. 66). For Rank, the explanation of transference lies in its ability to tame terror. Although the world is chaotic and we ourselves are powerless, we can at least endow another person with power (Becker, 1973).

How does the enactment of heroism relate to the expatriate? First, there are certainly surface similarities between heroes and expatriates. The story line is the same for mythical heroes and expatriates; both leave their native land and are called to an adventure fraught with obstacles and trials. Both return home where they may or may not be accorded hero status. The part of the metaphor which has yet to be investigated is the transformation stage of the hero's adventure. We know some of them become acculturated, but are expatriates
transformed in the process, and do they experience a sense of heroism? This is the purpose of this investigation. But we can surmise from the literature on heroism that the answers to these questions will be positive.

First, we know that an overseas experience has been characterized by those who have experienced it, as an adventure, the "last frontier", and a proving ground for some people (Gonzalez & Negandhi, 1967; Fadiman in Serrie, 1986; Mendenhall & Oddou, 1988). Some people, presumably those who consciously perceive a lack of adventure and heroism in their lives, seek out the experience for precisely these reasons.

Secondly, even when the adventure is not consciously sought, the stage is set for a confrontation with cultural illusions. Entering another group forces one to confront the inadequacy of one's own cultural illusions ('thinking as usual' in Schutz's terms; 'frame of reference' in Torbiorn's) and to come face to face with both oneself and one's reality. As Becker states,

"Man cuts out for himself a manageable world; he throws himself into action uncritically, unthinkingly. He accepts the cultural programming that turns his nose where he is supposed to look; he doesn't bite the world off in one piece as a giant would, but in small manageable pieces, as a beaver does. He uses all kinds of techniques, which we call the "character defenses"; he learns not to expose himself, not to stand out; he learns to embed himself in other-power, both of concrete persons and of things and cultural commands; the result is that he comes to exist in the imagined infallibility of the world around him. He
doesn't have to have fears when his feet are solidly mired and his life mapped out in a ready made maze." (1973, p.23)

Expatriates are anything but solidly mired when so many of their life anchors have been left behind. They cannot help but "stand out", and this heightened visibility of self (Ambuske, personal conversation, 1989) is a major theme in the stories expatriates tell about their overseas experiences. The heightened self-reflection and contemplation of a previously unexamined life would seem to force a new level of consciousness upon most expatriates. In this respect, their lives may resemble the artist's life which evokes a personal synthesis (Rank, 1959). Rank argued that since artists do not follow the well-trod path, they are forced to make their personal peace with reality. Whether this would result in the enactment of heroism, and/or combinations of other forms of coping depends upon individual expatriates and their environmental contexts. In any case, it seems safe to assume that expatriates are placed in a situation that threatens their normal repression of the fear of death and that heroism is one possible reaction.

The myth of the hero's journey is also concerned with man's ability to break through cultural bonds and the unexamined life and free himself and the world in the process. As Norman, an expert on mythology, states, "In direct opposition to traditional fertility rites, man's
perennial preoccupation with the heroes' quest has to do, above all, with the quality of life to be lived, rather than its quantity" (1969, p. 5). This confirms Tuan's (1986) culture/nature dichotomy which he uses to explain the age-old fascination humans have with strangers and what lies beyond the known. In his terms, culture refers to the changes we have made in nature, by naming parts of it, taming it for our use, and ordering it. Outside this familiar world is nature which is both frightening and alluring. For some expatriates, staying home is maintaining the culture or the "quantity" of life; going abroad is adventuring into nature and searching for a higher "quality" of life, something "more."

Mythical heroes, like humans, also face paradoxes.

"Myths of the hero portray the perennial necessity to resolve the tension of antithetical forces even while accepting conflict as inherent within the universe. To realize that it is first and foremost, through the interplay and clash of polarities, that life energy is released. To recognize that all of the oppositions with which we must contend are also complementary, yet ever to do battle in favor of the generative, as opposed to what would destroy. The hero intuitively secedes from the death-dealing, in favor of that which revitalizes." (Norman, 1969,p. 6)

Myths constitute a shared cultural context for communication. The following elucidates Levi-Strauss's work at deducing the structure of the mind from the myths it creates.

"the mind has a rhythm of opposites in which every conscious point has an unconscious counterpoint....
Myths are held to contain a universal, primitive, non-rational logic which in contemporary societies has been buried beneath technical reason. ... Myths are ways of teaching unobservable realities by way of observable symbols... Mythic logic is a reiterated dialectical code that runs through stories like a musical score and contains the universal structures of mind itself." (Hampden-Turner, 1981, p.198)

The idea of paradox, the topic of the next section, emerges from the literature on heroism, myth, and from the expatriate experience.

Paradox.

"In formal logic a contradiction is the sign of defeat; but in the evolution of real knowledge it marks the first step in progress towards victory."
Alfred North Whitehead

"We stand in a turmoil of contradictions without having the faintest idea how to handle them: Law/Freedom; Rich/Poor; Right/Left; Love/Hate - the list seems endless. Paradox lives and moves in this realm; it is the art of balancing opposites in such a way that they do not cancel each other but shoot sparks of light across their points of polarity. It looks at our desperate either/or and tells us they are really both/ands - that life is larger than any of our concepts and can, if we let it, embrace our contradictions."
Mary C. Morrison

The term paradox, derived from the latin root, means "apparent contradiction". While there are various definitions available, for the purpose of this research, paradox is defined as the presence of contradictory, mutually exclusive elements that operate equally at the same time (Quinn & Cameron, 1988). Paradox is a mental construct that exists only in the thoughts or interpretations of the individual.
Paradoxical thinking has long been found in Eastern religion and philosophy with its emphasis upon the inner unity of opposites. Jung worked hard at synthesizing Eastern and Western thought. Like the Eastern mystics, he believed that opposites were necessary for the articulation of unity, or antinomy, the totality of inner opposites. He believed that "meaning was found in the paradox that resulted from the juxtaposition of opposites, each searching for its complementary side in the drive for unity" (Smith & Berg, 1987, p. 26).

Paradoxical thought is also found in modern physics. Von Bertalanffy claims that the ultimate reality is a unity of opposites, the 'coincidentia oppositorum', complimentary aspects of one and the same reality. The Gestalt theory of perception provides a clear example; only in relation to a contrasting background can an object or event be perceived. What we call light is really a light figure standing out against a dark background. Thus, light and dark are two complementary aspects of one single sensory gestalt (Wilber, 1979).

In recent years, paradoxical thinking has been linked to creativity and scientific breakthroughs. Rothenburg (1979) formulated the concept of "Janusian thinking" while studying the accomplishments of well-respected artists and scientists.
"In Janusian thinking, two or more opposites or antitheses are conceived simultaneously, either as existing side by side, or as equally operative, valid, or true. In an apparent defiance of logic or of physical possibility, the creative person consciously formulates the simultaneous operation of antithetical elements and develops those into integrated entities and creations. It is a leap that transcends ordinary logic. What emerges is no mere combination or blending of elements: the conception does not only contain different elements, it contains opposing and antagonistic elements, which are understood as coexistent." (Rothenburg, 1979, p.55)

Barron's (1968) three decades of research on creative people indicates that such people score higher than average on measures of ego strength and lower than average on measures of anxiety, depression, schizophrenia and deviance. He claims that highly creative people deliberately challenge, destabilize, frustrate and disintegrate themselves in order to reassemble the parts better.

"They disorder themselves in order to create new order from disorder; they doubt so as to become more certain and to doubt again... Indeed the whole concept of 'paradox' may be nothing more than a failure to comprehend recursive systems which operate in patterns of mutual restraint and coordination" (Hampden-Turner, 1981, p. 112).

It is possible that this is the same process that expatriates undergo when they purposely open themselves up to another culture and to paradoxes. In doing so, they destabilize themselves and create chaos, but once they have assimilated the frame of reference of the other culture, order, in the form of biculturalism, is recreated. Gurman (1988) found that students who studied abroad increased
their level of creativity in a pre-post-test experiment whereas students who took the same course in the United States did not. Therefore, it may be possible that the overseas experience can generate more creativity in expatriates.

Two significant works in the field of organizational behavior have made use of the concept of paradox. Quinn's book, BEYOND RATIONAL MANAGEMENT, is an attempt to move away from traditional, bipolar theories to interpenetrating organizational theory that acknowledges paradox. He states that master managers have the ability to employ managerial approaches that appear paradoxical but are necessary for well-functioning organizations. As in the current investigation, Quinn concluded that ego development and cognitive complexity are important competencies for handling paradox.

The second organizational behavior theory that uses the concept of paradox is Smith and Berg's (1987) identification of the paradoxical elements of group life. They employ 3 criteria for their paradoxes (1) an awareness of the presence of opposing or contradictory forces; (2) an acknowledgement and understanding that these are natural and inevitable forces that attend individual and collective life; and (3) an assertion that these contradictory forces are somehow linked or connected (p. 45). As with other
writers on paradox, they too believe that a framework exists that can give meaning to the contradictions or coexisting opposites.

**Paradoxes in the Expatriate Literature.** Some authors have mentioned the paradoxical nature of the expatriate experience (Adler, 1974; Gonzalez & Negandhi, 1967; Heath, 1960, Simmel, 1950; and Torbiorn, 1982) but usually in an abbreviated or anecdotal fashion. The paradoxes that have been mentioned in the sojourn literature are described below.

Gonzalez & Negandhi's (1967) report on U.S. expatriates concludes that the expatriate's life contains many paradoxes. Several of their examples are included in the current investigation.

Many of the paradoxes identified by Gonzalez & Negandhi and others concern the expatriates' sense of identity. For example, they found their subjects identified themselves with the nationals of the host country and had developed empathetic relationships with them, yet they worried about their children's lack of opportunity to identify with the American culture.

The question of how much of one's identity must be given up in order to acculturate is another identification theme nicely phrased by Gonzalez & Negandhi:

"An even greater paradox is represented on the one hand by the love of country and desire to serve it
and on the other by the need to lose one's identity as an American to the point that successful accommodation in the host country may be achieved. These conflicting demands imposed upon the expatriate are not clearly recognized nor understood at home. The executive is asked to walk a fine line, and marked variance one way or the other is cause for immediate criticism. If he is too unyielding and committed to everything American, he is criticized by his hosts as well as his colleagues. If accommodation is complete, then he is said to have gone native, implying that he can no longer carry out his complex role as a representative of his firm and country." (Gonzalez, p. 106-107)

This paradox was also noted by Heath (1960) in his study of Bolivian Peace Corps volunteers. He described one side of the paradox as the volunteers' "local identification"; the other side was their acute awareness of their role as representatives. Heath also noted that this identification with the local culture was accompanied by a self-righteous superiority to other Americans who lived in the "golden ghetto", i.e., the expatriate business people, the diplomatic service, and the development workers. This inverse snobbery is based upon the volunteers' belief that the other American groups do not possess the same degree of cultural understanding as the volunteers who live closer to the people. In a sense, this is another paradox. At the same time the volunteers work hard to represent their own country, they look down on other Americans who do not possess the same acculturation strategy that they do.
Although he did not frame it as a paradox, Zajonc (1952) wrote that strangers are to some extent expected to conform to the norms of the host culture but because of their unique role, they can enjoy a certain exemption from conformity. Thus, the expatriate is both free and not free of the other culture's constraints.

Simmel (1950) wrote that strangers are by definition dualistic because they represent the unity of nearness and remoteness. They come into contact with people in the foreign culture but are not organically connected to them. Therefore, they have a particular brand of "objectiveness" that is both involved and indifferent at the same time.

Expatriates perform a variety of roles: representative of the parent company, ambassador without profile, and temporary citizen of the host country (Gonzalez & Negandhi, 1967). Torbiorn frames the expatriate experience in terms of role theory. Both the parent company and the host country stakeholders have expectations that contribute to the expatriate's conception of the role and leads to the actual role behavior. Torbiorn identifies the usual difficulties that accompany the expatriate role: (1) unclear and/or contradictory expectations from both headquarters and the local office about the expatriate role; (2) inadequate communication about the expatriate's behavior; (3) incompatible expectations; (4) and the
expatriate's personal interests, values and abilities that may be in conflict with the role others expect him or her to play.

The different perspectives and interpretations of multiple roles can result in conflict (Shibutani, 1963). Shetty (1971) characterized the expatriate as "a man in the middle, endlessly beset by conflicting loyalties and demands." Perlmutter once said the expatriate has "multiple loyalties" (Torbjorn, 1982, p. 35). Brooke and Remmers (1970) describe the "buffer situation" that occurs when the expatriates' loyalties and values lie with the local company. They may have to follow directives from Headquarters that conflict with the local values and/or their own values. Yet the parent company sees expatriates as representatives of the local company and may even blame them for local resistance to their directives. In today's jargon, the expatriate is a "boundary spanner" whose job is to interpret the host culture company to headquarters and vice versa. This means that choices must occasionally be made about which side to favor in a given situation, a source of conflict for the expatriate, particularly if the expatriate appreciates the positions of both sides. Such choices then influence how both sides perceive the expatriate (Brooke & Remmers, 1970).
This is the only paradox for which resolutions are identified in the literature. Torbiorn (1982) states that there are no general solutions; sometimes power differences between the two sides make a decision simple. In other instances, the two parties agree upon priorities. Sometimes expatriates take advantage of their middleman role and keep knowledge from one side or another. Brooke and Remmers (1970) found that expatriates judiciously ration the information they pass on to headquarters in order to protect their degrees of freedom. Shetty (1971) stated that in order to reach compromise between the two groups, expatriates must foresee possible causes of conflict and be able to integrate attitudes and points of view from the two cultures. To do so, they must be capable of acting independently of both sides.

In addition to their role as boundary spanner between two companies, they also interpret and mediate between at least two cultures. At the same time they are representing their own country, they are becoming more aware of its disadvantages as a result of their contact with the other culture. Once again, Gonzalez & Negandhi (1967) do an excellent job of describing this paradox in the following quote.

"Many expatriates stated that they were determined not only to prove themselves in international business activity, but also to prove the merit of the American way of life including the American way of doing
business. A sense of mission and love of country was expressed by a large majority. Paradoxically, when weighing advantages and disadvantages of the foreign life, the respondents admitted that there were many things about the American way of life which they deplored, but apparently they could separate these from the basic structure and tenets of American society." (p. 106)"

Since the time of that study, American expatriates may have toned down their evangelistic fervor to show the world the American way, but trying to put one's best foot forward is still an aspect of expatriate life that sometimes conflicts with the reality of life at home.

This representation of an ideal while being aware of a conflicting reality can also occur with one's organization. Heath (1960) wrote that the volunteers who were most critical of Peace Corps were also those who vigorously defended it to outsiders. He attributed this to their idealism, loyalty, and desire for Peace Corps to be perfect.

Heath (1960) described the Bolivian Peace Corps volunteers as having a "proud humility." "He takes quiet pride in his ability to 'make do,' to 'scrounge' supplies from somewhere, anywhere, in order to get on with the job" (p. 283). Although volunteers show pride in their accomplishments in conversation, they publicly share the credit with the Bolivians or with Peace Corps as a group. This "proud humility" could be characterized as an example of enacting heroism, i.e., "hero talk."
Peter Adler's (1974) essay on "multicultural man" (and presumably woman) is another source of expatriate paradoxes. He wrote that such a person would be committed to essential similarities between people while paradoxically maintaining an equally strong commitment to their differences. His or her identity would not be bound to a particular culture; in fact Adler equates "belonging" to a culture as either owning or being owned by it. Instead, multicultural man would possess a style of self consciousness that is capable of negotiating ever new formations of reality. As such, he is neither a part of nor totally apart from his culture; he lives instead on the boundary between the two.

Two more paradoxes have to do with personal self awareness and development. The first maintains that as individuals experience new and different dimensions of human diversity, they learn more about themselves. Thus, learning more about others leads paradoxically to self-knowledge. Hall (1959) and Hall and Whyte (1963) found that time spent in another culture may bring aspects of the sojourner's own culture into awareness. Formerly unconscious cues for communication become visible because they are no longer useful in the new culture. This implies a figure-ground switch in Gestalt psychology terms.
The second paradox concerns the expatriates' personal boundaries and orientation. In his discussion of the vulnerability of multicultural man, Adler (1974) wrote that,

"Where the configuration of loyalties and identification is constantly in flux and where boundaries are never secure, multicultural man lays himself open to any and all kind of stimuli. In the face of messages which are confusing, contradictory, or overwhelming, the individual is thrown back on his own subjectivity with which he must integrate and sort out what he allows himself to take in" (Adler, p. 373)

Thus, as expatriates become ever more worldly and assume a macro orientation to the world, they became more and more idiosyncratic about how much of that broadened world they will take in and how they make sense of it. Furthermore, multicultural man also undergoes the paradoxical disordering and reordering of his or her identity that Barron (1968) described in creative people.

"Multicultural man, embodying, as he does, sequential identities, is open to the continuous cycle of birth and death as it takes place within the framework of his own psyche. The lifestyle of multicultural man is a continual process of dissolution and reformation of identity; yet implicit in such a process is a sequence of growth. Psychological movements into new dimensions of perception and experience tend very often to produce forms of personality disintegration. But disintegration is the basis for developmental thrusts upward, the creation of new evolutionary dynamics and the movement of personality to a higher level" (Adler, 1974, p.375).

In summary, several types of expatriate paradoxes have been mentioned in the literature: cultural
identification/acculturation, freedom from/adherence to host culture constraints, conflicting local and headquarters loyalty, representation of the ideal versus the real, other/self awareness, the macro/micro orientation, and the disordering/reordering of identity. The expatriate experience is characterized by multiple roles, balancing between two cultures, and being forced to confront one's own cultural illusions and thinking as usual, usually on one's own. It comes as no surprise that paradox would be inherent in this context. What is surprising is the lack of attention this topic has received in the academic literature. Autobiographical and fictional works contain more references to paradox. One of the major purposes of this investigation is to elaborate upon these paradoxes and to study them empirically for the first time.

With the exception of the conflicting headquarters/local loyalties, nothing has been written about how expatriates handle paradox. Acceptance of both truths, reframing and looking for a higher unifying principle are common ways of dealing with paradox (Quinn, 1988; Quinn & Cameron, 1988; Smith & Berg, 1987). The next section addresses other competencies for handling paradox.
Competencies

Three competencies were identified inductively by studying the paradoxes outlined in the introduction. Ego development, incongruity tolerance, and social acuity will be introduced in the following paragraphs.

Identity Integration. Many of the paradoxes have to do with either relinquishing native values or taking on values of the other culture. All but the most buffered expatriates expose themselves to different cognitive maps or frames of reference. Whenever empathy is practiced, one runs the risk of being changed or transformed (Rogers & Farson in Kolb, Rubin & McIntyre, 1984). The underlying theme of the paradoxes involving identity integration hinges upon the question, "How much of myself do I have to give up in order to be accepted and successful in another culture and how much can I give up before I experience a sense of loss of identity?" This requires a strong sense of self. People with strongly defended personalities will not allow themselves to experience the other culture; those with a weak sense of self are likely candidates to "go native."

A strong, stable character has been identified as an important selection criteria for overseas work (Harris, 1973), even though it has not been specifically connected with paradoxes in the expatriate literature. However, both Torbert (1987) and Quinn (1988) claim a relationship
between high levels of ego development as measured by Loevinger (1966, 1976) and the excellent managers they describe who handle paradox well.

Peter Adler, one of the more profound writers on cross-cultural issues, maintains that the expatriate experience, a transitional experience, can stimulate ego development. Loevinger also agrees with this hypothesis although it has never been empirically tested (personal conversation, 1989). The conflict and tension inherent in the transitional experience makes possible "the transcendence from environmental to self support" (Perls, 1969). Becker (1972) describes "the borrowed self" that is created from ones parents, relatives and culture without much personal thought or effort. The individual who is forced to examine his or her life can then proactively and creatively assemble or reassemble some parts of the self. Interestingly, this is Campbell's definition of the modern day hero, the person who has discovered his or her "self" and does not merely imitate others.

"The modern hero, the modern individual who dares to heed the call ...cannot, indeed must not, wait for his community to cast off its slough of pride, fear, rationalized avarice, and sanctified misunderstanding. It is not society that is to guide and save the creative hero, but precisely the reverse. (1968, p. 391),

Loevinger's measure of ego development was selected to measure identity integration in this study.
Hers is a developmental model that conceives of ego development as the "master trait" in personality, "the frame that provides more specific traits with their meaning and around which the whole edifice of personality is constructed" (Loevinger, 1976, p. 41). According to Loevinger, ego development proceeds in a sequential hierarchical fashion. The stages of ego development are presented in Table 2.3. The stages range from the simple, undifferentiated stage, where the individual is self-centered and a victim of the environment, to a complex, differentiated, and integrated stage where the individual can influence the environment and is capable of deep relationships with other people. Each stage represents a structural shift from the previous stage and is a configuration of four major developmental components: cognitive complexity, impulse control, interpersonal relationships, and conscious preoccupation.

The cognitive complexity component refers to one's mode of organizing information, i.e., one's style and ability in differentiating elements, handling opposites, grasping contingencies, recognizing patterns, tolerating ambiguities, and so forth. Impulse control refers to the manner of attending, curbing and balancing inner needs in one's dealings with the world. The interpersonal relationships component describes one's mode of
construing, relating and interacting with others. Conscious preoccupation represents the focal themes that one thinks about at different stages of development.
### Table 2.3 Loevinger's Stages of Ego Development

<table>
<thead>
<tr>
<th>Ego Level</th>
<th>Impulse Control/Character Development</th>
<th>Interpersonal Style</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Impulsive</td>
<td>Does not recognize rules</td>
<td>Dependent and exploitative:</td>
</tr>
<tr>
<td></td>
<td>sees action as bad only if punished</td>
<td>dependence unconscious</td>
</tr>
<tr>
<td></td>
<td>Impulsive</td>
<td>Treats people as sources of supply</td>
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<tr>
<td></td>
<td>Afraid of retaliation</td>
<td></td>
</tr>
<tr>
<td>II Self-protective</td>
<td>Recognizes rules but obeys for immediate advantage</td>
<td>Manipulative and exploitative</td>
</tr>
<tr>
<td></td>
<td>Has expedient morality: action is bad if person is caught</td>
<td>Wary and distrusting of others' intentions</td>
</tr>
<tr>
<td></td>
<td>Blames others: does not see self as responsible for failure or trouble</td>
<td>Opportunistic</td>
</tr>
<tr>
<td>III. Conformist</td>
<td>Partially internalizes rules; obeys without question</td>
<td>Zero-sum: I win you lose</td>
</tr>
<tr>
<td></td>
<td>Feels shame for consequences</td>
<td>Shameless: Shows little remorse</td>
</tr>
<tr>
<td></td>
<td>Concerned with &quot;shoulds&quot;</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Morally condemns others views</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Denies sexual and aggressive feelings</td>
<td></td>
</tr>
<tr>
<td>IV. Conscientious</td>
<td>Standards self-evaluated: morality internalized</td>
<td>Wants to belong to group, to gain social acceptance</td>
</tr>
<tr>
<td></td>
<td>Self-critical. Tendency to be hypercritical</td>
<td>Feels mutual trust within in-group prejudice</td>
</tr>
<tr>
<td></td>
<td>Feels guilt for consequences</td>
<td>Concerned with communication, expression of differentiated feelings</td>
</tr>
<tr>
<td>V. Autonomous</td>
<td>Add: Behavior an expression of moral principle</td>
<td>Has sense of responsibility obligation</td>
</tr>
<tr>
<td></td>
<td>Tolerates multiplicity of viewpoints</td>
<td>Has mutual, Intensive relationships</td>
</tr>
<tr>
<td></td>
<td>Concerned with conflicting duties, roles principles</td>
<td>Concerned with multiplicity of viewpoints</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Add: 'Wants autonomy in relations</td>
</tr>
<tr>
<td>VI. Integrated</td>
<td>Add Reconciles inner conflicts and conflicting external demands</td>
<td>Sees relations as involving inevitable mutual interdependence</td>
</tr>
<tr>
<td></td>
<td>Renounces the unattainable Concerned .with justice</td>
<td>Tolerates others' solutions of conflict</td>
</tr>
<tr>
<td></td>
<td>Spontaneous, creative</td>
<td>Respects others autonomy Open</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Add: Cherishes Individuality</td>
</tr>
<tr>
<td>Ego Level</td>
<td>Conscious Preoccupation</td>
<td>Cognitive Style</td>
</tr>
<tr>
<td>----------------</td>
<td>----------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>I. Impulsive</td>
<td>Sex and aggression</td>
<td>Thinks in dichotomous way</td>
</tr>
<tr>
<td></td>
<td>bodily functions</td>
<td>Has simple global ideas</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Conceptually confused</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Thinks concretely</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Egocentric</td>
</tr>
<tr>
<td>II Self-protective</td>
<td>Self-protection Gaining</td>
<td>At above</td>
</tr>
<tr>
<td></td>
<td>control and advantage, dominating</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Gaining the better of others deceiving them</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fear of being dominated, controlled, or deceived by others</td>
<td></td>
</tr>
<tr>
<td>III. Conformist</td>
<td>Appearances</td>
<td>Thinks stereotypically</td>
</tr>
<tr>
<td></td>
<td>Social acceptance and adjustment to group norms</td>
<td>Uses cliches</td>
</tr>
<tr>
<td></td>
<td>Status symbols material</td>
<td>Sees in terms of superlatives</td>
</tr>
<tr>
<td></td>
<td>possessions reputation and prestige</td>
<td>Has sentimental mentality</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Has little introspection</td>
</tr>
<tr>
<td></td>
<td></td>
<td>references to inner</td>
</tr>
<tr>
<td></td>
<td></td>
<td>feelings are banal and stereotyped</td>
</tr>
<tr>
<td>IV. Conscientious</td>
<td>Achievement of long-term goals as measured by inner standards</td>
<td>Conceptually complete</td>
</tr>
<tr>
<td></td>
<td>Attaining ideals</td>
<td>Has sense of consequences, priorities</td>
</tr>
<tr>
<td></td>
<td>Motivation, reasons for behavior</td>
<td>Aware of contingencies</td>
</tr>
<tr>
<td></td>
<td>Self: feelings, Traits</td>
<td>Sees self in context of community, society</td>
</tr>
<tr>
<td>V. Autonomous</td>
<td>Individually and self-fulfillment</td>
<td>Has greater conceptual complexity</td>
</tr>
<tr>
<td></td>
<td>Conflicting Inner needs</td>
<td>Tolerates ambiguity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Has capacity to see paradox, contradictions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Has broad scope of thought</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(time frame, social context)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Perceives human interdependence</td>
</tr>
<tr>
<td>VI. Integrated</td>
<td>Add: Integrated sense of unique identity &quot;Precious lifes work&quot; as inevitable simultaneous expression of self principle and one’s humanity</td>
<td>Add: Has sense of self as part of flow of human condition</td>
</tr>
</tbody>
</table>
Loevinger's concept of ego development is appropriate for this study for several reasons. Her taxonomy includes the ability to perceive and deal with paradoxes. This ability begins at the fifth level, the Autonomous stage. Furthermore, the inclusion of cognitive complexity as a major component of this model is obviously appropriate for dealing with paradoxes and appreciating cultural differences. Loevinger states that ego development determines how the world is perceived. Since so much of the cross-cultural experience pertains to reading meaning into a novel situation and changing cognitive maps, Loevinger's symbolic conception of the ego seemed appropriate for this study. Furthermore, the developmental nature of her theory fits with Adler's hypothesis that the expatriate experience can stimulate ego development.

**Incongruity Tolerance.** The comfort with which one embraces paradoxes or contradictions may be determined by the ability to tolerate incongruity. This competency relates to a basic cognitive need for matching reality to one's expectations. Driver and Streufert claim that individuals achieve a certain level of adaptability, i.e., expectations, to incongruity as a result of their past experiences with incongruity. They will then seek or avoid incongruity or uncertainty in order to keep their expectations and perceptions consistent. The concept of
adaptability levels was first developed by Helson (1959). Streufert and Driver (Streufert & Streufert, 1978) have named their version of it the General Incongruity Adapation Level (GIAL). They contend that a person's GIAL can change over time as a person acquires more exposure to incongruity. Individual or cultural differences in the GIAL reflect past experiences; a childhood or culture characterized by turbulence and unmet expectations will produce a high GIAL. It is interesting to note that an individual may not prefer or be consciously comfortable with his or her GIAL, because it refers to a cognitive style and not a preference style. Deviations from the GIAL are accompanied by affect arousal which are either increasingly negative or initially positive and subsequently negative as the distance from the GIAL increases (Streufert & Streufert, 1978).

The GIAL has been found to correlate negatively with a Rokeach's Dogmatism measure ($r=-.17$). It also correlates negatively ($r=-.43$) with Budner's (1962) measure of intolerance of ambiguity. Budner's measure focuses on the emotional response to ambiguity where the GIAL measures the cognitive response. The GIAL has also been found to correlate slightly but significantly with Holmes and Rahe's (1967) measure of social adjustment (Lee, 1974). Lee also found that the GIAL correlated negatively with age. Driver
(1984) hypothesizes that this would be true in stable environments; the opposite would be true in turbulent environments.

Driver writes that "a person's GIAL should influence behavior in any situation where novelty, uncertainty, conflict, frustration, etc. are critical aspects" (1984, p.4). Therefore, it appears to be a useful concept to apply to the expatriate setting which is characterized by an extremely high degree of uncertainty. The GIAL has been used successfully to screen potential expatriates (Driver, personal conversation, 1988). One would expect people with low scores to experience more frustration during the overseas experience and a greater need to make it predictable for themselves.

**Social Acuity.**

"If a map is accurate and you can read it, you won't get lost; if you know a culture, you will know your way around in the life of a society." Kluckhohn

The image of myself which I try to create in my own mind in order to love myself is very different from the image which I try to create in the minds of others that they may love me." Auden

Since the basis of culture shock is commonly related to the inability to read social cues (Oberg, 1960) and a lack of social learning (Furnham & Bochner, 1986), social acuity is a logical dimension of effectiveness for expatriates. For the purposes of this study, it includes
both the ability to read social cues and to modify one's behavior accordingly. Hoopes (in Ratiu, 1983) states that multiculturalism involves the following: "the skills necessary to feel comfortable and communicate effectively (1) with people of any culture encountered and (2) in any situation involving a group of people of diverse cultural backgrounds" (p. 141).

Social acuity is particularly important to the awareness of paradox for two reasons. Conceivably, those who cannot read social cues may not be sufficiently attuned to the other culture to perceive paradoxes. Secondly, since effectiveness is defined as the ability to decide which side of the paradox is most appropriate in a given situation, that involves both the ability to judge the situation and a behavioral repertoire that provides for intentionally varied responses.

The measure which I have chosen for this competency is Snyder's (1974, 1980, 1986, 1987) concept of self-monitoring. It is based upon Goffman's metaphor that daily life consists of theatrical performances and the idea that we have public and private selves. Snyder believes that individuals vary in the extent to which they monitor their public appearance of self. Therefore, he categorizes people as either high or low self-monitors. High self monitors see the world as a stage and actively manage the
impressions they make on others. Low self monitors are
guided by the premise, "To thine own self be true." They
value congruence between their private and public selves,
between who they are and what they do. Therefore, they do
not monitor the social environment as rigorously as high
self monitors.

Snyder and his associates have found high self-
monitors are more effective than low self-monitors in (1)
concern for the social appropriateness of their self-
presentation; (2) attention to social comparison
information as cues to appropriate self-presentation; (3)
ability to control and modify self-presentational and
expressive behavior; (4) the use of this ability in
particular situations; and (5) cross-situational
variability in behavior.

It may sound as if high self-monitoring is the more
desirable state. In fact, high self-monitors sometimes
are perceived as inconsistent, untrustworthy, and too
concerned about managing their impression on others. In
his study of what makes managers considered by their peers
to be "most international", Ratiu (1983) made the following
discoveries. In an anonymous peer review, 10 percent of
the 250 executive MBA students at INSEAD were judged by at
least 4 of their peers to be "most international." The
adjectives used as criteria were "adaptable, flexible,
open-minded, has many friends of different nationalities, speaks with others in their own language, etc." (p. 140). However, negative adjectives were also applied to this group - "chameleonlike" and "unplaceable.". Ratiu's interpretation of this finding is that being considered international is not entirely positive and he reminds the reader that retrenching societies have occasionally outlawed "internationalism" and "cosmopolitanism." A more social psychological explanation of the chameleon description is that the "most international" may be very high self monitors who modify their behavior with each interaction. One of the quotes that Ratiu includes from a "most international" subject clearly describes Snyder's high self-monitor, "You're forever testing. Even when you're saying it, you watch how they're reacting; and if you're getting into something that's not coming across, then you either back away or ..." (p. 141). While we may admire such behavioral agility, it is also a quality that does not inspire trust.

There has been some controversy surrounding the scale's construct validity (Briggs, Cheek & Buss, 1980). However, Snyder (1974, 1979) tested the scale with 4 different populations and found it to be a reliable, valid measure. He has also modified the scale slightly in response to criticism (Snyder, 1987).
Summary

The literature on the sojourn experience of expatriate business people is relatively limited and has focused primarily upon selection and training, adjustment, effectiveness, and, to a lesser degree, repatriation. In general, the research is lacking in both theory and depth since much of the literature is descriptive or anecdotal. Rigorous qualitative studies and longitudinal designs are noticeably absent. There has been little emphasis upon the subjective experience and its meaning to the expatriate.

The transformation that strangers and expatriates undergo has been described by various authors as a process of acquiring new cognitive maps. Expatriates are forced to confront their own culture, values, basic assumptions, thinking as usual, and their character when exposed to another culture. Things which were formerly taken for granted become figural as the expatriates struggle to decode the rules of the new culture and learn how to be socially reinforced within it.

This challenge takes on the nature of the mythical hero's adventure. Heroism is described by both Rank and Becker as a means of coping with the basic paradox, fear of life/death, that faces humans. Modern society has failed to provide hero patterns which appeal to many of its members. However, the overseas experience offers people an
opportunity for both adventure and proving themselves. While the literature on expatriates mentions that adventure is a reason for accepting the overseas assignment, the idea of heroism and the use of the hero's adventure myth has never been applied to this population.

With the exception of the conflicting loyalties question, the area of expatriate paradoxes has not been well developed nor empirically researched. As a consequence, no prior studies have examined the competencies required for dealing with expatriate paradoxes or the relationship between paradoxes and acculturation and effectiveness.

Research Questions and Hypotheses

The purpose of this study is to yield a better understanding of the expatriate experience. The specific objectives are to: (1) assess whether the hero metaphor is a useful framework for describing the expatriate experience; (2) explore whether the explicated paradoxes, and perhaps others, were experienced by a sample of expatriate business people; (3) determine whether the degree of cultural involvement influences the awareness of paradox; (4) ascertain if the expatriates who experienced the paradoxes do possess the three competencies; and (5) determine whether a positive relationship exists between
these competencies and acculturation and effectiveness abroad.

The two research questions are:
1) Do expatriate stories reflect the transformational nature of the hero's adventure metaphor?
2) Do expatriates experience paradoxes and, if so, what are they?

The hypotheses are:
H1. There will be a positive relationship between the awareness of paradox and degree of cultural involvement.
H2. There will be a positive relationship between the awareness of paradox and the three competencies (identity integration, incongruity tolerance and, social acuity).
H3. There will be a positive relationship between the awareness of paradox and acculturation.
H4. There will be a positive relationship between the awareness of paradox and effectiveness.

Research Models

The model for the qualitative inquiry is Campbell's diagram of the basic hero's adventure plot found in myths all over the world and in Figure 2.1. The obstacles in this model are represented by the expatriate paradoxes in this study.
The conceptual model for the quantitative portion of the research, which focuses on the paradoxes, is presented in Figure 2.2. In this model, degree of cultural involvement, awareness of paradox, and the competencies covary - a change in one stimulates a change in the other two. The assumption underlying this model is that these three factors lead to acculturation and then effectiveness. The following chapter explains how the research questions and hypotheses are operationalized and measured.
THE MYTH OF THE HERO’S JOURNEY

Joseph Campbell

A MAGICAL FRIEND

THE CALL

OBSTACLES

THE RETURN

TRANSFORMATION
CHAPTER THREE

METHODOLOGY

Overview

In their heart of hearts, perhaps all doctoral students see writing a dissertation as a heroic journey. The purpose of this section is to retrace the researcher's adventure for the reader. In simplest terms, the research methodology was used to (1) ascertain the usefulness of the hero metaphor and the presence of paradox in the expatriate experience and (2) investigate the relationships among awareness of paradox and cultural involvement factors, competencies, acculturation, and effectiveness. In this chapter, the research design, subjects, procedures, and the statistical analyses used in the investigation are described.

General Background

This research is an attempt to build and in part test a grounded theory about expatriates. The research questions and hypotheses are based upon my experiences
and observations of expatriate life. The expatriate literature's omission of the concepts of heroism and paradox did not fit with my observations.

I chose to explain whether heroism was a useful framework via qualitative methods for several reasons. First, I viewed the study as an exploration that would uncover aspects of expatriate life that were not easily quantified or captured. Secondly, the nature of the metaphor itself was not one that would easily permit direct questioning or a frontal attack. As Becker (1973) stated, people seldom acknowledge that they are enacting heroism to deny the reality of death. Thirdly, I was not sure whether the heroism metaphor was the only one I might find and I wanted to leave open the possibility of other discoveries.

The starting point for the quantitative portion of the study was to test for the presence or absence of paradox in the expatriate experience. The first step was to explicate a list of nine paradoxes from my own experience and observations that could be presented to the expatriates.

The next logical step was to ask the question, "Do all expatriates experience these or other paradoxes?". This led to an assumption that one factor which might influence the perception of paradox was the expatriate's involvement
with the other culture. Presumably, the greater the degree of cultural involvement, the more paradoxes a person would experience. Cultural involvement is defined as "the extent to which the expatriate 'enters' the other culture or is in an interdependent relationship at work." For example, the general managers who are not figureheads but hands-on managers who have to work through people to accomplish tasks would be predisposed to have greater cultural involvement than a researcher working alone or with a small team and with no supervisory responsibility. Other factors that might influence cultural involvement are the personal characteristics of the subjects, such as demographic factors, ability to speak the language, and previous international experience. Therefore, those who have, for example, more experience at entering cultures or who speak the language well should also report more paradoxes. In a similar fashion, expatriates who live in cultures that are easily entered may also experience more paradoxes because they have been allowed access to the contradictions. Expatriates who buffer themselves from the local culture should theoretically be less aware of these paradoxes. Three groupings of factors that influence the degree of cultural involvement were developed - work related, cultural, and personal factors.
There are many different types of expatriate experiences. While their experiences are influenced by external, work related factors, cultural factors, and personal factors, this does not mean that the expatriate cannot go beyond these factors and become closely involved in the other culture. It only means that these factors predispose them to a particular degree of involvement. The study tests the hypothesis that the greater the degree of cultural involvement, the greater the awareness of paradox.

To the extent that paradoxes exist, it is logical to consider whether some expatriates cope with them better than others and why. This led to the third portion of the quantitative analysis which investigated whether successful recognition of the paradoxes was related to certain competencies. Three competencies were hypothesized as being crucial for dealing with these paradoxes. These were identified as identity integration, tolerance of incongruity, and social acuity - the ability to read social cues and modify one's behavior accordingly. Thus, the study tests the hypothesis that awareness of paradox is positively related to certain competencies.

The fourth analysis focused upon the question, "Are expatriates who recognize these paradoxes more likely to be acculturated and effective than those who do not?". We assume that greater cognitive complexity is positive and
leads to greater effectiveness. The study tests the hypothesis that awareness of paradox is positively related to both acculturation and effectiveness.

In addition to the assumptions included in the preceding paragraphs, there are additional assumptions upon which this investigation is based.

Research Assumptions

1. Some of the paradoxes and contradictions identified for this study are also faced by managers operating within their own culture. However, the cross-cultural context highlights the importance and degree of significance these issues assume for expatriates.

2. Expatriate managers function as boundary spanners. I am assuming that some of them are attracted to this role and to international work because they already possess some of the competencies required by the role. However, performance of the role may then foster the further development of competencies like cognitive complexity, incongruity tolerance, identity integration, and social acuity.

3. Without doing a longitudinal study, it is difficult to determine whether individuals take expatriate jobs and succeed in them because they already possess the three competencies included in this study. However, the research
is predicated upon the assumption that the more contact an individual has with another culture, either because the job demands it or the individual seeks it, the greater the need for the three competencies.

4. The study utilizes a definition of acculturation that consists of three categories: (1) rejection of the foreign culture; (2) integration of foreign and home culture; and (3) rejection of the home culture in favor of the foreign culture - "going native" (Furnham & Bochner, 1986). The researcher holds a normative belief that expatriate effectiveness is related to the second category of acculturation that involves integration of the two cultures, a bicultural stance.

5. Determination of an expatriate's effectiveness may well vary depending upon whose perspective is sought and the role played by attributions within the particular organization. A true picture of effectiveness may emerge only when one polls all those involved - the organization, the expatriate, his or her peers, host country and third country coworkers or subordinates, and the client/supplier network, in addition to sources of objective data. The use of subjects from a variety of organizations limits the operationalization of effectiveness to expatriate self-reports and their recollection of the organizations' evaluations of their work.
6. This study assumes that acculturation is a prerequisite for effectiveness since it is difficult to imagine an international situation in which an expatriate could succeed without making any attempts to adapt to the local culture. Perhaps there are some types of jobs that require little acculturation and interaction with the host country culture. However, Tung (1987) identified interpersonal skills as a key factor in expatriate success. Acculturation does not automatically lead to effectiveness, but it does appear to be a prerequisite.

Research Design and Statistical Analysis

The research design is partly exploratory and partly a retrospective correlational study. The study was designed to facilitate measurement triangulation. The exploratory section of the study, concerning the hero metaphor, is a qualitative study of returned expatriates that employs a structured interview. The interview consists of questions that invite the subjects to tell the story of their overseas experience (see Appendix F for the interview protocol). These interviews were taped, transcribed, and content-analyzed for common themes.

The quantitative portion of the study focuses upon the relationships between the awareness of the paradoxes, the factors that permit cultural involvement, the competencies,
and acculturation and effectiveness. The pre-interview battery of instruments elicited demographic and organizational data and measures of the three competencies. Toward the end of the interview, the acculturation and effectiveness instruments were administered. Factor analysis was used with the paradoxes. All the other analyses made use of Pearson Product moment correlations.

Subjects

Selection. The investigator contacted Directors of Human Resources departments, law firms who handle expatriate visas, and the Cleveland World Council to request names of returned expatriates who met the selection criteria. The subjects had to meet the following criteria: (1) an American business person, (2) abroad for at least 18 months, and (3) repatriated no earlier than 1980, and preferably no earlier than 1983. Only those subjects who had been abroad for over 5 years were accepted if they were repatriated as early as 1980. These sources suggested names of possible subjects, who in turn identified more candidates. Because lack of research funding prohibited travel, contacts were limited to corporations in the Cleveland-Akron area. All but one major corporation allowed access to their employees; however their employees were
under no pressure to participate. The researcher-subject relationship was a direct one, not mediated by the specific organizations who merely provided names. Of the 39 possible subjects contacted, all but four agreed to participate. Quite frankly, there are probably very few remaining expatriates in the Cleveland area who fit the selection criteria, which is an indication of the number of expatriates Cleveland companies are sending abroad.

Subjects were told that the purpose of the study was to learn more about the expatriate experience and that it would involve (1) filling out an hour's worth of questionnaires and (2) undergoing an hour and a half interview. At this point they were asked if they would be willing to participate.

It is possible that this sample is more positive about their overseas experience than the general population of expatriates. Only one person requested an early return because he was dissatisfied. Another expatriate was forced to return early, much against his will, because his children were doing poorly in school. This early return rate is much lower than the 30% figure quoted in the literature (Tung, 1981). People who had negative experiences and quit their companies upon return would not be located by the method of locating a sample that was used for this study.
It was feared that the original goal of obtaining a very heterogeneous sample in terms of gender, occupation, industry, and country of assignment might be seriously hampered by the limited number of returned expatriates in Cleveland. However, as the next section will reveal, a fairly heterogeneous sample did result in every aspect except gender.

Description. Table 3.1 shows the number of subjects (N=35) from each of the 16 companies. Four of the companies are chemical firms, 2 are oil and mining companies, 2 banks, 2 accounting firms, 1 electronic firm, 1 law firm, 1 tire company, and 3 automotive and defense companies. Unfortunately, only two female expatriates were located; the rest of the subjects are male (94.3%). The subjects range in age from 27-62 with a mean age of 41.2 (SD=8.4). At the time of their overseas assignment, the average age was 35.7 years (SD=7.9) with a range of 23-56. Table 3.2 indicates the number of subjects in each age category both now and at the time of their overseas assignment.

The great majority of the subjects (85.8%) were married; all but one subject was married to an American spouse. Three were single (8.6%) and 2 were divorced (5.7%) prior to the assignment. Two of the marriages broke up during the overseas experience.
Table 3.1
Company Affiliation of Expatriates

<table>
<thead>
<tr>
<th>Company</th>
<th>Number of Subjects</th>
<th>% of Subjects</th>
</tr>
</thead>
<tbody>
<tr>
<td>BFGoodrich</td>
<td>3</td>
<td>8.6</td>
</tr>
<tr>
<td>BF America</td>
<td>3</td>
<td>8.6</td>
</tr>
<tr>
<td>Eaton</td>
<td>2</td>
<td>5.7</td>
</tr>
<tr>
<td>Ernst &amp; Whinney</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>Ferro</td>
<td>3</td>
<td>8.6</td>
</tr>
<tr>
<td>First Chicago Bank</td>
<td>3</td>
<td>8.6</td>
</tr>
<tr>
<td>Fluorocarbon</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>GE</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>Goodyear</td>
<td>5</td>
<td>14.3</td>
</tr>
<tr>
<td>Lubrizol</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>M.A. Hanna Mining</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>National City Bank</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>Parker Fannin</td>
<td>3</td>
<td>8.6</td>
</tr>
<tr>
<td>Price Waterhouse</td>
<td>3</td>
<td>8.6</td>
</tr>
<tr>
<td>Squire, Sanders &amp; Dempsey</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>TRW</td>
<td>3</td>
<td>8.6</td>
</tr>
</tbody>
</table>
### Table 3.2
#### Age of Subjects

<table>
<thead>
<tr>
<th>Age Categories</th>
<th>At the time of Assignment</th>
<th>At the time of the Interview</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number Percentage</td>
<td>Number Percentage</td>
</tr>
<tr>
<td>20-29</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>30-39</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>40-49</td>
<td>9</td>
<td>16</td>
</tr>
<tr>
<td>50-59</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>60-69</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

M = 35.7
SD = 7.86
Range = 23-56

M = 41.2
SD = 8.37
Range = 27-62

### Table 3.3
#### Number of Children

<table>
<thead>
<tr>
<th>Number of Children</th>
<th>Number of Subjects</th>
<th>Percentage of Subjects</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>12</td>
<td>34.3</td>
</tr>
<tr>
<td>1</td>
<td>7</td>
<td>20.0</td>
</tr>
<tr>
<td>2</td>
<td>11</td>
<td>31.4</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
<td>11.4</td>
</tr>
<tr>
<td>4</td>
<td>1</td>
<td>2.9</td>
</tr>
</tbody>
</table>
Table 3.3 presents the number of children who accompanied their parents abroad. Twelve of the couples (34.3%) had no children; the largest family consisted of four children. The average number of children per subject was 1.3 (SD=1.15).

There were three different levels of education among the subjects; one subject (2.9%) completed some years of college, 17 subjects (48.6%) were college graduates, and another 17 (48.6%) also had graduate degrees. Table 3.4 reveals the undergraduate and graduate majors of the subjects. The majority of the undergraduate majors were in engineering (31.4%) and business and accounting (28.6%). The most popular graduate degree was in business and economics (31.4%).

The occupations of the subjects appear in Table 3.5. The largest group is composed of general managers (37.1%); the second largest group are engineers and chemists (20.0%). Auditors (14.3%), bankers (11.4%), accountants and lawyers (both 8.6%) comprise the other occupations. The general manager group consists of people from sales and marketing functions, technical and manufacturing functions, and strategic planning.
Table 3.4  
Major Course of Study

<table>
<thead>
<tr>
<th>Undergraduate Majors</th>
<th>Number of Subjects</th>
<th>Percentage of Subjects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineering</td>
<td>11</td>
<td>31.4</td>
</tr>
<tr>
<td>Accounting</td>
<td>5</td>
<td>14.3</td>
</tr>
<tr>
<td>Business</td>
<td>5</td>
<td>14.3</td>
</tr>
<tr>
<td>Chemistry</td>
<td>4</td>
<td>11.4</td>
</tr>
<tr>
<td>Economics</td>
<td>2</td>
<td>5.7</td>
</tr>
<tr>
<td>Social Science</td>
<td>2</td>
<td>5.7</td>
</tr>
<tr>
<td>Geology</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>Math</td>
<td>1</td>
<td>2.9</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Graduate Majors</th>
<th>Number of Subjects</th>
<th>Percentage of Subjects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business and Economics</td>
<td>11</td>
<td>31.4</td>
</tr>
<tr>
<td>Law</td>
<td>3</td>
<td>8.6</td>
</tr>
<tr>
<td>Science and Engineering</td>
<td>2</td>
<td>5.7</td>
</tr>
<tr>
<td>Unknown</td>
<td>2</td>
<td>5.7</td>
</tr>
</tbody>
</table>
Table 3.5
Occupation of Subjects

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Number of Subjects</th>
<th>Percentage of Subjects</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Managers</td>
<td>13</td>
<td>37.1</td>
</tr>
<tr>
<td>Engineer/Chemist</td>
<td>7</td>
<td>20.0</td>
</tr>
<tr>
<td>Auditor</td>
<td>5</td>
<td>14.3</td>
</tr>
<tr>
<td>Banker</td>
<td>4</td>
<td>1.4</td>
</tr>
<tr>
<td>Accountant</td>
<td>3</td>
<td>8.6</td>
</tr>
<tr>
<td>Lawyer</td>
<td>3</td>
<td>8.6</td>
</tr>
</tbody>
</table>
Prior to going abroad, the subjects had worked an average of 7.9 years (SD=5.8) for their companies. The range for this previous tenure was 1 to 21 years; 6 years was the median tenure. The average length of the time they worked abroad was 3.9 years (SD=3.81) with a range of 1 1/2 to 19 years. Table 3.6 presents the number of years the subjects worked abroad. Thirty-one subjects had only one overseas work assignment. Two subjects had a total of two assignments. Only two of the subjects were career expatriates; each had 5 previous assignments and had worked abroad 17 and 19 years, respectively. Four subjects had been abroad once before but as a student or with the military.

Twenty-eight of the subjects (80.0%) lived in only one foreign country; three subjects (8.6%) lived in 2 countries; three (8.6%) resided in 3 countries; and one subject (2.9%) lived in 6 different countries.

Over half (51.4%) of the subjects had traveled abroad extensively prior to their assignment which reportedly facilitated their overseas adjustment.
Table 3.6
Length of Time Worked Abroad

<table>
<thead>
<tr>
<th>Number of Years abroad</th>
<th>Number of Subjects</th>
<th>Percentage of Subjects</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2</td>
<td>16</td>
<td>45.7</td>
</tr>
<tr>
<td>2.1-4</td>
<td>7</td>
<td>20.0</td>
</tr>
<tr>
<td>4.1-6</td>
<td>5</td>
<td>14.3</td>
</tr>
<tr>
<td>6.1-8</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>&gt;8</td>
<td>2</td>
<td>5.9</td>
</tr>
</tbody>
</table>

M = 3.85 years
SD = 3.81
Range = 1.5-19 years
The great majority of the subjects (80.0%) had a strong desire to work abroad. Of the remaining 7, six (17.1%) were ambivalent, usually due to fears about their family's adjustment and one subject did not want to work abroad. However, he knew that it was a requirement for promotion in his company.

The majority of the subjects were assigned to Europe (62.9%), and England (34.3%) in particular. Seven subjects worked in Asia (20.0%) and 5 in South American (14.3%), and 1 in South Africa (2.9%). The specific countries to which the subjects were assigned appear in Table 3.7.

The subjects reported a variety of reasons for their assignments. The basic categories that appeared on the demographic questionnaire were taken from Tung (1988) and consist of start-up phase, management development of the expatriate, no adequate local management available, need to maintain a foreign image, and unavailability of local technical expertise. The start-up category was later expanded (and renamed) in this study to include initiation activities of various types. For example, several subjects were sent on special assignments with a specific purpose, e.g., a SWAT team that went to Japan to develop the Asian market, a "hatchet man" sent to assess the local managing director, and people dispatched to oversee new foreign licensees. All represent initiation activity because they
performed non-routine tasks and did not fit readily into local hierarchies.
<table>
<thead>
<tr>
<th>Country</th>
<th>Number of Subjects</th>
<th>% of Subjects</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>12</td>
<td>34.3</td>
</tr>
<tr>
<td>Luxemburg</td>
<td>4</td>
<td>11.4</td>
</tr>
<tr>
<td>Belgium</td>
<td>3</td>
<td>8.6</td>
</tr>
<tr>
<td>Japan</td>
<td>3</td>
<td>8.6</td>
</tr>
<tr>
<td>Holland</td>
<td>2</td>
<td>5.7</td>
</tr>
<tr>
<td>Korea</td>
<td>2</td>
<td>5.7</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>2</td>
<td>5.7</td>
</tr>
<tr>
<td>Venezuela</td>
<td>2</td>
<td>5.7</td>
</tr>
<tr>
<td>Germany</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>Mexico</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>Argentina</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>Brazil</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>South Africa</td>
<td>1</td>
<td>2.9</td>
</tr>
</tbody>
</table>
The subjects were instructed to identify all the reasons for their assignment. In most cases, multiple reasons were selected. Table 3.8 presents their responses.

The subjects worked in three types of jobs: research (14.3%), services, such as banking, accounting, and law (51.4%), and sales and manufacturing (34.3%). The jobs were categorized in this fashion because of the required degree of cultural involvement. A previous study mentioned that expatriates in manufacturing jobs assimilated host culture values to a greater degree than did those in service industries (Lee & Larwood, 1983). This was the rationale for grouping the jobs in this fashion. Research jobs were hypothesized to have the lowest degree of cultural involvement, service jobs, an intermediate amount, and sales and manufacturing the highest degree of cultural contact and involvement.
<table>
<thead>
<tr>
<th>Reasons</th>
<th>Number of Subjects</th>
<th>% of Subjects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiation Activity</td>
<td>7</td>
<td>20.0</td>
</tr>
<tr>
<td>Management Development</td>
<td>16</td>
<td>45.7</td>
</tr>
<tr>
<td>No Available Local Management</td>
<td>12</td>
<td>34.3</td>
</tr>
<tr>
<td>No Available Technical Expertise</td>
<td>19</td>
<td>54.3</td>
</tr>
<tr>
<td>Need to Maintain a Foreign Image</td>
<td>6</td>
<td>17.1</td>
</tr>
</tbody>
</table>
The returned expatriates worked in several different types of facilities overseas. Fifteen (42.9%) worked at corporate or regional headquarters; seven (20.0%) worked at country branches of service industries. Six (17.1%) worked at R&D technical centers, and seven (20.0%) at manufacturing plants or divisions. The size of the facilities where the expatriates worked abroad were categorized as small (1-20 employees), medium (21-100 employees), large (101-500 employees) and very large (>501). Five (14.3%) were small; fifteen (42.9%) were medium; seven (20.0%) were large; and eight (22.9%) were extremely large.

The subjects were asked to identify the role or combination of roles that best described their overseas function. The categorization scheme presented to them was developed by Tung (1988) and consists of: managing director, headquarters representative, functional department head, technical advisor, operative, and researcher. Once again, multiple responses were chosen by the subjects. Interestingly, the role of Headquarters representative that appears in Tung's list of categories was only chosen in conjunction with other roles. Another possible category might be that of "functional representatives", for example, the sole lawyer, sales representative, or strategic planner. These individuals
work on their own doing their particular function and have no supervisory responsibility; however they also represent the company. This category was not utilized in this study because of the small number of subjects. The subjects' responses to this question appear in Table 3.9.

Language ability is frequently mentioned in conjunction with expatriate effectiveness. Only 7 of the subjects (20.0%) speak no foreign languages; 17 (48.6%) speak one; 7 (20.0%) speak two languages; 3 (8.6%) speak three; and one subject (2.9%) reportedly speaks 6 languages. In regards to the level of fluency the subjects attained in the country where they were last assigned, 14 subjects (40.0%) reported that their fluency was low; 10 (28.6%) stated their fluency level was medium; and only 3 subjects (8.6%) reported their fluency as high.
### Table 3.9
Expatriate Roles

<table>
<thead>
<tr>
<th>Roles</th>
<th>Number of Subjects</th>
<th>% of Subjects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing Director</td>
<td>5</td>
<td>14.3</td>
</tr>
<tr>
<td>Functional Department Head</td>
<td>15</td>
<td>42.9</td>
</tr>
<tr>
<td>Technical Advisor</td>
<td>10</td>
<td>28.6</td>
</tr>
<tr>
<td>Trouble Shooter</td>
<td>14</td>
<td>40.0</td>
</tr>
<tr>
<td>Operative</td>
<td>7</td>
<td>20.0</td>
</tr>
<tr>
<td>Researcher</td>
<td>6</td>
<td>17.1</td>
</tr>
</tbody>
</table>
Learning a foreign language was not necessary for the expatriates working in English-speaking countries. Therefore they did not respond to the question that asked if they had made an effort to learn the language where they were assigned. Of the subjects in non-English speaking countries, sixteen (45.7%) replied that they had tried to learn the language; eight subjects (22.9%) had not.

All but four of the subjects (88.6%) lived in host country neighborhoods rather than in expatriate ghettos. Only three (8.6%) of the subjects socialized only with Americans. The rest spent their non-work time with a combination of host country nationals, third country nationals, and Americans. (Two of the subjects socialized with no one.) Thirty-one subjects (88.6%) still correspond with people they met abroad; only two of this group correspond only with Americans. The others write to either host country nationals or third country expatriates. This is hypothesized as a measure of acculturation (Brein & David, 1971).

Twenty-seven of the subjects (77.1%) were ready to return home at the end of their assignment. Six (17.1%) were not and two (5.7%) subjects did not mention whether they were or not.

Twelve subjects (34.3%) found repatriation easy, 21 (60.0%) found it difficult. Three subjects said it was
even harder than going abroad in the first place (8.6%). Twenty one subjects (60.0%) would like to go abroad again. Two (5.7%) would not. The remaining group of 12 subjects (34.3%) stated that a decision to go abroad again would be contingent upon their family, career and the location of the assignment.

Procedure

The subjects were contacted by telephone. The researcher (1) explained that the purpose of the study was to gain a better understanding of the expatriate experience, (2) described the selection criteria, (3) indicated the time and effort required of them, and (4) asked if they would be willing to participate. If they met the selection criteria and agreed to participate, they were mailed a cover letter (Appendix A), the demographic questionnaire (Appendix B), and the competency instruments (Appendix C through E), and asked to complete them in the following order.

1. Demographic questionnaire
2. Sentence Completion test (SCT) (Appendix C)
3. Personal Reaction Inventory (Appendix D)
4. Purdue-Rutgers Prior Experience Inventory, III.
   GIAL-SD (Appendix E)
In most cases, the interview was scheduled at the subjects' office a week after they had received the instruments. The interviews began by determining where the expatriate had been stationed and who had accompanied him or her abroad. Next the researcher made a reference to the "acting" questions on the Personal Reaction Inventory and asked if the subject remembered role playing while abroad. Then the subjects were asked to talk about their time overseas and allowed to speak until they chose to stop. At this point, the interview protocol (Appendix F) was called into play and used to guide the remainder of the interview. The protocol consists of 7 major sections.

I. Open-ended questions about the general experience, e.g., what were the first few days like, what was the most important thing you learned during the first six months, and how did people see you?

II. A request for the subjects to divide their experience into a set of stages or chapters as if they were writing a book.

III. A section on paradoxes and contradictions - first asking them if they could remember any and then showing them the 9 explicited paradoxes which they were asked to mark for presence/absence and subsequently rank.

IV. A request for a critical incident about a paradox experience.
V. Acculturation questions regarding their work and living situation and social life
VI. Administration of the acculturation and effectiveness instruments.
VII. Questions regarding how and if the expatriate had changed abroad, the coming home experience, and selection criteria and advice for expatriates and Human Resource personnel.

The interviews lasted between 1 1/2 hours - 3 hours. All but two subjects gave permission for the interviews to be tape-recorded. Brief notes were also taken during the interviews due to the researcher's mistrust of the mechanical world, subsequently justified. The tapes were typed and duplicated to allow for manual coding of interview themes.

The data were collected between May-October, 1988.

Pre-Study

I organized a focus group of returned expatriates at a local company to guide the protocol development. The memo written to the participants is included as Appendix G. Two former expatriates took the instruments and were interviewed by the researcher in order to gauge both the time necessary to fill out the instruments and the
effectiveness of the questions. The protocol was modified as a result.

Instrumentation

The variables studied in this investigation can be divided into four main categories: cultural involvement, awareness of paradox, competencies, and the outcome variables of acculturation and effectiveness. Figure 3.1 presents all the variables and subscales used in the quantitative analysis and is included to orient the reader.

The cultural involvement variables, discussed further below, were assessed by items on the demographic questionnaire or the interview protocol. The awareness of paradox instrument was developed by the investigator. In regards to the competency measures, identity integration was measured by the Sentence Completion Test (Loewinger & Wessler, 1970), tolerance of incongruity was measured by the GIAL (Driver & Streufert, 1966), and social acuity was measured by the self-monitoring scale (Snyder, 1974, 1980). Acculturation was measured by an adjustment scale (Black, 1988), and effectiveness was measured by an effectiveness and performance scale adapted from Porter & Lawler (1968).
### CULTURAL INVOLVEMENT

#### Work Related Factors
- **Type of Facility:**
  - Corporate/Regional HQ
  - Country Service Branch
  - R&D Technical Center
  - Mfg. Plant/Division
- **Size of Facility**
- **Organizational Phase**
- **Reason for Assignment:**
  - Initiation Activity
  - Management Development
  - No Available Local Mgmt.
  - No Available Technical Expertise
- **Job Type:**
  - Research
  - Service
  - Sales/Manufacturing
- **Job Function:**
  - Managing Director
  - Functional Head
  - Technical Advisor
  - Troubleshooter
  - Operative
  - Researcher
- **Customer Contact**
- **No. of Direct HC Reports**
- **No. of HC Co-Workers**
- **No. of Third Country Co-Workers**

#### Cultural Factors
- Cultural Similarity
- Cultural Mentor

#### Awareness of Paradox
- Individual Paradoxes
- Total Number of Paradoxes
- Paradox Factors:
  - Freedom/Constraint
  - Value Dimension
  - Trust/Mistrust
  - Social Acuity

#### Acculturation
- Total Adjustment
- General Adjustment
- Interpersonal Adjust.
- Work Adjustment

#### Effectiveness
- Ego Development
- GIAL
- Self-Monitoring
- Self-Control
- Stage Presence
- Other Directed

#### Personal Factors
- Marital Status
- Occupation:
  - General Manager
  - Engineer/Chemist
  - Auditor
  - Banker
  - Lawyer
  - Accountant
- Age at Posting
- No. of Children
- Previous Overseas Experience
- No. of Countries Lived In
- Tenure
- Previous International Travel
- Desire to Go Abroad
- Length of Time Abroad
- No. of Foreign Languages
- Language Effort
- Language Fluency
Cultural Involvement Variables. These variables determine "the extent to which the expatriate 'enters' the other culture or is in an interdependent relationship at work." The study assumes that the awareness of paradox is positively related to cultural involvement and attempts to ascertain if this assumption will prove correct. The rationale for including the individual variables is experientially based, rather than supported in the literature on expatriates. There are three categories of cultural involvement variables: work related factors, cultural factors, and personal factors. Some of these are continuous variables, others are nominal in nature. Because of small cell size, most of the nominal variables were recoded into presence/absence variables.

The work related factors are comprised of both continuous and presence/absence variables. The continuous variables are size of facility (ranging from small=1 to very large=4), organizational phase (established=1 and start-up=2), number of host country direct reports (0=0, 1-5=1, 6-11=2, and >11=4), customer contact (no=0, yes=1), and number of host country and third country co-workers. Type of facility (corporate/regional headquarters, country service branch, R&D lab, and manufacturing plant/division), job type (research, service, sales/manufacturing), job function (managing director, functional head, technical
advisor, trouble shooter, operative, and researcher) and reason for assignment (initiation activity, management development, no available local management expertise, no available technical expertise, need to maintain a foreign image) were recoded as presence/absence variables where no=0 and yes=1. These categories are presented in Figure 3.1.

The cultural factors consist of two variables - cultural similarity and the presence of a cultural mentor who can explain the host culture to the expatriate. The operationalization of cultural similarity is based roughly upon Torbiorn's (1982) cultural groupings and his findings that people adjust most easily to cultures that are most similar to their own. The criteria Torbiorn used for categorization were language, religion, and level of economic development. Since both Americans and Swedes come from primarily Germanic-based, Christian (Protestant), industrialized nations, it is likely that these groupings will be appropriate for Americans as well. However, I have modified Torbiorn's scheme slightly to place only English speaking countries in the first category. England and South Africa were categorized as the most similar primarily due to the language. The next group is composed of the European countries; the third group consists of Latin America and the fourth group are the Asian countries.
The second cultural factor is the presence or absence of a cultural mentor. The subjects were asked, "Did you have someone to explain the local culture to you?". Their responses were scored as yes=1 and no=2.

The personal factors are primarily demographic variables and others related to previous international experience. Marital status is a nominal variable that refers to 4 categories of subjects: single (1), married (2), divorced/separated (3), and widowed (4). The continuous variables are age at assignment (20-29=1, 30-39=2, 40-49=3, 50-59=4), number of children, number of previous overseas experience, number of countries lived in, length of time with the company before the assignment, previous extensive international travel (yes=1, no=0), desire to go abroad (yes=1, ambivalent=2, no=3), and length of time abroad (1-2 years=1, 2.1-4 years=2, 4.1-6 years=3, 6.1-8 years=4 and >8 years=5). The final variables related to language skills - the number of foreign languages spoken, and degree of fluency (low=1, medium=2, and high=3), and the effort made to learn the language in the last non-english speaking country of assignment (not applicable=1, yes=2, and no=3). To ascertain language effort, subjects were asked, "Did you always learn the language spoken in the countries where you lived? Why or why not?". The occupation categories (general managers,
engineers/chemists, auditors, bankers, lawyers, and accountants) were recoded as presence/absence variables where no=0 and yes=1.

Awareness of Paradox. The subjects were first asked if they could remember any instances of paradoxes or contradictions when they lived abroad. Next they were shown the list of paradoxes explicated by the researcher and located in Figure 3.2 and Appendix H. They were asked to mark "yes" or "no" by those they had experienced. They were subsequently requested to rank the paradoxes they had experienced in terms of their significance to the subject with "1" being the most significant.
5. Have you ever experienced the following? Please write YES or NO in the first blank. When that's completed rank order the paradoxes/contradictions according to the significance or importance they held for you. Assign a "1" to the paradox which was the most significant.

YES/NO RANK

1. Possessing a great deal of power as a result of your role but downplaying it in order to gain necessary input and cooperation.

2. Generally thinking well of the host country nationals while at the same time being very savvy about being taken advantage of by them.

3. Feeling caught between contradictory demands of the headquarters on the one hand and the demands of the host country nationals and the local situation on the other.

4. Seeing as valid the general stereotype about the culture you lived in but also realizing that many host country nationals do not fit that stereotype.

5. Giving up some of your American values in order to be accepted or successful in the other culture while at the same time finding some of your core American values becoming even stronger as a result of exposure to another culture.

6. As a result of being abroad a long time, feeling at ease anywhere but belonging nowhere.

7. Becoming more and more "world-minded" as a result of exposure to different values and conflicting loyalties but becoming more idiosyncratic as to how you put together your own value system and view on life.

8. Trying to represent your company as best as you can in order to succeed but also realizing that the "ideal" values you act out abroad may not exist back at Headquarters.

9. Being freed from many of your own cultural rules and even from some of the host culture's norms but not being free at all from certain host country customs which you must observe in order to be effective.

10. Others you identified:
The Sentence Completion Test of Ego Development. The SCT was chosen to operationalize the construct of identity integration. It was developed by Loevinger and her colleagues (Loevinger, 1966; Loevinger, 1976; Loevinger & Wessler, 1970a, 1970b) as a test of ego development. It was designed initially in 1970 for females (age 10 to <50) and later adapted for men and revised in 1985 (Loevinger, 1985). The revised version was used in this investigation. Separate forms, differing only in the use of pronouns, exist for men and women. The SCT is a projective measure comprised of 36 sentence stems ("My mother and I", "When people are helpless", and "Men are lucky because"). Each sentence stem has its own code book comprised of answers that have been found in people with a particular stage of ego development. Raters assign each response to its appropriate ego level and then use an ogive rule scoring system to arrive at the subject's developmental stage category. Loevinger and her colleagues are involved in ongoing validity and reliability studies. Completed studies indicate that this test is a valid and reliable measure of the construct of ego development (Hauser, 1976 & Loevinger, 1979).

There are no norms for this instrument; however, the modal level for adults in American society is the I-3/4
level, the Self-aware level that represents the transition from the Conformist to the Conscientious stage.

The researcher attended a training session on scoring the SCT and achieved an acceptable level of inter-rater reliability for a scorer. These instruments were scored by the researcher and another qualified rater. Inter-rater reliability of .90 was attained on the sample of 29% of the tests scored by the other rater.

The Self-Monitoring Scale. The Self-Monitoring Scale was developed by Mark Snyder (1974) to assess individual differences in the way people monitor their social environment and stage-manage their behavior. The test consists of 25 true-or-false items that measure the extent to which people monitor their self-presentation, expressive behavior, and nonverbal affective display. The scale is based upon Goffman's metaphor that daily life consists of theatrical performances. Sample items are "I find it hard to imitate the behavior of other people", "I sometimes appear to others to be experiencing deeper emotions than I actually am", and "In different situations and with different people, I often act like very different persons". Factor analysis indicates that the test has three subscales: other directed behavior, self control, and stage presence.
Snyder tested the scale with four different populations and found it to be a reliable, valid measure (1974, 1979, 1987). Validation studies utilized peer ratings and criterion groups. The scale is internally consistent with a Kuder-Richardson 20 reliability of .66 (Gangestad & Snyder, 1985). Snyder modified the scale slightly in response to criticism surrounding the scale's construct validity (Snyder, 1987; Briggs, Cheek, & Buss, 1980). Snyder has found that the mean scores for college students are approximately 12.50.

The General Incongruity Adaptation Level (GIAL). The GIAL was employed to measure incongruity tolerance. This test was developed by Driver and Streufert (1966) to measure individual's adaptation level for general incongruity, in other words, their cognitive level of comfort with incongruity. Incongruity is defined as any situation in which expectations and reality do not match. The test consists of 100 items. Each item describes varying responses to a particular situation and asks the respondent to indicate how much the statement describes their own behavior on a 5 point Likert scale (1="not true at all" through 5="very frequently true").

Factor analysis of the items indicated that with few exceptions, all items loaded on one general factor.
Therefore, internal consistency is quite high. Test-retest reliability for the test is also high although too much time cannot elapse between test administrations because the GIAL is predicted to increase if the respondents are subjected to new experiences. Construct and predictive validity has been well documented (Driver et al., 1969; Moberg, 1968; Hunsaker, 1971, 1975; Leed, 1974, Driver, 1984). The mean currently used by Driver and his associates is 49.5 (SD=6.5).

The respondents filled out a General Purpose Answer sheets which were then sent to Driver's Decision Dynamics Corporation and scored by computer program.

*Adjustment Scale.* Black's (1988) adjustment scale, an expanded version of the scale developed by Torbiorn (1982), is used to operationalize acculturation (see Appendix I). Three subscales were factor analyzed and represent different facets of adjustment: (1) work roles (5 items); (2) interaction with host country nationals (4 items); and (3) general culture and everyday life (9 items).

*Effectiveness.* Effectiveness is measured by two scales consisting of the same items and a 5 point Likert scale (see Appendix J). It was originally developed by Porter and Lawler (1968). The first scale asks for the
subject's self reported measure of his or her effectiveness; the second scale measures the performance appraisal rating in percentage form that the subject reported receiving abroad.
CHAPTER IV

QUALITATIVE DESCRIPTION AND INTERPRETATION

"While you and I have lips and voices which are for kissing and to sing with
Who cares if some one-eyed son of a bitch invents an instrument to measure Spring with?"

e.e. cummings

Overview

This chapter will provide information regarding the qualitative results of the study and an analysis of the data. The data will be examined with regard to the two research questions: (1) Do expatriate stories reflect the transformational nature of the hero's adventure metaphor? and (2) do expatriate business people experience paradoxes, and, if so, what are they?

The Experience of the Interviews

The overall feeling I received from doing these interviews is that the expatriates had a great need to talk about their experiences. Many commented that no one else was willing to listen to their stories and thoughts about living abroad. It was possible to watch some of the
subjects making sense of their experience as they talked. This appears to confirm Harrison and Hopkin's (1967) observation that Peace Corps volunteers returned with war stories or anecdotes but not with conceptual maps that organized these stories. I received the impression of experiential data lying fallow, waiting to be processed into abstract concepts. The longer-term expatriates seemed to have processed and made more sense of their experiences. A focus group of returned expatriates that helped guide this study suggested that companies do de-briefing sessions with returned expatriates so they would have someone with whom to share their experiences and put them into perspective. Certainly the study subjects were very willing to take time to talk about their experiences. They agreed to heavy demands upon their time - 1 hour of answering questionnaires and instruments and at least 1 1/2 hours of interview time. There was limited organizational pressure to participate in this study since the researcher's contacts were with individuals, not organizations. All the subjects could have pleaded international travel and a heavy work load had they felt the need of a good excuse for not participating. Of the subjects contacted, only 3 refused to participate. With only one exception, the others seemed to be participating because they were interested in the topic and grateful to
be allowed the opportunity to speak about their experiences. They also had questions about whether theirs was a "normal" experience - what were they like compared to other expatriates? This seems to tie in with the social comparison with other American expatriates that occurs during the overseas experience, whether or not the expatriate is in close physical proximity or contact with other Americans. Some of the interviews lasted up to three hours; in one case, the subject followed me to my car, begging me to go to lunch or return so we could continue talking. Clearly these people needed to discuss their experiences, which facilitated the research and transformed it from "just a study" into a very pleasurable and apparently meaningful experience.

For many of the interviewees, the excitement and affect with which they related their feelings, thoughts, and adventures made it evident that their overseas assignment was one of the most profound challenges and events of their lives.

A final observation about the interviews concerns the number of times the subjects mentioned the words "learn", "adventure", and "challenge". These were the most repeated words in the transcripts.
The Hero's Adventure

One of the words that did not appear in the transcripts was "hero". Expatriates do not refer to themselves as "heroes", yet their conversation is full of "hero talk". Their heroic statements can be categorized into the following taxonomy: (1) difficult work assignments and (2) the accomplishment of work goals under less than favorable conditions, (3) autonomy, (4) having to make it "on their own" or "going it alone", (5) feeling "special" because of their position or their particular efforts/abilities, (6) pride in their ability to acculturate and adapt to changes, (7) succeeding in comparison with other expatriates whom they perceived as less successful in some fashion, (8) a sense of mastery and self-confidence upon "running the course", and finally, (9) reports of positive personal transformations as a result of the experience. In many ways, an expatriate assignment is like an Outward Bound program where one builds confidence by mastering difficult obstacles and new skills. The following quote was made by one of the older expatriates in describing his first few days in Hong Kong. It contains "hero talk" of many types.

"They were probably some of the most thought provoking times in my life. Because it was assuming new roles, new responsibilities from a professional point of view. It was exciting, it was good, it was setting up, having the opportunity to influence an operation
from an overall business point of view and learning as I saw it, as a chance to get involved in the financial side of the business and to be responsible for new areas. Although I had had the responsibility and a lot of experience from the sales and marketing point of view in working in the Orient. But having the oriental people working for me, and living in their culture and being able to adjust and take a new perspective on things was quite exciting from that standpoint. And I felt very confident about my background. I think I probably sound a little bit egotistical maybe, but I probably felt more confident about my abilities and knowledge of the Far East, that I thought I was very much right in my ballpark. Right where I should have been at that point, from the professional point...I did a lot of development work in China, opening up some new avenues for business and that was a nice challenge to be able to be there next door and be able to carry out some of the programs I had worked on in the previous four years. So it was very rewarding.

The succeeding paragraphs provide more examples of "hero talk". Many of these passages contain more than one of the categories identified previously. When reading these quotes, it is important to bear in mind Campbell's caveat, "The hero gets the adventure he or she is ready for." It is very evident from the interviews that there are different forms of expatriate experiences and different forms of "heroism"; yet they share in common a heroic flavor.

1. **Difficult Assignments**

One of the ways in which the adventures are different derives from the reasons for the overseas assignment. While some assignments are to develop international managers, others had a specific purpose, such as assessing
the local management, or developing a new market in Asia. These jobs were more unstructured and required more adjustments than did jobs that were very similar to those performed in the United States (e.g., auditing jobs with large accounting firms). The "special" jobs were sometimes extremely difficult, almost no-win assignments like the one described below:

"I was put in a no-win situation. Many Americans who go overseas are doing it on the basis of a long term career. ... My position was a little different in that I was forced into an organization in which there was no function. And I had to assume and take over responsibility from other people who were still there. So I superceded them in a company where hierarchy is extremely important. So they were downgraded when I came in and they lost face, which was extremely detrimental to a European, because image is everything; it is not what you do but what people think you are or what they think you do. ... I wasn't just put in there to do a specific job ... I almost had to create a job and ... attempt to change the culture of a company and that was difficult. And in a short term, predetermined time."

The terms used give some indication of how challenging the situation was. For example, "no-win situation", "I was forced into an organization", "take over responsibility from other people who were still there", and "they were downgraded when I came in and they lost face" all are aggressive terms. Thus, not only was the individual in question in a strange land and a new organizational culture, but he was forced to act like the general of an occupying army but amongst a people and country that had
not been vanquished and where pride was still intact. This creates a work/task and acculturation dichotomy. Rather than feeling welcome at work, the aggressive role assigned to this expatriate also marginalized him socially from his colleagues.

"But the frustrating part was that you were really never part of the organization. ...Being the second man in the organization and not being able to confide or discuss with the managing director, you are in a very difficult position to discuss things on a personal basis."

Other subjects also mentioned the difficulty of their assignments, either due to the external environment or internal conditions.

"It is a tough field, and it was particularly tough during the five years that I was over there. We were steel related, and the steel industry has not been in great shape until the last eighteen months or so. So that was a bit of concern. But again, it adds to the challenge."

"They had left lots of things since October. '(subject) will do it when she comes.' There was quite a backlog. You want to get established in the beginning and make a good impression but there's this incredible backlog to take care of."

"Probably the managing director role fits my job more. Because it was a small business, we don't have a large organization in Europe. And my responsibility included everything except sales....And in 1983, because of the high dollar, we added the business in the Far East and South America because the U.S. was losing out because we were competing with German companies, who were our main competitors. It was hard to compete because of the strong dollar. ... when I left, let's see, this summer, the business this year will be around $35 million dollars and it was only $10 million when I took over. At that time it was a turn-
around situation. We had two years to turn it around or sell it.... It had been marginally profitable for a number of years. It ran into some real problems in 1980 and the management here in our HQ office weren't sure what was going on. And I had been over there before in 1971-1974 as an engineer when the plant was being built and started up. So I knew a lot of the people; I knew the technology. I knew the markets that we sold into here in the States and had a fair idea of what was going on in Europe."

The hero often encounters not only a different national culture but also another management style and organizational culture.

"The headquarters has always operated its subsidiaries as independent companies. The managing director in a company is a king. ... The ... subsidiary was managed by a very, very competent manager ... prior to the current manager, who I worked for. He ran a one-man show. ... he did it in a way that he never developed any staff. He was a workaholic. Had a fantastic memory and could do many things and the one thing he could do was make decisions. When he retired, his successor who was his assistant, attempted to emulate his management style ... [and] was, for all practical purposes, a failure. ... he couldn't make a decision. And quickly everything in the company came to a halt. And that is the kind of culture that I came into ... And it was extremely frustrating and difficult coming from an American style of ...a more participatory style of management. ... So trying to work through that in terms of the business aspects was extremely frustrating. Very, very difficult. I forced people to make decisions. It was not the easiest assignment in the world. I was in a situation where I was forced on the managing director. It required building up relationships with the people on an individual basis - of assuring them that there would be no retribution or problems long term. That I was taking the responsibility. ... It didn't work well but it worked."

The loneliness of the intruding change agent imposed by headquarters, the unfamiliarity with the language, being frustrated by a difficult no-win situation and the
stubbornness of organizational culture would be enough to make the most self-assured corporate warrior blanche. But, being heroic doesn't just mean being a warrior; it can mean very different things to the individual heroes.

2. Work Accomplishments

Other expatriates talked about the impact they had while working abroad and their accomplishments. There are indications that some expatriates feel they can make more of a difference working abroad than they can in the United States. The ability to see a closer connection between one's actions and outcomes is a major benefit of the experience. This is made possible by the increased power the expatriates find in overseas roles.

"This is important. This is the big time. Underline this part. All of a sudden there was that feeling of power [that] what I say may affect people's careers and in fact did. There were some people who wound up losing jobs and certainly fell in the esteem level after some of our visits. We had one particularly nasty situation in Germany where there was a huge shrinking inventory....And we were especially asked to go and review that. And that's when our president and the chairman of the board were asking for weekly updates and that was a frightening time from the standpoint of the power we were actually wielding right then. Because they were almost hanging on every word and in a way that was frightening and in another way it was a real rush and 'wow! People are listening and what we are saying and we can make a difference here.' That happened quite a few times."

The previous quote is a good example of the power that results from handling an area of uncertainty for an
organization. In addition to feeling they were capable of making a difference, there was a great deal of pride in the expatriates' specific work accomplishments.

"And I guess that was the first point where I felt that I was responsible for running the entire operation. It was a level of power ... that I had not had previously. ... to be successful, I had to get the people who were reporting to me on board with me. So it was a very interesting time. It was ... compounded by having a language problem—getting to them in their own language. .... we had ... turned over the operation to our local partner and it went steadily downhill. And so I was called in to run the plant after a period of about eight years where there had been no American input into it. So I was concerned about the reluctance of the local partner to call in help. The operation was in very poor condition. So it was a challenge from the start to get it back up to the level that we felt we should be able to. And we were able to accomplish that.... And the relationship was a little cool at first with the local partner, but he was above all a businessman ... the results were coming ... that he wanted to see."

"As far as the job went, I was very pleased in the first six months. As I mentioned, there is a brand-new operations and generally those take several months to a year to start turning a profit. And we actually made a profit in the third month! And it just went onwards from there. The operations got off to a very good start and was maintained for a very profitable business there. ... During the period of time I was there, we expanded the operation five different times."

"Well, I learned two key things, I suppose. One, that the higher level of responsibility assigned to me, I could handle. So I feel good about this. And in fact, that office still reports to me. ... So from my personal goals and objectives that were achieved and the way that the business started to grow was very satisfying. So I know I can handle that, those kinds of step-ups. Higher levels of responsibility are very rewarding."
3. Autonomy

The autonomy and ability to make quick decisions abroad is highlighted in this recently returned subject's comparisons about the overseas and domestic work setting. He talks like an entrepreneur, another group that "enacts" heroism.

"Just getting back into the bureaucracy is difficult. Now, getting back in the mode of gaining consensus decisions where you did not do a lot of that overseas. You made them on the longer term objectives and strategies...But day-to-day, you made your own decisions. You know, marketing people made their decisions and the R&D guy and the plant manager ran the plant. I just walked around and asked 'How is it going? What do you need?'. Here you have to talk to this guy and that guy and get their okay and talk to his boss and his boss. And all of these bosses are talking and the guys are talking. It is just a total anarchy of the American corporation. ....I noticed as soon as I came on this job that the work pace is a hell of a lot slower here. Because it is working through a lot of other people. Some of the things I want to do here are starting to move. But come on, it has been 10 weeks! In Europe if something wasn't happening on Friday, I was raising hell. Here I got to be careful on how to raise hell. ....I have got to fit into all the agendas of everyone else...But it is amazing, you know, the people here don't really have a perspective of where they are really going. That was one thing nice about running a small business (the European business). You set that longer term goal, keep moving towards it, and if you have a good, well-thought out goal you are going to be really successful. You try to explain that here and people, you know, it is like a moving target."

In many respects, certain expatriate assignments allow people to be the intrapreneurs Pinchot (1985) describes. They have the autonomy that comes from working thousands of miles away from their supervisors and the ability to make
decisions that have real impact. At the same time, they have the security of working for a large corporation that "protects" them, provides their American benefits, and does not automatically fire them if the business loses money. In a sense, the expatriate experience of these subjects is adventure but with a very strong umbilical cord stretching back to corporate headquarters.

"[I'd go abroad again] if the challenge were there. I like the entrepreneurship of working overseas. Being your own boss within guidelines."

4. Going It Alone

The element of working or traveling alone was important to several expatriates and seemed "heroic" in the way they describe it. Depending upon the person, leaving one's culture and facing the unknown is clearly an adventure and often an act of courage. One aspect that is overlooked for expatriate business people is that very few companies guarantee their employees that such an assignment will result in a promotion or career advantage when they return. For some, just accepting the assignment and working on their own, outside the corporate network is a courageous act, or, at minimum, one that is driven by a greater interest in adventure than career concerns at that particular point. For some of these subjects, the expatriate experience represents the first time they ever worked alone. It is not a common experience in large
corporations. While it can be difficult, it is also an opportunity to prove oneself, much like Indian rites of passage that require adolescent boys to spend time alone in the wilderness.

"[the first six months] were very challenging. I had some overlap with my predecessor. He stayed for about three months while I was there. And I felt rather comfortable during that period because he was there for almost 5 years and knew the place very well, and, in fact, he is English and went to the university in London. During the end of his time, naturally I had some feelings of hesitation, trepidations, whatever, about tackling the job on my own. But that quickly passed. You get into it the first couple of days after you are thrust into a situation like that. And I immediately began enjoying it and feeling more a part of our business and the company than I ever had before. That was exciting. Well, I think when you are completely on your own and you don't have anybody to rely on for things, I think you have to broaden and do something, see it through from start to finish. Realize that you have done it on your own. And that you are representing your company in doing it. So you are, in fact, looked on as representing your company's position and their policy on individual matters here and there. And you begin to do that all the time. So I think that's something that tells you that you really are an important cog in the wheel."

"[WHAT CHARACTERISTICS WOULD YOU LOOK FOR IN SELECTING EXPATRIATES?] I think they would have to be loyal to the company. They would have to be very stable, that is, sure of themselves and sure of their direction within the company. I say loyal because I was in a situation where the company put me out there kind of all by myself. I had opportunities to talk to a lot of people from other companies. And the grass looks greener, you know. Other people were driving around in Mercedes that the company would give them. Being by yourself also means you have to be a self-starter. You can get a lot of things started, but if someone doesn't see it all the way through, I think that applies anywhere really. [BUT IT'S MORE OBVIOUS WHEN YOU'RE WORKING ALL ALONE.] Yes."
"I spent all my free time traveling around by myself. That's really where I improved my Spanish was that first year traveling with no one to talk to or no one to help me get around. And all the attendant problems with traveling really made it work. [The travel] always turned into an adventure.... But the first trip, I was gone for four and a half weeks and the first two and a half I wasn't anywhere that I was supposed to have been. I was on the other side of the continent. So that's a bit of an adventure. ...it turned into an adventure. And then the next time I was expecting an adventure, I was a little more prepared."

5. Feeling Special

Many of the expatriates talked about being special or experiencing a special time of life, having a special job. It was clear that many of them saw themselves as standing apart from others in some respect. When asked to sum up their first 6 months in Japan, one subject replied as follows.

"Well, I'd probably say 'died and gone to heaven.' Keep in mind my wife and I were 25 when we arrived. We were married for a month. We were still paying off graduate school loans so we were living like graduate students in Chicago before going over there. And I was in a job where I was supposed to learn, not produce. So that, and I was aware of it at the time, was a very unique opportunity. But at the same time, we were being paid expatriate wages which means that we were living in a very affluent lifestyle from the point of view of the average Japanese. ...That may have been the happiest time of our lives, just a wonderful, magic time....It was devastating to come home.... There was the big fish, little fish syndrome. I can remember that when we came back to Chicago... And we were walking through [a shopping mall] and a group of Japanese tourists passed us by, shouting in a very animated fashion, because they were so delighted with what they were seeing around them.
It was just a positive group. A delightful discussion, which we of course understood completely. And of course when we heard that, we turned around right away. And this group of Japanese tourists just kind of passed us right by and didn't even notice us because we were just like any other Americans. And that kind of symbolized the passing of that 6 year period to us. And we both, right at that point, we both just broke down and cried. We had to go and sit down. This is within 2 or 3 days of having come back to the United States. And it was at that point that we realized that it was over and we had to face a totally new life in the United States. We were both very well prepared, very positive about the life we were about to start in the United States but we realized how much we were going to miss Japan. And that was a very emotional experience for us. And I think that experience kind of encapsulates more than anything, you know, what the total experience of returning to the United States was like."

Other subjects described feeling special or giving up a "special life" when they returned to the United States.

"We left a comfortable life (in Holland), a special life. We are back in the States now where we are part of a big pond, not a big fish in a little pond."

"We would like to, or I think I'd like to enjoy the chance somewhere down the road to live abroad again because it is an exciting experience and you feel special in a way, living abroad. And of course you just get a chance to do things that you cannot do in the States. [WHERE DOES THAT FEELING SPECIAL COME FROM?] Oh, I don't know. I think you feel, when you talk to people that they will recognize you as not from that country and therefore you are by definition, special if not unique. And you feel like you can represent a lot more than just yourself when you are there and it is interesting to do that and challenging to do that. And it is nice to be challenged, I think, even in your own individual way. Not just the business. So I guess that's one way to feel special."

"I think also that the people view you with, they are very curious about you being from America. They are very interested in Americans so they are very curious about you, your culture. They are very curious
about what you think of South Africa, about your political views. Whenever anything happens in America, they are very curious to come to you and say, 'Geez, what do you think about what Reagan just did?'

"[WHY DID YOU WANT TO STAY IN ENGLAND?] It was a place where what I could do was valued, more so than here. It was a whole different slice of life there. They always say the upper crust does not go into business in England - they go into academics or government service. You don't get the Harvard grads there. But in London, they are more liberal arts and more intellectually oriented. Here you have people with engineering backgrounds and MBA's and they think they are hot shit. There the whole intellectual climate is different. I know the elitist stuff has its own foibles too. But there they like people who can think. You can't do that here. Here it's technologically driven."

6. **Pride in Acculturation**

Many of the subjects expressed a real sense of pride in their ability to survive and take advantage of the expatriate experience.

"Then the second [key thing I learned abroad] is...that I can adapt to changing environments. And even on the personal level, and even as tough as it may be sometimes, the fortitude, the wherewithal inside came through maybe stronger than I thought I could handle." [THAT'S A WONDERFUL LESSON THAT STAYS WITH YOU FOR LIFE.] "Well, I hope so, I am sure it is.... Hopefully, it doesn't have to be used in that context again...but it's nice to know in a way that you've got something inside that may carry you through should it happen."

In a phenomenological sense, each hero determines how "heroic" the experience is and for many, sheer survival qualifies.
"Filled with ups and downs; emotional highs from seeing the beauty of the country and the newness, it being a new experience. To emotional lows when you are dealing with some person on the phone that is speaking a mile a minute and you don't understand a word that they are saying. Total frustration. And you think, 'Are you going to survive this?' It's just those kinds of things. ... from peak to valley. It just seemed like there were so many."

The stress is evident in the preceding: "so many" emotional highs and lows, total frustration, and questions of survival. To weather the storm of such changes and to emotionally "land" one day and think, "I've made it; I did it," feels heroic. The same expatriate who complained of the stressful ups and downs describes getting beyond the frustration in the following quote.

"The work eventually settled down. I got used to dealing with the facility and the German. I thought my German was getting a little bit better and I felt more comfortable with it. My wife was used to getting around, not without problems at times, but we learned to deal with the electricians and the phone company and things like that. ...I think it was an experience...we are glad we went through it."

The language ability mentioned in the preceding quote is one of the major criteria of acculturation and a major cause for pride among expatriates. Not speaking the language is a significant frustration and has the even greater side effect of marginalizing the expatriate. One expatriate described the acclaim he received for speaking in the local language in the following quote.
"One thing I used to do ... was always speak the language of the country I was in as well as I knew it. And when the people would find out that you were an American, it was always nice to see the surprise on their face ... because they don't expect Americans to do much of that."

Not speaking the language is clearly a barrier for expatriates; they describe difficult work situations as being exacerbated by their inability to understand and communicate perfectly. Lack of language proficiency can be a humbling experience when dealing with foreigners who equate eloquence in their language with intelligence. Surviving this attribution and eventually mastering another language further contributes to a feeling of heroism. It usually takes at least six months to a year to feel comfortable in another language. In the case of non-Indo-European languages, the challenge is even greater. Learning an exotic or difficult language can differentiate the speaker from other expatriates.

"We were very young. I think we were eager. ... We made three promises when we went to Japan. The first was that we were both going to study the language intensively in Japan. And it is amazing ... that the majority of American expatriates ... did not study the language. ...We became so fluent that the Japanese did not know we were foreigners on the telephone."

7. **Succeeding where other Americans did not**

The reference to other Americans who did not learn the language or who did not make much of an effort to adapt or
become acculturated is a common theme in the interviews. Capote's quote that, "It is not enough for one to succeed; one must also see one's friends fail" is too extreme for these expatriates. However, there is no doubt that they compare themselves frequently to other Americans and, as a result, perceive themselves as superior, "heroic." Expatriates are constantly exposed, either through physical proximity or anecdotes, to compatriots who are either miserably unadapted or who must actually return before their tour of duty is completed. These are the "failures" who comprise 30% of all expatriates (Tung, 1987). It is virtually impossible for an expatriate to have no knowledge about other Americans who have failed to succeed or cope with the expatriate experience. In comparison, they see themselves as survivors, people who have what it takes to adapt.

It is clear from their comparisons that they attribute their own ability to master the situation to a variety of factors, ranging from attitude and internal traits to different strategies for acculturation, all of which are discussed in the following paragraphs.

**Attitude.** The importance of a positive attitude and a real desire to adapt is illustrated in the following quotes.

"I think that I probably adapted easier to it [living in Venezuela] than a number of individuals I heard about.... I think the experiences [we
encountered] were all the same. How they were handled was different, or not handled...The people who handled them well enjoyed it and made something of it. And the people who didn't, complained and are still complaining. The large number of people that I became closely interactive with were long term overseas people...from the US or elsewhere. So those people don't tend to have problems with moving from one site to another. The other people I am talking about were like I was, who were just shipped in for a couple of years and never got past #9 [the ninth paradox, free/not free of cultural norms] or #1 [the first paradox, powerful/powerless]. Those were the two that they could not overcome. [WHAT'S YOUR THEORY ABOUT WHY THE ONE GROUP HANDLED DIFFICULTIES WELL AND THE OTHER DIDN'T?] Some part of it is probably maturity. The other part is just an openness to new situations and a willingness to try things. Even to see if they work. So open-mindedness, I guess."

"You can make it [living in England] exciting for yourself. We had another American couple that lived just a little ways from us that...just didn't like it. They could not wait to leave. ...Didn't like the people, didn't like the area...They were miserable the entire time. [The wife and kids] spent most of their time back in the States because they just didn't want to have any part of it."

"I would guess that on the whole, of the expatriates that we saw, ... my own feeling is ... they may not have had as pleasant a time as we did. I think they made ... problems of their own making .... they didn't seem to look at it as an opportunity ... the major complaint was 'we can't get this and we can't get that,' rather than taking advantage of things they could get, even if they were different. ... There were those people that just made themselves ... unhappy."

"You've got to enjoy adventure...You know, I've known guys that have taken international assignments of have taken world trips and have packed their own peanut butter because they were afraid of what the menu might be in the local restaurant. You can't do that!"
"[To work abroad] you should be a very positive person. I wouldn't want somebody that I know to be a grumbler. There are some...grumblers that are excellent in their jobs. But I wouldn't put them overseas."

**Internal Traits.** The respondents were asked what qualities they would look for in selecting people to work abroad. This question provided an indirect approach to perceptions of their own traits. The most common answers were flexibility, adaptability, high degree of tolerance, open-mindedness, curiosity, initiative, honesty, tenacity, positive outlook, a good sense of humor, sociability, a strong desire to go, a sense of adventure, an ability to learn languages, and technical competence. The following answers to the question, "If you had to select people to work abroad, what characteristics would you look for?", provide a flavor of their responses because they identify the ways they saw themselves as different from unsuccessful expatriates.

"Someone who was technically competent for the job at hand...You can't train anybody overseas. Second would be an inquisitive mind....someone who is not locked in on their way of life, their attitude, their cultural restrictions. Someone who asks, 'Why are they doing it that way?', 'Why is that building built in that architecture?', or 'Why do they have a procession on the third Monday in May?'"

"People can sense 'phony' in people...international diplomacy in built on a trust relationship."
"I think that they have to have an open self-awareness...I would definitely not want to send someone who was rigid in terms of their self-perception. You want to take somebody who is accepting, who would benefit generally from the experience, who would be in a position to want to learn of all an overseas assignment had to offer."

Acculturation Strategy. Another factor that expatriates connect to a successful experience is the level of commitment to acculturation. Many expatriates opt to live an American lifestyle abroad, complete with American friends, schools, churches, products, and clubs. Others choose to avoid the American community which they refer to as "the golden ghetto." Many expatriates explained their particular strategies for acculturation.

"We would not live in the American ghetto. ... we deliberately avoided it. ... I mean we belonged to the American Club and we went to the Tokyo Union Church and to the Jewish Community Center ... but other than that, we lived outside the ghetto. And sought to ... use the resources of the American Club and other American organizations as little as possible."

"[It was a very large operation] so you had sales directors, finance directors, production directors. All the top-level management people were Americans. And then there were two little American ghettos. One where the hoi polloi lived and another where the others lived...they showed me houses in both areas. And I picked the area to live with the English, which turned out to be a good move because the long-term expatriates [in this country] tend to be very similar."

"Most of our close friends were Americans outside of the business. And I didn't think that was
too healthy so I joined a rugby club. That was my way
of getting some exercise, working out some of that
good beer over there and meeting some natives."

"When I was traveling, I didn't think I
could learn anything about Peru hanging around with a
bunch of Americans at the Hilton....I'd rather stay in
one of their nice hotels down the street and meet some
people and you learn more about the country."

Among some expatriates, there's a sense of pride found
in limiting contacts with Americans. The subjects spoke
with remarkable vehemence about how other Americans "did
themselves." This was the only source of "heat" in some of
the interviews. They espoused different strategies on
living abroad but they shared one theme in common. Like
many human comparisons, the essence of their phrases was:
"what I choose to do is fine, if not downright admirable,
but more is too much." For example, the degree to which I
indulge myself materially is acceptable; more than that
constitutes conspicuous consumption. The "more" for
expatriates concerned the degree to which they entered the
other culture. Thus, people who socialized primarily with
Americans disparaged other Americans who "went native" in
their eyes and had no American friends. People who spoke
the language looked down on those who don't. And many
expatriates looked down on tourists, who are at the bottom
of the pecking order. The top of the hierarchy seems to be
the well acculturated expatriate who speaks the language,
moves freely in the other culture and perhaps also the
international expatriate circle, and possesses extensive knowledge about the other culture. In effect, there is an expatriate social structure, whether or not the expatriates have face-to-face contact. Perhaps outside the boundaries of their own culture, they define themselves by comparisons with other Americans. The following quote comes from a long-term expatriate whose family really enjoyed living abroad.

"We did try to get to know our neighbors. We did participate in activities in the communities in which we lived. We did make the effort to learn the languages. We were able to get by in the local languages in the three countries that we lived in. I have seen lots of people get turned off by Americans who never made any effort to get to know their next door neighbor. Never made any effort to learn the language. Lived in a little cocoon. But I think if you make the effort, they [the local people] certainly appreciate it. And I think it makes your whole opportunity much richer for the effort that you put into it."

This is obviously good advice from an experienced expatriate. But, along with the advice, is the unspoken message that those Americans who cocooned themselves and made little effort to acculturate are less admirable. In comparison with other Americans, expatriates feel heroic.

8. Mastery and Self-Confidence

Most of the prior sections referred to heroic acts at work or in adapting to a foreign culture. In contrast,
this category refers to the mastery and self confidence that evolves from heroic acts, defined by some expatriates as simple survival. Most of the subjects were quite explicit in their belief that they had indeed done something difficult and worthy of pride. Sojourners often suffer a loss of self confidence in the beginning phase of their stint abroad (O'Brien, Fiedler, & Hewett, 1971; Sieveking, Anchor, & Marston, 1981). Torbiorn (1982) claims that the individual loses confidence in his or her own "ideas and understanding and handling of reality as these become weakened and worn down by contact with a real world which provides them with no reinforcement" (p. 93). He views this as the cause of the drop in satisfaction that takes place during the 6-12 month period when culture shock occurs. Perhaps the increased self confidence expatriates feel is partly a reflection of having regained the self confidence they lost originally. The following quotes portray the mastery and self confidence expatriates bring home with them.

"I have a sense that I ought to be more confident. I'm proud of my family too. We didn't go to the third world, although we were probably in the fourth world. We did tackle something difficult and it had some problems and I feel good that we overcame the problems and went through tough times. Overall, we had a good time."

"I matured dramatically abroad...I think we [my wife and I] had a tremendous amount of self confidence because we had achieved something unique. We had
achieved some personal goals with which we went to Japan. We had taken advantage of the culture. We had a unique cultural experience. We had achieved reasonable fluency in the language...and we were both part of a Japanese organization and had Japanese friends...we both came back with a sense of very strong self-confidence."

"A comment was made [by a local manager] that I came to South Africa as a boy and left as a man."

9. **Personal Transformation**

An obvious corollary of mastery and self-confidence is personal transformation. As a result of their overseas experiences, all but one of the 35 subjects felt they had changed, and, with few exceptions, for the better. The ways in which they changed can be categorized as positive changes in themselves, changes in their attitudes, improving their work skills, and increasing their knowledge base. This topic is covered in a later section of this chapter, so the following quotes are included only to foreshadow that section.

"I would say that anyone who does live abroad has to change. They have to be more open to the different situations and therefore that makes them a more open person. I think you tend to perhaps be a little less impulsive and more willing to listen to the other side first rather than just making a snap decision, saying 'we have always done it this way; this is the American way of doing it.'"

"I have a greater appreciation of other people's cultures. And I don't see other people being different from me other than in their customs....There are differences that you have got to respect and accept ....It makes me more appreciative of what I have here - the educational opportunities, the job
opportunities, the idea that you can go as far as you want is more [characteristic] of the U.S. than Europe."

The first section of this chapter has focused upon the different varieties of "hero talk" - the accomplishment of difficult assignments, going it alone, feeling "special", pride in their ability to acculturate and adapt to changes, succeeding where other Americans failed, a sense of mastery and self-confidence, and finally a sense of personal transformation. These themes parallel the mythical hero's adventure. Like heroes, the expatriates overcame obstacles, triumphed where others failed, became transformed as a result of arduous trials, returned home with certain boons and a greater sense of mastery and self confidence. Their stories about their time abroad are peppered with "hero talk".

The preceding examples of heroism and adventure were provided as justification for the use of Campbell's hero's adventure metaphor as a framework for understanding the expatriate experience. A more detailed discussion of the specific components of the hero's adventure myth follows.

Campbell summarizes this myth as three rites of passage: separation from the world, initiation involving the penetration to some source of power, and a life enhancing return.
"A hero ventures forth from the world of common day into a region of supernatural wonder: fabulous forces are there encountered and a decisive victory is won: the hero comes back from this mysterious adventure with the power to bestow boons on his fellow man" (1968, p. 30).

Campbell has identified the components which appear in hero myths found all over the world. I have taken some liberty with the order and inclusion of certain subphases to better reflect the expatriate experience. The phases included in this study are underlined below, followed by a statement that explains how they relate to the expatriate's heroic adventure.

1) **Departure:**
   
   (a) *the call to adventure, or refusal of the call;* the potential expatriates are asked to move to their assignments overseas; some have refused previous international assignments
   
   (b) *the crossing of the first threshold and the belly of the whale;* surviving the difficulty and uncertainty of the settling-in period; immersing oneself in the other culture
   
   (c) *supernatural aid of a protective figure - a magical friend;* for the expatriates, this type of assistance is found in mentors, experienced resident expatriates, and in the nodes (e.g., international schools, churches, and social-athletic clubs) of social networks, or even back at headquarters

2) **Initiation:**
   
   (a) *the road of trials;* the obstacles encountered in their assignments, confronting the paradoxes of expatriate life
(b) the ultimate boon; the transformation the hero undergoes and the discovery of inner strengths

(3) Return:

(a) refusal of the return and rescue from without; issues concerning the duration of the overseas sojourn

(b) the crossing of the return threshold; actual repatriation and adjustment

(c) master of two worlds and freedom to live; domestic use of the skills learned abroad and the heightened consciousness of oneself and the world.

I Departure

1.a. The Call to Adventure or Refusal of the Call

"But whether small or great, and no matter what the stage or grade of life, the call rings up the curtain, always, on a mystery of transfiguration - a rite, or moment, of spiritual passage, which, when complete, amounts to a dying and a birth" (Campbell, 1968, p. 51).

"When they asked me, I was very excited and I talked to my wife and she was also very excited. So it didn't take long for us to say yes. We thought about it for maybe a day. It was a great opportunity in terms of both a cultural experience abroad and also in terms of a work environment....It's an opportunity to get a tremendous amount of experience in a short period of time, so from a career development standpoint, it's a fantastic opportunity. So I really wanted to go right from the start."

The Call to Adventure. In mythology, the potential hero receives a call to adventure, the "awakening of the self" as mystics have termed it. For the expatriates in this study, the call, the offer of an overseas assignment,
represented different things to different people. For the majority, it was seen as a call to adventure and/or a chance for career advancement. For others, it caused great consternation and ambivalence as they carefully weighed the pros and cons of such a move. For a small minority, the call was not welcome, but they felt compelled to accept it anyway.

Unlike other difficult assignments, the offer of an overseas assignment has the following aspects in common with the calls in the hero myths. First, it entails a journey into the unknown in a more pronounced way than most assignments. In many corporations, there is no guarantee that the expatriate will be rewarded with a promotion upon repatriation. There are even instances of expatriates being stranded abroad because no job awaits them in the United States. There is no way to know what life in another culture is like until it is actually experienced (Schutz, 1944). Therefore, moving abroad involves leaving behind the known for the unknown to a degree that cannot be experienced within one's own culture. Living abroad implies a greater physical separation from one's organization, extended family, and friends. All these parties recognize this as a greater demand to face the unknown without the accustomed anchors. The responsibility for uprooting a family with no guarantee that everyone will adjust to the
new culture or that a spouse will find work can be frightening. And finally, both the call and the experience itself induce visceral/subconscious responses. One's normal defense mechanisms and mental maps must be reorganized to cope with life abroad and before that occurs, the expatriate, like the mythical hero, will endure a large degree of uncertainty, anxiety, and unavoidable adventure. Therefore, it may be more important for potential expatriates to pay attention to their visceral response to such an offer. Whether or not their unconscious is ready to tackle such an adventure is more crucial here than with other assignments.

In the present study, many of the respondents accepted the call and saw it as a rare opportunity and flight into the romantic unknown. Twenty-eight of them (80%) were extremely excited when they first heard about the possibility. Several reported that they decided in 5 minutes or hesitated only long enough to obtain the agreement of their spouses, as seen in the quotes below. Many recounted the actual moment of "the call" with the same total recall and enthusiasm usually given to marriage proposals, even though the incident had occurred up to ten years ago.

"I remember sitting in my office downstairs on the 18th floor and the managing partner of the corporate practice group came to my office. I was still a fairly young attorney here and I thought
immediately, 'Holy Toledo, what did I do wrong that he's coming to see me?'. He told me that ... the firm had an office in Brussels...and the workload was increasing and they needed to send somebody there and would I be prepared to take an assignment of a year or two in Brussels? I said 'yes' immediately. And he said, 'Well, don't you want to think about it?' and I said I'll think about it overnight but I don't think my answer's going to change."

"I was real excited, because I had wanted to go abroad when I was in college but I just didn't have the funds to do that...So I was real excited because I always wanted to go. And it was a little scary. I never really moved like that before."

Torbjorn (1982) mentions that the expatriate should have a spontaneous desire to work abroad and even an element of idealism or a sense of mission. Otherwise, the expatriate is not likely to make the sacrifices or commitment to achieve a real understanding or an acceptance of the conditions in the other country. This resembles the acceptance of a call to adventure that involves heroic sacrifices. However, there is disagreement in the literature concerning the validity of a motivation such as the lust for adventure or a pioneering spirit. While Chorafas (1967) and Voris (1975) consider this an acceptable motivation for going abroad, Fayerweather (1959) feared that exaggerated or romantic expectations would result in greater disappointment with the reality of the new setting. The current investigation indicates that a sense of adventure is clearly an acceptable motivation and
one which many of the subjects would use as an expatriate selection criteria.

Given the proactivity of today's knowledge worker, the impetus to go abroad frequently comes from the individual. He or she seeks out the call for professional and/or personal reasons. In one case, the individual had prepared for the job.

"The experience was not entirely serendipitous. I took all my elective credits at the business school ... in Japanese language study. ... So that from the moment that I first interviewed ..., they knew that I wanted to go to Japan. As it turned out, it was two years before I actually went."

Other respondents described the "proactive call" in the following manner:

"... in a parking garage, I said to one of the guys, 'I'd like to go to London.' He said he'd check into it and he did. I was interviewed over there and was very suited to the job. I went and it worked out. It was exactly what I was trying to do."

"I asked to go and I knew that I was going from less than a month before I actually left. There is no second thought or anything like that because there wasn't time for that."

Rapid transfers like the one described in the previous quote and rapid decisions like the one described below are common.

"I constantly expressed an interest in doing this [going on an international tour]. So when my time came, I was interviewed by a national person and there is a selection process that goes [on]. It was more of a call and they said, 'Do you want to go to Venezuela or Mexico?' And I said give me a hint where Venezuela is and I'll find out something about it.' When I asked when I could let them know, they said, 'This is 5:00.
How about tomorrow by 8:30?'. Okay. Anyhow I made that decision."

Even when people have sought out an overseas assignment, they may have second thoughts.

"And I remember the phone call came and [my manager said], 'You are going to London!'. And I remember the exact moment. I was sitting in a car on West 65th Street and I remember the thought was just excitement and on the other hand, I felt a tear because I said [to myself], 'Geez, what am I doing? Because the family life is great, the work life is great, I enjoy the city.' And all of a sudden it was like I am leaving it all. I remember just being so torn for probably about a week or so and then you talked to people who had been on tours and that sort of thing. Once I got over that first week, I bought into it and it was just pure excitement."

For other expatriates, the ambivalence occurred before the call was accepted. Six of the subjects (17.1%) were ambivalent about going abroad, usually due to fears about the adjustment of their family or concerns about the job, and reported that the decision itself was difficult.

"The first crisis of course is just to make the decision to go. I mean that was a very tough decision, having a wife that had a job... a career. Two children, a mother who was a widow, etc. Just making the decision to go... took a long time. There were many sleepless nights, many long conversations, many weighing pros and cons... Finally, my wife said, 'Why don't we go for it?'. I think deep down inside I really wanted to go for it, because that is the reason why I came to international. I knew when I came to international that eventually I would be asked to take an overseas assignment. So the decision part was long and drawn out."

"[Two bosses] both approached me to take a job in Hong Kong. It happened to be on a day when we were having a golf outing here in Cleveland and I thought they were just trying to unnerve me before the golf game. But it turned out to be a serious request and I can remember calling my wife shortly before our guests
came to the golf outing and telling her. She asked what my reaction was and I said, 'Well, I was going to think about the offer.' And she said, 'If you wait more than 30 seconds before you say yes, you are crazy.'...My concerns about going at that time were more related to the position I would be in. I have always been in a line position and prefer customer contact work. The job that was offered to me was a staff position, more administrative, albeit in a much more exotic spot than Cleveland. So, while I initially would have jumped at the chance to go to Hong Kong, my reservations were whether the job was right."

While many of the subjects who accepted immediately were clearly ready for an adventure, the formula for the ambivalent people was: What will it mean for my career and family? - a cognitive, rational approach like the one described below.

"So he just, he called me up and asked me if I would be interested.... I never traveled at all in Europe other than a few business trips. My family had never been there. So, I thought it could be interesting though, because [we are] expanding into an international group. It would be good for my career development. I would learn a lot obviously that I could bring back later, sometime in my career path. So my initial reaction to that was, I don't think so, I got kids in school. My first thought was the children. My girl would have been almost a junior in high school and that is a pretty tough time for kids... If I was ever going to make a move to Europe, it would be better after she got out of high school. But in any event, we took a trip just to see what it would look like...and what the job would look like. So the children seemed to accept that—they would be willing to try that...So we just decided to do it. In a matter of a couple of months we were over there."

The preceding is filled with dissonance, concern for others, one's career, and the company. But after this agonizing, the family, as a unit, accepted the call. With few exceptions, this group of spouses was willing to go
abroad and adjusted well. Several subjects mentioned that their wives were more adventurous than they and had really encouraged them to make this move.

Often the call is an urgent plea for temporary help but, as events unfold, the duration extends and the visitor becomes a sojourner, as reported in the following quote.

"The first I heard about the position was — I did not even apply for it. I was just asked if I would go over for ... six months, just to try to maintain the function and see how this new fellow would do and if he could grow into the job. If so, great! I would pack up my bags and come back home and if not, I would stay on until we could find a new manager. And he did not work out. So I stayed on ever since."

This theme, finding unforeseen conditions, is part of the hero's adventure. But when the dangers become known, the hero can choose: Do I go with the original terms or must I negotiate? This is a common statement found in the transcripts of fairly senior people and/or people with previous expatriate experience, "I'll go under certain conditions and if I'm my own boss."

"... we got the word back here that the whole problem was in the plant. When I went over and talked with the different people, it wasn't all in the plant. There were a lot of management problems. So I said, 'If you want me to go back there on a two or three year assignment, then I want to know definitely that I got two years minimum. And I had estimated that we were going to need about three quarters of a million dollars to turn the business around. I said, 'I need the commitment on that ....' After some keen discussions with the president of the division, he agreed. So went over and after eighteen months we started making money, and it went up from there."
Some individuals refuse overseas assignments at one time or another. In this study, the subjects reported an unwritten norm in their companies that allows only one refusal, usually due to personal or family reasons. The second call, however, must be answered if one is to be seen as having the organization's interests at heart. In reality this norm may be counterproductive. The qualitative data from the interviews indicate that the desire to go abroad is strongly related to the expatriate's overseas adjustment. Several subjects identified "strong desire to go abroad" as an important expatriate selection criteria. Furthermore, those expatriates who were ambivalent or downright unhappy about going were less adjusted than those who wanted to go. Torbiorn's (1982) explanation that succeeding abroad requires considerable energy and commitment appears reasonable. People who do not want to live abroad seldom make the necessary effort; thus, they remain either marginalized in solitude or enclaved with other unhappy Americans. As a result, they receive little gratification or reinforcement from the overseas setting which makes them try even less to adjust, creating a vicious cycle. The unanticipated consequence of corporate policies that insist upon international experience for top management positions is that some people are forced to choose between two equally distasteful options—working
abroad or career stagnation. Forcing reluctant managers abroad may cause them to fail and cause the company more harm than good.

"I had no desire to make international my career. ... If there is a professed company culture that the only way you can progress within an international company is to have international experience, and you don't have it, you better get it. ... Don't refuse to go overseas more than once. And I already had refused once. And I was never told, but it was intimated very strongly. So in a way, I did not have a choice. If I wanted to stay with the company, and I wanted any opportunity for further advancement, it was something I had to do."

"I was offered the same position in 1978, which would have been eight years earlier, and I turned it down, based mainly on personal reasons. Then in 1985 ... they wished me to take the position .... Still a difficult choice. ... Our daughter had gone on .... So it was my wife and myself, which made it easier to make a decision. But on the other hand, my wife had gone to work. ... And to ask her to leave that position was difficult. ... And one of the most thought provoking and difficult situations surrounded my wife giving up her job .... So she decided to stay here for a while. Which made it, frankly, a difficult move for me. But that's the personal side. ... But I went ahead, charged forward, took over the office .... The year 1986 was a kind of turnaround period. ... later she joined me ...Frankly, it made it a lot better. But, from the business point of view, we saw a lot of progress."

The last expatriate put career achievement ahead of personal considerations and succeeded, albeit at great personal cost. Going abroad as a single person or with young children is relatively uncomplicated. However, high school age children and spouse's careers become extremely important considerations and constraints. The entire family has to answer the call or at least make a commitment to
work at adjustment. If the expatriate makes such an important decision alone, answering the call can be the prelude to personal tragedy. At the same time, a refusal to answer the call can lead to stagnation, which is described in the next section. Opting for the hero's adventure is clearly a high risk-high gain proposition for some.

Refusal of the Call. In mythology, a refusal of the call is dealt with harshly. Campbell (1968) colorfully describes what the refusal of the call has meant in mythology.

"Refusal of the summons converts the adventure into its negative. Walled in boredom, hard work, or 'cultures,' the subject loses power of significant affirmative action .... His flowering world becomes a wasteland of dry stones and his life feels meaningless.... All he can do is create new problems for himself and await the gradual approach of his disintegration... The myths and folk tales of the whole world make clear that the refusal is essentially a refusal to give up what one takes to be one's own interest" (p. 59-60).

Some of the expatriates reported that refusal would have led to the nagging question, "What if ...?"

"I was just afraid that if I said no, I would just be second guessing myself for the rest of my life. I mean, it might be miserable, but I have got to try it just to see what it is like."

Certainly it is possible for us to accept the call without leaving our borders. A perilous journey across dark seas to the unknown makes the adventure more explicit
but we can all respond to a call to adventure. It can be heard in the film, "Dead Poet's Society", which may explain some of its popularity. "Seize the day" is the exhortation of an English instructor in a boys' prep school. ("Follow your bliss" was the exhortation Campbell gave to his own students.) One boy answers the call to become an actor, is punished by his conventional father, and commits suicide. This resembles Campbell's (1968) use of Freud's castration complex to make his point concerning the refusal of the call.

"One is bound in by the walls of childhood; the father and mother stand as threshold guardians, and the timorous soul, fearful of some punishment, fails to make the passage through the door and come to birth in the world without" (p. 62).

If one can answer the call and stay at home, perhaps one can also go abroad and still refuse the call. One of the subjects in this study sought out the experience of working abroad for career reasons. She spent almost all her time abroad working and insisted that there were no cultural differences between the United States and her country of assignment. As a result, she had a very limited adventure.

"London worked out exactly as I wanted it to but it wasn't a life. It wasn't very satisfying working all the time...You succeed but it's not what you wanted - Is that all there is?"

Campbell states that the price of the refusal of the call is meaninglessness, which is clearly a theme in the
previous quote. Furthermore, a refusal in mythology represents a lack of selflessness. This subject's words uncannily echo Campbell, "I did what I wanted to do and it wasn't enough." This exceptional case signifies that it may be possible to go abroad without really accepting the call. In any event, as Campbell (1968) states, the hero gets the adventure for which he or she is ready.

1.b. The Crossing of the First Threshold and the Belly of the Whale.

STRANGER

"The Stranger within my gate,
He may be true or kind,
But he does not talk my talk—
I cannot feel his mind.
I see the face and the eyes and the mouth,
But not the soul behind.

The men of my own stock
They may do ill or well,
But they tell the lies I am wonted to
They are used to the lies I tell;
And we do not need interpreters
When we go to buy and sell.

The Stranger within my gates,
He may be evil or good,
But I cannot tell what powers control—
What reasons sway his mood;
Nor when the Gods of his far-off land
May repossess his blood.

Rudyard Kipling

According to Campbell's scheme, the next step in the Departure phase after the call, is the presence of a
magical friend. However, for the expatriate, the order is likely to be slightly rearranged. The presence of a magical friend is more likely to come after the crossing of the threshold, described in the following quote from Campbell.

"The adventure is always and everywhere a passage beyond the veil of the known into the unknown; the powers that watch at the boundary are dangerous; to deal with them is risky; yet for anyone with competence and courage the danger fades." (p.82)

There are two key aspects to the previous passage. One is the idea of crossing a threshold, i.e., the boundary of the hero's present sphere or life horizon. For expatriates, that represents leaving the known quantity of their life in the United States and venturing forth into a strange culture, broadening their perspective on life. The uncertainty and difficulty of their first months in a new country represents the crossing of this boundary.

The second key point refers to the presence in hero myths of threshold guardians whose job is to watch the established boundaries. A paradoxical situation results because one is not supposed to challenge these guardians. And yet it is only by advancing beyond them and provoking destruction that the individual passes, either dead or alive, into a new zone of experience (Campbell, 1968,p.82). The following section will explain how these two aspects of the Initiation Phase relate to the expatriate experience.
Crossing the Threshold. Campbell describes the other side of the first threshold in the following manner:

"Beyond ... is darkness, the unknown, and danger ... The usual person is more than content, he is even proud, to remain within the indicated bounds, and popular belief gives him every reason to fear so much as the first step into the unexplored .... The regions of the unknown (desert, jungle, deep sea, alien land, etc.) are free fields for the projection of unconscious content ... suggesting threats of violence and fancied dangerous delight- not only as ogres but also as sirens of mysteriously seductive, nostalgic beauty" (1968, pp. 77-79).

The difficulty and uncertainty of the settling-in period is generally a stressful time for expatriates, as it is for anyone experiencing significant changes in job, social support, and setting. However, the inherent difficulty of moving and creating a new life structure is exacerbated by crossing the threshold of another culture. Some of the expatriates' problems relate to language ability, confusing perceptions of the culture, and lack of social support. However, a prominent source of concern is the ordinary details of living. The ordinary becomes the extraordinary and it is not until the expatriates have developed a routine that they feel settled in. The following quotes portray the uncertainty and difficulty of the first days.
"We arrived on a Saturday morning around 10:00–11:00 in the morning. Figured we could go out and stock up on some things on Saturday afternoon, except all the shops closed at noon on Saturday and we were just out of luck until Monday morning....The second thing we had to do once we got there, we had to start buying furniture. Now this sounds like an easy task, filling a house full of furniture [but]... dealing with everybody in German. But we managed to get through it and we soon had enough furniture to move into the house. And there were a lot of ups and downs at first, I would say 6 months to a year. And then things settled down and we were more or less into a routine."

[WHAT WERE THE FIRST FEW DAYS LIKE?] "Sheer panic. Other than that, 'hey, no problem.' There wasn't a lot of time to indoctrinate me. ...My very first day in England I went into work just to get the car....It was a stick shift. I drove a stick shift about 15 years ago for about a month. ...Now let's see, a stick shift. How does that work? ... The manager who was leaving drove me to a petrol station, filled it up for me and said, 'Okay, here is your driving lesson.' So I jerked back [to the facility about a mile or two away] and he proceeded to show me where all of the little gizmos were on the car. He said, 'Okay, you are on your own!'. And there I was with the car and no map and 200 miles to drive that day with a stick shift sitting on the wrong side of the front seat. It was a little terrifying, a white knuckle drive. The first few days were typical in that respect."

"It was a very strange experience that we both get dropped into this country, that we immediately feel very comfortable in [because their ancestors were from that country and they had heard the language] because people talking around you...sound familiar. And you can understand certain words. But it is still totally different, totally foreign. So it was an unusual experience."

"[HOW WOULD YOU SUM UP THE FIRST 6 MONTHS?] Uncomfortable and unhappy. It's hard to believe that it would be because the first 6 months we did a lot of traveling too, and interspersed among those general unhappy feelings were a lot of good times and things that we never would have seen. And maybe that's another way to sum it up. It was like a yo-yo. One moment you'd be way up, you'd be really enjoying
yourself seeing something [new] and maybe you'd found somebody friendly and it'd be really a good feeling. And the next minute you'd have that feeling of a mixture of everything bad - homesick, lost, can't understand everything that's said to you even though it's English. All of it together so you were just up and down...on the whole, pretty uncomfortable."

One of the long-term expatriates described his first few days in Venezuela as follows.

"Rather hectic as usually they are. Of course the first few days generally in a move like this, you are in a hotel, because your belongings have not caught up with you yet. And you are trying to do a whole series of things. Certainly the business aspect of trying to get to know the people who are already on the staff, trying to out what additional requirements you have. But at the same time you have got family problems, or family things that need to be done. Such as trying to find a house,...making sure that children were registered in school and getting those kinds of things taken care of. Getting a car, all of the things that you need to start operating normally."

For some expatriates, crossing the physical threshold is a simple matter in many respects. Especially for the younger expatriates, the adventure carries them through the physical arrangements. One of the younger expatriates summed his first 6 months up in Tokyo as "having died and gone to heaven." Certainly circumstances are very different if an expatriate moves into an organized household vacated by a predecessor. Therefore, the particular type of threshold which gives an expatriate pause may well vary for different people. For some, it's the physical differences and getting settled in and the "surprises" that Louis (1980) mentions. For others, the more figural threshold is
likely to be the cross-cultural one as they struggle to make sense of a different culture.

Uncertainty and learning are the best words to describe their experiences during the first 6 months.

"..just to have to adapt to all the systems that they have. They were just different from here. The basic monthly reporting package was different. The whole set of policies and procedures were different to ours. And I had to try to acquaint myself with all of that. And gradually get to know who the key characters are in the country and what they do and who can help me and who can't."

"It [the first 6 months] was a tremendous learning experience. Yes, that's when all the learning comes. In other words, you walk in, you don't know anything. And people have to train you and show you how to do stuff. And give you a knowledge base. And after you develop that knowledge base and these working relationships, then you start to become functional, productive."

""A very high rate learning experience would be in one sentence the [way I'd sum up the first 6 months]. A high rate of learning business and a high rate of learning the culture. And, in fact, that was a very rapid ascent and then probably leveled off after that first 6 months."

For many of the men, the transition is much smoother because they leave one office and go to another. Other researchers have written about the greater difficulty of wives (Adler, 1986; Gaylord, 1979) as they struggle with the initial arrangements, often without the help of their husbands. They are also faced with the task of creating a
life "from scratch", a challenge few people have experience
tackling.

"I arrived, was met at the airport by the general
manager, who was an American and his wife. And the
bank car and the bank driver. We went to the Imperial
Hotel. And the next day I started work. And I walked
into the office and I had a desk and a secretary and
fortunately, everything was laid out for me. And my
wife had nothing. She woke up and had no structure to
her day. She really had to construct her life and
fortunately did it."

"I felt a bit drugged that first day [from the
flight]. And immediately I left Nancy to her own
devices and she started looking around for a place for
us to live more permanently. I went on my first
business trip ..the second or third day. I left her
and took off. ...I knew that was the plan probably a
month beforehand which didn't make it any easier for
either of us when it happened. I felt disoriented
certainly. But eager to get in touch with our new
surroundings."

"The problems with the butcher...and with food and
all that kind of stuff were an adventure for awhile.
We just enjoyed it. My wife is a very outgoing
person. And I had the fort of the office. And very
often I would work seven days a week. Just because it
was comfortable. I had my desk and my stapler and the
people there, all the guards and everything, knew who
I was and would take care of me. Brought me my water
and tea and made sandwiches and things like that. So
it was more comfortable for me inside the fence and it
took awhile to get out on the street. It just took
awhile. It was a strain on the family because I left
it all to them, you know. I left the problems to them
while I went to work. There was a lot to do too."

The 6 month mark was repeatedly given as the time when
people began to feel comfortable and had established a
routine. The length of time abroad has a tremendous
impact upon attitudes because of the predictable phases
expatriates experience.
In addition to the strangeness, exhilaration, difficulty of this threshold time, it is also described as a time of intense learning.

"It was quite a frantic pace. Starting off with the broad problem right away which set up a bit of an urgency to set up some other similar types of jobs. We lost one of our people which put more on those that were left to keep the pace up. There is definitely an intensive learning time. Because for the first time in the department at least, I had supervisory duties. I had to get used to the people and what they responded to and what they didn't respond to."

The Threshold Guardian

"With the personification of his destiny to guide and aid him, the hero goes forward in his adventure until he comes to the "threshold guardian" at the entrance to the zone of magnified power. Such custodians bound the world in the four directions - also up and down - standing for the limits of the hero's present sphere, or life horizon. Beyond them is darkness, the unknown, and danger; just as beyond the parental watch is danger to the infant and beyond the protection of his society danger to the member of the tribe." (Campbell, 1968,p.77)

In the myths, the guardians of the threshold were often ogres, dragons, or monsters whose purpose was to keep the unworthy from passing on to another region. Only courageous and clever heroes survived their encounters with these guardians. Some expatriates did complain about specific individuals in the overseas office who had assumed ogre-like proportions in their eyes, but, for the most part, the threshold guardians for expatriates come in less obvious forms - (1) lack of language ability; (2) the
impermeability of certain cultures; (3) the tight leash of some company headquarters; and (4) the restrictions of the American communities abroad. The following quotes illustrate the role of these threshold guardians.

1. Lack of Language Ability

Learning the language was another form of threshold for the expatriates to cross, and one that has been to correlate with effectiveness.

"Work-wise, it was terribly difficult because all of the papers were in Spanish. It is one thing not to be able to understand when somebody is talking to you, but when you don't know what it says on a piece of paper in the first place and it is hand-written, you can't even get the dictionary out. That was difficult. But by the end of 6 months, I had that pretty well in hand. Personally I would say I was quite content after 6 months. That was just about the time I had stopped being frustrated and sort of fell in with a group of people."

"I think the one fortunate thing that was both difficult and the most frustrating was all the business was conducted in English. ...It was really impossible for me to learn ...Dutch. I was in France, I was in Germany, I was in Spain, I was in Italy. Even knowing it was a 2-3 year period, I knew I was not going to learn Dutch and that frustrated me. Because living in a foreign country, you are not comfortable, you don't feel a part, truly a part of the country [if you don't speak the language].

"I think my colleagues at the University generally accepted me. I think they were generally appreciative of me speaking, or trying to speak the language. ...and I think the people open up more to you then."

"The language was a problem, because you could not talk to anybody. So socially we were real bombs."
Being able to speak the language meant that local people would open up and share more about their culture. In turn, the expatriate could feel more a part of the local culture and experience it more fully.

2. Cultural Impermeability

Many authors have written about cultural characteristics, similarities and values (Hofstede, 1978; Torbiorn 1982), but there are apparently no studies of the comparative permeability of various cultures. And yet, this may have much more impact upon the expatriate's ability to enter another culture than similarity of values. For example, the British are perhaps most similar to Americans in their cultural value patterns; however, many subjects reported that it was difficult for Americans to be accepted in Britain. The anti-American feeling that exists in many parts of Europe also inhibits relationships, in spite of our common heritage. England, Luxemburg, the Netherlands, Japan, Hong Kong, and Korea were all identified by the subjects as cultures in which it was difficult for Americans to be accepted. The following quotes illustrate the impermeability of these cultures.

[HOW WOULD THE PEOPLE YOU SOCIALIZED WITH DESCRIBE THE LUXEMBURGERS?] "Probably cliquish is a good word. A lot of those people [third country expatriates] were not going to be there for a long time either. And so they never made all that much
effort to fit in. But it was still hard if you tried. It wasn't easy for anyone [to be accepted] if you didn't speak the language."

"The Luxemburgers were a closed society. If I had people invading my country for the last thousands of years, every 30 years...they start telling you about how their fathers were impressed into this army or that army."

"They [the Luxemburgers] were very cold for the most part, with a few exceptions. They keep to themselves. [I got to know the neighbors] by playing with their kids. I'd play ball out in the street."

"[It's] not real easy [for Americans to be accepted] but not impossible. There are certain things you have to know about the way they [the English] are. They are not as open; we're more willing to talk. Don't take it personally that you're not having success meeting someone."

"The Dutch are very hard to know closely. You never make a Dutch friend the first time you meet him. The second or third time, ok. And that first meeting will be hard. They don't go out of their way to meet anyone. But if you do...get to know them, they are friendly, warm people. It is just this exterior facade...It is a small country with a very dense population....part of it is their upbringing too."

"We started out socializing with transient expatriates. And we ended up avoiding [them] and spending all of our time with Japanese friends or American friends among the permanent expatriate community....I think it is very difficult to become friends with the Japanese. I should say that the Japanese also become very distrustful of Americans who appear too acclimated, assimilated to the country. It was interesting that we found that our proficiency in Japanese opened a number of doors to us when we first arrived, when we were first still learning. But after we learned Japanese well enough that we started to lose our American accents and where we could speak on the telephone and have other Japanese think that we were Japanese. ...That's when the Japanese would become distrustful. Distrustful is the wrong word. They lose their standard ways to deal with Americans. They know you can see through the facade...They wonder if you have compromised your own national identity in order to learn their language so well. And that type of compromise, generically speaking, would not be well
regarded among Japanese...it's a very important concept to them."

Even if an expatriate wanted to cross the threshold into the foreign culture, the task would be made more difficult by that culture's attitude to foreigners. Despite this relative impermeability, the expatriates did manage to enter these cultures but it required more effort on their part to get beyond this threshold guardian.

3. Headquarters Constraints

Some organizations place constraints upon the expatriates that make it difficult for them to enter other cultures. For example, the travel time required by some jobs makes it virtually impossible for the expatriate to learn a local language or develop local friends. Other companies ignore the advice of the expatriates and force them to do things that are so culturally inappropriate that the expatriate's credibility with the local culture suffers. The allegiance of the expatriate is a concern for some headquarters. Rather than encouraging their expatriates to become acculturated, they emphasize adherence to the parent company's attitudes and ways of doing business. Adler (1986) found that the less acculturated expatriates were perceived by headquarters as being most effective, because their allegiance was never in
question. Becoming too acculturated is a source of concern at some headquarters, as is seen in the following quote.

"We met many people [Americans] that were loud and didn't even know they were in a different place and really didn't have any respect. We saw a lot of people push, the American kind of bullying and the due dates and all that which is expected here. I've been criticized for the way I handle those things. I am looser than a normal American. I got rated very, very high in my performance with the South Americans. The review went on and on and I said [to the HQ person], 'Is this going to hold me back with a domestic position?'. About knocked the guy right off his chair. He said, 'Well, I am afraid to say it probably will.' Because of the things I got rated for, compassion, working with the people and doing it their way, and getting them to cooperate and all that stuff. I didn't kill anybody. I didn't beat anyone up and swear at them."

The following quote is an example of a headquarters demand that placed the expatriate in a difficult position and affected his credibility with the host culture.

"When somebody you have respect for in Cleveland gives an order to study closing down a plant, and you know that's something you really can't do. I mean, you just opened the plant. You just moved machinery and equipment there. You just had all these people commit hours and hours of time to moving their families there. And now you are telling them, you have to now tell them with a straight face, well, let's study closing the plant. I think you try to represent the company as best you can in order to make them feel like they are not a bunch of idiots back in Cleveland. But sometimes you can't do that."

4. The American Community

The role of the American community overseas is a fascinating one. For some expatriates, it serves as a
cultural mentor; for others, it functions as an organizing principle around which they structure their lives. For still others, it allows them to "move away from [foreign] people" in Horney's (1950) terms, and stay with their own kind. Even those subjects who had nothing to do with the American community still made comments, often vociferous ones, about it. The pride in avoiding Americans that was mentioned as an example of "hero talk" relates to the perception of the American community as a threshold guardian among some expatriates. In this instance, the guardian is part of one's own culture that has the potential to hold the expatriate back from crossing the threshold and experiencing another world. There were many references to the American wives clubs; these were both positive and negative, depending upon the acculturation strategy of the expatriate. The following quotes illustrate the negative perception of these organizations.

"...The Americans had their own [social system]. I guess someone told you about the Americans....a lot of them had kind of their own little community too."

"A lot of those people [expatriates who did not have a good experience] would not expand their group of friends outside of the American community. And in some areas, where there was a relatively small [one], it became very cliquish and was a very limited group. Every time you would get together, it was the same rehearsing of the same things over and over again. So they took a very narrow [and negative] focus."
"There was a group of Americans who would get together every month and bitch about the Mexicans. But it was the Mexicans who had helped us out when we first arrived, not the Americans, and we certainly weren't interested in listening to the Americans bad-mouth them."

The positive aspects of the American clubs can be seen in the following quote.

"[We socialized with] Americans because we could share experiences with them... My wife became active in the American wives groups and we went to their parties and functions."

The Belly of the Whale. Beyond the first threshold, is the "belly of the whale." The mythological significance, according to Campbell (1988), is as follows.

"The belly is the dark place where digestion takes place and new energy created. The story of Jonah... is an example of a mythic theme that is practically universal, of the hero going into a fish's belly and ultimately coming out again, transformed... Psychologically, the whale represents the power of life locked in the unconscious. Metaphorically, water is the unconscious, and the creature in the water is the life or energy of the unconscious, which has overwhelmed the conscious personality and must be disempowered, overcome and controlled... You see, consciousness thinks it's running the shop. But it's a secondary organ of a total human being, and it must not put itself in control. It must submit and serve the humanity of the body" (p. 146).

The idea of "the belly of the whale" for the expatriate represents throwing themselves into the other culture. Up to this point, they have physically left behind their own country; this phase, however, refers to the
psychological leave-taking of their own culture. It becomes an inward journey into themselves. For the first time in most of their lives, they are forced to examine their lives (in order to create a new one abroad), their basic assumptions and values, and the superiority of their own culture (Schutz 1944). In order to become active participants in the other culture, expatriates must relinquish the unquestioned nature of their own culture and open themselves to learning about the new one. Learning is the major theme in the expatriates' interviews. Yet it is seldom mentioned in the expatriate literature.

Not all expatriates throw themselves into the belly of the whale to the same degree. Some merely take a cursory look inside the whale's mouth before buffering themselves from as much cultural contact as possible. However, the degree of contact affects two aspects of the expatriate condition — the dualistic nature of the cross-cultural experience (the inherent paradoxes to be described later) and the access to the unconscious. Campbell's previous quote points out the importance of allowing the unconscious to release "the power of life" so that consciousness is not "running the shop." Only by permitting themselves to experience a higher level of consciousness can heroes be transformed. The next section, which discusses the magical friend, explains the role that
cultural mentors play in helping expatriates cross the threshold and go into the belly of the whale.
l.c. *Supernatural Aid - a magical friend*

"For those who have not refused the call, the first encounter of the hero-journey is with a protective figure (often a little old crone or old man) who provides the adventurer with amulets against the dragon forces he is about to pass" (Campbell, 1968, p. 69).

"And the person who became, in many respects, my mother...who I guess was a colleague of mine, not a contemporary in any sense of the word. She was in her early sixties when I went to Brussels.... Personally, she adopted me, gave me untold, unsolicited advice about how I should part my hair and what clothes I should wear and what language I should speak and how deferential I should be, all sorts of things. ...She basically looked at me in the Ugly American role and viewed it as her job to educate me into the ways in which refined people in Europe conduct themselves. And so she would take me along to luncheons and dinner parties and introduce me to all the right people and make sure that I said the right things at the right time....She's quite a character, but yes, she was my cultural mentor."

In the hero's adventure myths, the magical friend makes his or her appearance before the hero faces the trials and tribulations of the journey. This order may or may not apply to expatriates; some experience trials before they find a source of aid.

In mythology, the magical friend helps the hero on their journey either by explaining how to get beyond difficult obstacles or by providing assurance that the hero will not be harmed. Ben Kenobi, the elderly knight in Star Wars who taught Luke Skywalker how to use both a weapon and "the force", is an example of a magical friend. The guide, teacher, or ferryman in myths are other examples of
magical friends. In Christianity, this spiritual aid is provided by the Holy Ghost. According to Campbell, such a figure represents the benign, protecting power of destiny.

"One has only to know and trust, and the ageless guardians will appear. Having responded to his own call, and continuing to follow courageously as the consequences unfold, the hero finds all the forces of the unconscious at his side" (1968, p. 72).

The aid needed by expatriates also has an echo of the supernatural to it because of nature of the experience.

"Learning to live in an alien society is much more than learning to speak a strange language, to eat unfamiliar food, and to observe different social customs. It involves a subtle but important change in one's expectations of oneself and of others and in the controls one feels over his emotions. One has to learn to do many new things and to stop a number of actions that are of long standing. But, more important, one has to cope with a loss of identity and familiarity and to get along without some of the social events that provide encouragement, direction, and meaning in our lives." (Guthrie in Textor, 1966, p. 95)

The extreme novelty and stress of the situation, coupled with the expatriate's lack of knowledge about how to obtain social reinforcement in the new culture, signifies a forced return to childhood and dependency. The opening quote in this section, in which the expatriate referred to his cultural mentor as his "mother", indicates the degree of dependency he felt. The following quote is another description of dependency.

"[The first phase of my time abroad] was 'social infancy' and the biggest problem was being so dependent. And the second one was making so many mistakes.... [HOW DID YOU RESPOND TO THAT DEPENDENCY?] I just observed what happened. I listened. I asked a
lot of questions of people who could translate and explain what had been said so I could understand not only what they had said but why they had said it. [In the next phase] adolescence, I was able to identify more and more of these things but I couldn't respond [to everything]. And there'd be other cases where I'd either be cheated or laughed at or made fun of or used, ...and I wouldn't even realize it. Getting into the [phase] I call maturity, all the other learning curve episodes had passed. I was more in command of my situation at the plant and I was more independent out in the world and it was pretty enjoyable."

A return to childhood evokes our dependence and recreates the early family experience in which all adult helpers are gods (Rank, 1959). In addition, the ubiquitous incongruity in the expatriate experience arouses affect (Hunt, 1963) which may open a doorway to the subconscious. The qualitative research on Peace Corps volunteers indicates that those who gained a deep understanding of the other culture could only describe their experience in religious terms, even though they were not actively religious and had never used this terminology previously (Szanton, 1967).

With the expatriates, the mentor is seen as both the guide who allows individuals to be all that their talents and personalities will permit and as the source of the deep seated conviction that "things will work out." In a sense, the "Magical friend" is a metaphor for getting through life by relying on more than one's cognitive, physical, and professional skill.
The closest approximation of a magical friend for the expatriate is the cultural mentor. These are usually members of the local culture who have had previous experience with Americans. They extend themselves to translate the local culture for the expatriate, much like Bochner's "mediating person" (1981). Some of these mentors may well be marginal members of their own culture.

However, the function of the magical friend is not limited to a mentor from the host culture. This function can also be performed by other Americans, experienced international residents of various nationalities, a career mentor back at headquarters, or by social or commercial networks - the international schools, churches, social-athletic clubs, and business associations like the Chamber of Commerce.

Nineteen of the subjects (54.1%) reported that they had a cultural mentor abroad, "someone they could confide in and who could explain the local culture to them." The following quotes describe typical relationships with these "magical friends".

"One particular person on the staff had been a working colleague in the previous years. And he and his family gave me an opportunity to exchange thoughts on my observations in the society, to confirm or for them to reject my perceptions. So it helped me to learn more about them. Because it was probably my closest exchange with local people."

"Our neighbors ... would explain why things were done that way and how it's done and the significance
of it. See, like, you've heard the rhyme 'You ride a cock horse to Barberry Cross?' Well, Barberry Cross is the geographic center of England. ... So you get into the nursery rhymes ...."

"I'd say there were two of my Japanese coworkers who I regarded as mentors, and they regarded me as their protege to a certain extent. And those were probably the closest relationships I had among my coworkers. And both those individuals were quite a bit senior to me in terms of age and certainly in life."

Interestingly, the individual speaking above was an appropriate age (late 20's-early 30's) for a mentoring relationship (Levinson, 1978) in a country where mentoring is common. He made a very interesting observation about hierarchy and consensus which could be related to the need for mentoring in a social system characterized by detachment.

"Now the fact that they have a consensus decision process working within a rigid hierarchy is not necessarily contradictory. The hierarchy is maintained by a very strict code of conduct and communication between yourself and various people elsewhere in the hierarchy. And ... to assure that ... those standards of communication are maintained, there is a detachment, a personal detachment between yourself and everybody else in the firm that guarantees that there will never be a situation that would threaten that code of conduct. And so for that reason, I never really developed a close personal relationship with any of my colleagues. I had to have that aspect of doing business explained to me in very explicit terms by one of my mentors. Because I, at this point, became perplexed at my inability to become close with any of my workers. ... The theme of that lecture was 'being a manager is the loneliest job in the world'."
The issue of mentoring was seen as crucial to one of the respondents who gave the following advice for a person going abroad:

"I would say to probably find somebody who has been there previously in that particular country, city—city especially, if you can. Find some contacts, expatriates that are in the country that you can talk to and lean on, really, for support and for help in getting through the original, the initial bureaucracy. And all the small things, I mean, the shopping. Where do you go for this and where do you go for that? Who do you see for this? ... for myself, it was important to have a good special foundation. Because I found to me, that helps me, that I can lean on God and get through things. So I got Him; I got no problems. I try to deal that way here in the United States as well."

The "magical friend" that has been most prominent throughout human history has, of course, been God. Reliance on this "magical friend" has been an important coping strategy for living through stressful periods, as well as providing a metaphysical system that explains cosmogony and existence. The church was also seen by some expatriates as a source of both help and friendship.

"Well, there were people, as I said, who we met at our church. And they were generally very helpful because they had been through most of it. Most of them had been there for a few years. ...There were some people who had started coming to the church that were German citizens. And we got to be friends with several of those people, and that helped even more. You know, they were people that were interested in speaking English, yet they were very proud of telling us about what was going on in the country. So it was really nice. And I guess this was where again, speaking a little bit of the language helped. We went
on some trips with them... It was kind of a nice thing."

The dependence upon the church, international school "PTA's", and groups like the Chamber of Commerce are familiar systems upon which the expatriates have relied at home. Therefore, they are already comfortable with these organizations and transfer their trust to the new organization and its members without the questioning that characterizes their stance toward the other aspects of the new culture. Their dependence upon these groups is also an accustomed habit which is readily transported. These social nodes may not be exactly the same as those found at home but they are close enough to provide expatriates with the information and a ready made social network to help them bridge the two cultures. As such, these organizations represent a "plus one" change, a form of "controlled dissonance", for the expatriates which can be readily assimilated. These social nodes can also perform the function of the threshold guardians discussed in the preceding section. Ratriu (1983) states that the "most international" expatriates he studied went back and forth from safety zones, like these social nodes, to greater involvement in the local culture. The less adjusted expatriates would spend more time in the safety zones.

Mentoring and social support often go hand in hand. It was interesting that many subjects reported an evolution
in the nature of their socializing. In the beginning, they socialized with Americans because they had common interests and could receive answers to logistical questions. As time went on, they sought out local friends, often those who had previous contact with Americans, or with long-term third country expatriates. When questioned about this transition, they stated that they wanted to avoid "grumblers" and were interested in learning about other cultures.

Eight of the subjects (22.9%) reported that they had no one "magical friend". Rather, when situations arose where assistance was needed, different people, usually co-workers and neighbors, were approached.

"Generally before we left, we tried to find out as much as we could, either by reading or someone who had been there, to try and learn a little bit about the local culture before we were dropped into it.... Once we got there, I suppose in most cases, we used the people who we worked with in the office as sources of that type of information. Neighbors as well."

A logical place to find a work mentor is in one's predecessor who, in the following case, was also a member of the local culture.

"I suppose my predecessor [a Brit]... filled that role for me. At least during the three months that he was there. Of course, we have subsequently talked on the phone, certainly every week, normally every day."

While some expatriates seek enlightenment about local logistics and cultural understanding, others are more concerned with their relationship with Headquarters. What
may be vital for them is not so much the information side of mentoring but simply feeling supported somewhere. For one high level manager, this support was found back in the U.S.

"So I kept in touch weekly or more often if necessary, with him on more of the business matters. And the supportive role that he played.... I think that kept a close relationship between the home office and [me]... I never felt isolated."

For expatriates like him, it is the "can-do" feeling he receives from headquarters that supports him in his work accomplishments that is important.

Seven of the expatriates (20.0%) had no one in which they could confide or ask questions about the local culture. However, the quantitative aspect of this investigation revealed that expatriates who had a specific cultural mentor had higher ego development and incongruity tolerance, were more aware of paradoxes, were more effective and received higher performance appraisals, were more fluent in the foreign language, and were better adapted to their work and general living conditions abroad.

Magical friends help expatriates navigate their adventure and provide guidance about the trials they encounter. The next section portrays a particular type of trial - the paradoxes inherent in the expatriate experience.
II. Initiation

2.a. The Road of Trials

The second phase of the hero's adventure is the initiation phase which consists of both "the road of trials" and "the ultimate boon". There are many obstacles and hardships that confront expatriates, particularly in their first six months abroad. However, this section focuses upon a different type of obstacle - the paradoxes inherent in the expatriate context.

"The test of a first-rate intelligence is the ability to hold two opposed ideas in mind at the same time and still retain the ability to function."
F. Scott Fitzgerald

Paradox is a strong theme in Campbell's interpretation of mythology. Mentors and threshold guardians are both positive and negative figures, helpful to some, harmful to others. They represent the polarities that exist within our own subconscious. In addition to the paradoxes found in mythology, the recent spate of management books and articles on paradox (Peters & Waterman, 1982; Quinn, 1988; Quinn & Cameron, 1988) indicates that this topic also has validity in the domestic setting. Abroad, paradoxes occur because expatriates are mediating between two cultures and two organizations and they have fewer anchors and accepted forms of etiquette to guide them. Cultural uncertainty is exacerbated by language barriers. As a result, the trust
and implicit understanding that is taken for granted within one's own culture and organization has to be developed consciously abroad. Paradox is the shadow of the ubiquitous ambiguity and uncertainty in the expatriate experience. Individual paradoxes represent complexity frozen in time and our inability to index priorities outside our own culture. Because so much of our culture lies within our subconscious (Schein, 1988), we are more likely to take domestic paradoxes for granted. Abroad, the greater degrees of difference or intensity turn some paradoxes from figure into ground, in Gestalt psychology terms.

One of the major research questions in this study is, "Do expatriates experience paradoxes and, if so, what are they?" The answer to this question is "yes"; they experienced both the paradoxes that were explicates for the study and others that emerged in the course of the research. The percentages of subjects who reported each paradox ranged from 46% to 77%. The average number of paradoxes reported was 5.43 (SD=2.06). Table 4.1 presents the incidence of the explicates paradoxes. (See Chapter 5 for more detail on the paradox analyses.)
### TABLE 4.1 REPORTED AWARENESS OF INDIVIDUAL PARADOXES

(n=35)

<table>
<thead>
<tr>
<th>PARADOXES</th>
<th>SUBJECTS WHO REPORTED THESE PARADOXES</th>
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<tr>
<td></td>
<td>N</td>
</tr>
<tr>
<td>1. Powerful/powerless</td>
<td>24</td>
</tr>
<tr>
<td>2. Positive regard/caution about nationals</td>
<td>19</td>
</tr>
<tr>
<td>3. Caught between the demands of HQ/nationals</td>
<td>18</td>
</tr>
<tr>
<td>4. Stereotype/individual differences of nationals</td>
<td>27</td>
</tr>
<tr>
<td>5. Relinquish peripheral values/strengthen core values</td>
<td>21</td>
</tr>
<tr>
<td>6. At ease anywhere/belonging nowhere</td>
<td>16</td>
</tr>
<tr>
<td>7. Macro/micro perspective</td>
<td>17</td>
</tr>
<tr>
<td>8. Represent ideal values not found at headquarters</td>
<td>19</td>
</tr>
<tr>
<td>9. Free of/bound by cultural norms</td>
<td>22</td>
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The reaction to the list of paradoxes was very interesting. Several subjects commented that, while they had certainly experienced them, they had never put the paradoxes into words before. For some, it was exciting to see their experiences conceptualized, as is seen in the following quotes.

"They [the paradox list] are interesting. I mean, lots of them if you think about, you don't express. You recognize but maybe never really thought or attempted to verbalize."

"I think they are all very insightful. A list that was obviously prepared by somebody who knows what it is like to be an expatriate. So it is a very substantive list. One that I think should be given to someone who is going overseas for the first time. ...to orient them on how they are going to react to what is going on."

Other subjects received the list with interest but less palpable enthusiasm.

Some subjects noted that the paradoxes or contradictions were only significant when they were first confronted. Once resolved, the paradoxes no longer constituted a problem. One expatriate acknowledged that paradoxical thinking was present in his work but "...I adjusted to it so much that by this time, I did not pay much attention to them [the paradoxes]."

The method for resolving or learning to live with these paradoxes was surprisingly similar. The typical response was, "Once I realized I couldn't change it, I just
accepted it. There was no other alternative." The following quotes include elements of both acceptance and pragmatism. For some expatriates, the first step toward resolution was looking for reasons to explain why the other culture behaved as they did.

"It was just a matter of fact of life once you were out of the country that there are certain things you have to do to make it work."

"You are angry at first, but I think that's when you start to realize that you cannot apply American values and American ethics in assessing a given interchange or relationship in Japan....I am not sure I did [learn to live with that]. I think that you accept it just like you accept any other difficult situation. ...We would love to go back there....but we know what the compromises are"

"Time healed that [feeling torn between U.S. and British reaction to the Libyan bombing]. Time did it because as it turned out to be the right thing to do without question. And I got off the fence. I knew then that [it was] one of those times when your initial gut feeling ended out to be right."

"When you see these dichotomies, you have to say, well, 'what is this? What are the possible reasons? What's your role in this? Is it your role to try to interdict here and just become a medium of change?' And you end up saying, 'Hey, it ain't your problem.... I'm not over here to be a crusader for any cause. I am over here to do a job.'"

"Eventually, I just learned to accept it. You weren't going to change it. I don't think I ever stopped commenting on it, but probably in a less degrading manner."
For expatriates caught between the conflicting demands of headquarters and the local company, the resolution of paradox was described as follows:

"In a way [I learned to live with this]. You pick your battles. You fight for the ones that are very, very important and you don't worry about the ones that aren't."

"Well, certainly, it is very easy to become aware of them [the paradoxes]. Such as the demands of the headquarters on one hand and the nationals on the other....a lot of the things you do are to satisfy what the home office needs, not because it is a requirement in the local country. ...But I think you had to accept that there were certain things [you needed to do for HQ]. And by the same token, there were certain things that we had to do, reporting for example, in a foreign country, that we would not have to do in the U.S."

The last quote indicates an ability to distinguish which were the crucial tasks that had to be accomplished for both HQ and the local office.

Bertrand Russell resolved the famous Liar Paradox (All Cretans are liars; I never tell the truth) by framing it as two statements having different levels of reference that, when kept separate, are not paradoxical (source). Perhaps expatriates learn to take a contingency approach to paradoxes once they develop the cognitive maps that include both the contradictory truths and the cues that tell them which truth is most closely aligned with effectiveness. Paradox may well be "the muddle" before new sets of contingencies are both accepted and clarified.
In the next sections, each of the nine paradoxes will be discussed in detail in the same order they appeared on the instrument used with the subjects. Each section will contain the stated paradox or contradiction, its incidence among the returned expatriates, a representative quote that describes the paradox in the expatriates' own words, and a brief discussion which also includes other passages from the expatriates interviews.

**Powerful/Powerless**

**PARADOX 1. Possessing a great deal of power as a result of your role but downplaying it in order to gain necessary input and cooperation.**

Twenty-four (68.6%) of the respondents reported experiencing this paradox. It was ranked fourth in terms of its significance to the expatriates. The following quote describes the paradox in the words of an expatriate.

"This is important. This is the big time. Underline this part. All of a sudden there was this feeling of power. What I say may affect people's careers and in fact did. There were some people who wound up losing jobs and certainly fell in the esteem level after some of our visits. We had one particularly nasty situation in Germany .... And that's when our president and the chairman of the board were asking for weekly updates and that was a frightening time from the standpoint of the power we were actually wielding right then. Because they were almost hanging on every word and in a way that was frightening and in another way it was a real rush and 'wow!'. People are listening to what we are saying and we can make a
difference here. ... we certainly had the power at times. But I would never portray that power. I never tried to raise my voice ever with anyone. Never tired to threaten anyone. That is not my way of living. It tears me up inside if I have to do that. I am not happy. ... The power, I never felt that kind of power in Cleveland. And not that many people who work here do. Because rarely do we get that kind of input, that high profile kind of job."

Expatriate managers usually wield a great deal of power in their role as a result of various factors: their technical ability, their role as a representative, their hierarchical position, and the degree of autonomy they enjoy. Those who work in cultures characterized by high power distance (Hofstede, 1976) are often treated with a deference not found within our own culture. High power distance is defined as the degree to which a society accepts the fact that power in institutions and organizations is distributed unequally. The United States is below average in this dimension and ranked fifteenth out of the 40 countries that Hofstede studied. For many expatriates, the degree of power they wield abroad is greater than that experienced in their U.S. jobs. And yet, this power is paradoxical because it is not without constraints. The expatriate, more than other managers, is extremely dependent upon subordinates for their knowledge of the local culture. Because the expatriate is less certain of what subordinates of another culture think and do, they feel constrained to be more participative and concerned about gaining commitment. Even in cultures where
the autocratic use of power is acceptable, the same
behavior by an American could be perceived as neo-
colonialistic.

The following quotes reveal how various expatriates
describe this paradox.

"We had changed the operation when I went over. And I had certain guidelines to run the business from my boss. The guy I was replacing had reported to the head of the sales company that was in Europe. And he was a Dutchman, a financial director that kind of ran things. Now in the new organization, I reported to a guy back in the States...but I only reported to him for specific things. The other guy had to report to him on everything. So I came waltzing in and one of the issues that sticks in my mind was that up until that point in time, the branch manager in the manufacturing plant had a limit on what he could spend, a typical Dutch system. He could spend $500 without anyone approving it. And when I first heard that, I said, 'Good God, you can't even buy a dial for that!' He agreed and said it takes 3 months to get everybody's signature and all kinds of justification. In the States, I could spend $45,000 on my own signature as a production manager...So I told him, 'My authority level is $50,000. I am going to give you $25,000. You can buy anything you want to up to that amount without approval as long as it is within the budget. It was like Christmas...And it wasn't 16 hours later that the financial guy said, 'Whoa, by whose authority are you doing this?' I said, 'My own.' He said, 'Well, it's never been done before...I think we need to verify this.' I said, 'Fine, go ahead.' So a little bit later, he said, 'It's okay.' Now that felt - WOW!'...I knew that had to be done at some point in time; it might as well be right at the start...I was willing to cooperate but I wanted to make it damned clear where the boundary was on the power. And there were 2 or 3 little tests like that the first month."

"You just have got to adapt. You know, possessing a great deal of power and downplaying it. You can go overboard with the power but you won't get the work done. People won't work for you. If you don't show some power, they might not work for you either. So you have to get a balance."
This manager's message was: "The bottom-line is effectiveness; power is to be used to do things, not for its own sake." This may seem self-evident but in any period of adjustment or threat, unchecked aggression can undermine one's effectiveness. Expatriates often feel so bewildered and confused, at least initially, that it is tempting to assert one's control over the situation in a manner which could run contrary to the interests of the organization or to the long-term acceptance of the expatriate by the local employees or business partners.

In many instances, work is accomplished through relationships rather than executive fiat. Particularly for technical advisors and expatriates who have informational or regulatory power, such as auditors and scientists, the ability to give and get information usually depends upon the quality of the relationship the expatriate has developed with the host country workers. One expatriate auditor said the most important entry challenge was "to be accepted." After the initial few months, he felt it was no longer important, as "you were part of the group." The reference to the inclusion phase of group development is very clear here.

"And just trying to tiptoe the line [in an audit] with coming up with good hard constructive criticism in terms of what had gone wrong there, while at the same time trying not to make it an assassination of
the person... And if you start stepping on too many toes at one time, you will get stepped on yourself."

Managers express confidence about how to "push" in the U.S. but find themselves unsure of their influence abroad.

"But I guess when you are here [in the States], you feel like you are going to be around here much longer ... If you go and force something a little bit here, you have a better feel that it is going to work with the people all the way down to the bottom of the pyramid. But there, you are not sure. You know a couple of levels of how it might work, but you are never sure of how it might touch the bottom ... or how it might be perceived ... further down in the organization. And here you know it so well, but there you are dealing with different people and cultures. You are a little, you are not real sure, you know intuition wise that it is right and you should go ahead and do it. But you really give them a little bit more of a chance [to participate in the decision]."

Because the crisp, clear lens of one's own culture is absent, more tentativeness and reliance upon others is required.

An understanding of the boundaries of power can result from confronting this paradox. Living abroad taught one respondent "the limits of power." He had learned to distinguish a difference between power in the United States and Great Britain.

"Because here [in the U.S.], everybody is trying to take power. And there, it isn't really the way it works. ... you are given power by the consent of the governed. Because without that, there is no power, because you have no influence over there. You only have influence with people if they let you have influence. Here it is the other way. We are fighting to grab something. And if we think we grab it, that
we got it - well, you ain't got it. You ain't got it until it's given to you."

Barnard (1938) spoke of the same theme; power is granted to superiors by subordinates as long as the superior's requests lie within the subordinate's zone of indifference. It is more difficult for the expatriate to gauge that zone of indifference in another culture; therefore he or she must feel their way more carefully and consult with members of the other culture.

Many expatriates serve in more powerful roles overseas than they do in the US. One group that gets an early taste of the complexities of control are the auditors, who contributed the following quotes.

"When you talk about an inventory shrink like that, all that is coming off of the bottom line ... so we are talking several cents coming off of the earnings per share. ... In some ways, we felt that even though we could identify some people who were clearly out of step with what they should have been doing, we felt that there were other people clearly to blame which we could not indict. We felt that there were people who went well up the ladder, who should have been noticing these things going on. But we couldn't come out and say that type of thing. Really, part of the case is if you complain about everyone, no one is going to listen to you. Pick your fights carefully. And part of it was we could not get hard evidence in a lot of cases. ... So while we had so much power, in another way we were a bit powerless to really make the really big picture change. Yes, we can tell you how to change a system. We can tell you about two people who are completely incompetent. But many problems like this start, are a result of weaknesses at the top and it filters all the way down. That we really couldn't address. Even though I felt bad. ... You change what you can change, and if you can't change it, try not to worry about it. We see people that we can't touch."
In the above example, an empowering experience abroad led to the awareness that people higher up in the hierarchy should have been more vigilant. Yet, an auditor's audience, like any other, chooses when to be attentive and what to hear. The effective use of power in this instance depended upon timing and diplomacy. Once the paradoxical tugs in the organization became clear, political realities determined the path. The paradox of having the power to ferret out wrong-doing versus being powerless to present all the data was cynically clarified by the political contingencies of organizational life.

It appears likely that auditors may have an occupational advantage regarding this paradox because they frequently confront the powerful/powerless dimension in their work.

"It might be one of the things that we [auditors] tend to do better because we are constantly with someone, analyzing what they did and getting them to understand they made a mistake without telling them they did. ... get them to say, 'Oh yeah, that doesn't work.' And that is what you spend your life doing. Because you make the client mad— you are shot in the water."

Like the consultant or technical expert, one must get the client to say, "Aha! That's why things have been out of kilter," rather than bludgeoning them with their errors.

The other group of powerful expatriates that often faces the necessity of downplaying power to obtain
cooperation are the general managers. Unlike young auditors, many of the general managers who go abroad are fairly senior people. The use of power is nothing new to these people but being abroad can provide them with new insights into the effective use of power.

"When it came to buying another business or expanding the businesses where I could have said 'yes, we are going to do this'. I could have made that decision but felt strongly that, not that much different from here, but felt strongly being host, and being nationals, that they had to really push that part of the equation to really make it happen in the long run. And I certainly could have said, 'we have to do this' [but I thought it would better if I let them in on the decision].

"... we had like a business team that ran the business. It was myself, two marketing managers, the plant manager, and the R&D manager. ... 85% of the decisions were made by the group and if they wanted something different than what I wanted and either way made sense, I would normally go with them, with their expertise ... And 15% of the time it would become a deadlock and somebody would have to make a decision. So that was me. ... They knew they could do pretty much what they wanted as long as they got the job done and kept me informed about any big ups and downs."

"You know, I had the opportunity to maybe influence things like ... office location. ... I could have said, 'I want it this way,' but I chose to downplay my authority there."

"I suppose I probably did work towards cooperative spirit, ... teamwork, and probably downplayed that I was managing director and they were managers or representatives and were at lower levels. ... I did not want to come across as exercising great authority or power."
"Oh yes. ... It was a smaller organization. We had clear guidelines, and I gave certain guidelines on some things that I wanted to keep control of. ... I let the people know that. They would come to me and ask for a decision about certain things. That's a nice feeling. You could go overboard with that too. I saw some people in the operation that I think they may have trouble coming back because they may have fallen in love with themselves over there. I tried to downplay that, because you know you have to come back here sometime."

The cautious note here relates to not becoming too attached to being a big fish in a little pond because the adventure will end and the hero has to come home. Expatriates, including some of these subjects, often return to staff positions or headquarters positions that have less autonomy and power.

**Positive Regard/Caution about Locals**

**PARADOX 2.** Generally thinking well of the host country nationals while at the same time being very savvy about being taken advantage of by them. Nineteen of the 35 respondents (54.3%) reported experiencing this paradox. It was ranked seventh in significance by the subjects.

Expatriates who experienced the paradox described it in these terms:

"This is especially the case in China. I generally liked the people but I know they're out to move ahead faster and they will step on people to get their way. The turnover rate, for instance, in Hong Kong of people skipping from job to job is incredible. ...The people of Hong Kong live under the threat of
1997 when the Communists take over...and they are worried about their own freedoms...some of them sense that they have to get ahead in a hurry because the time is running out for them. And so, as an employer, you sometimes felt that you were hiring people who were just abusing you because you were going to pay them a little bit more, but they were only going to stay around long enough until they find the next job to pay them a little bit more."

"It was a learning experience also for seeing how some people will take advantage of you. At a restaurant...the bill was 6,340 pesos. And I gave the lady a 10,000 peso note and, to give me change, the first thing she does is reach into the drawer with the 1 peso coins... She had cheated me out of the equivalent of about 75 cents so she put it back and started again with the 1 peso coins. So I did the subtraction for her...and I told the guy that we'd lived here long enough to know that some people will try to cheat us. Fortunately that only happened once or twice."

The first truth in this paradox, positive regard has been identified as one of the competencies successful managers possess (Boyatzis, 1982). Thinking well of the local culture was also identified as one of the competencies of effective U.S. information agency officials. (McClelland & Dailey, 1972). The other side of this paradox, "being savvy about being taken advantage of by members of the local culture" is more salient for expatriates in cultures with varying attitudes toward honesty. For example, the "prey-predator" description of African cultures contributed by V.S. Naipaul (1980) in A Bend in the River, implies that people in those cultures are either manipulators or victims. The unsuspecting and
relatively wealthy expatriate can also be a target of exploitation by locals.

This paradox was clearly related to country assignment. All seven subjects in Asia experienced this paradox. Only one of five subjects in Latin America reported it.

This is an interesting paradox because it has multiple interpretations which make it difficult to distinguish reality from perception. Being wary about being taken advantage of may reflect ethnocentrism and the suspicion that characterizes lack of adjustment. On the other hand, perhaps the locals really are trying to exploit the expatriate and an unwillingness to perceive this reality is another indication of lack of acculturation. A strong desire to avoid being perceived as "an ugly American" may make it difficult for some to admit any negative feelings toward the other culture. Furthermore, the particular type of role one plays abroad may influence the perception of this paradox. Therefore, with this particular paradox, it is difficult to distinguish between the impact of individual differences and cultural differences.

One long term expatriate, who had worked abroad nearly two decades, reported that it wasn't a concern for him. He clearly stated: "I don't think we ever felt that we were in a position where we were being taken advantage of."
Expatriates who did experience the paradox described it as follows.

"I felt treated well by the people that were there, but there is no question that Luxembourgers take care of Luxembourgers. That's the priority on anything and that is the nature of the society there."

One interesting example related to language ability and being kept at arm's length by the Japanese. The respondent felt that much of the formality in Japanese culture and hierarchy in organizational life was used to maintain detachment. He continued by stating:

"... a simple example of that is being complimented on how good your Japanese is. You know it is terrible. ... that was how they kind of kept you at arm's length. It was almost a principle of trying to take advantage of someone by flattering them."

This may be a cultural difference and not a matter of being used or exploited. Mention of this is not intended to be critical of the Japanese but simply showing how such conduct is perceived by foreigners who still see behavior through their own cultural lens but are trying to fathom why their interaction with the other culture makes them uncomfortable.

This was expressed by another respondent who chose to rephrase the paradox to the following: "... generally thinking well but being very aware of their idiosyncracies. The problems with them."
Recognition of the idiosyncracies fits with what another individual, an auditor working in Latin America, who said the second paradox was "... most significant through the first year. And then I don't think any of them became very significant to me." This is consistent with the notion that a paradox ceases to be a paradox when the situation is clarified. Then contingencies, or cultural idiosyncracies in this case, come into play and one adjusts. This takes some time and is part of acculturation.

Local vendors often hear the accent and alter their bargaining routine because experience has taught them that Americans, and now Japanese, tourists will pay more than locals. This is not as relevant for expatriates who negotiate regularly with locals because trust develops around mutually shared expectations. However, local friends often believe that Americans will be exploited in markets and auctions and therefore want to help by bargaining or bidding for them.

"... our neighbor ... would take us shopping and say, 'Let me bid at the auction. Because they will hear your voice and they will send the price up.' I didn't see it so much as ... taking advantage as ... part of the game. In other words, one man's 'taking advantage' ... is another man's competitive edge."

"... I wondered whether I was being taken advantage of because I did not know the language very well ... but I don't think there was ever any serious incident .... I tended to trust the people a lot. And I think that was repaid. ... I mean they got to know me."
Not knowing the language or culture can heighten distrust because one is unsure of oneself. But as routines make faces familiar, one becomes acculturated and more trusting.

Caught between Headquarters/Host Country Demands

PARADOX 3. Feeling caught between contradictory demands of the headquarters on the one hand and the demands of the host country nationals and the local situation on the other.

This paradox was reported by 51.4% of the subjects and was ranked fifth in significance by them. It relates to the classic definition of role conflict and the difficulty of having two masters. The following quote illustrates how expatriates describe this paradox.

"That [this paradox] was the major problem with the subsidiary. It was something that I was dealing with constantly...supposedly I was representing the headquarters. And the subsidiary was running the business and they could care less what corporate wanted. And it was my role to focus the business that benefitted the corporation. Everything that we did was a paradox."

This is the paradox that appears most frequently in the expatriate literature (Brooke & Remmers, 1970; Koo Yun, 1973; Shetty, 1971; Torbiorn, 1982). It reflects what Perlmutter (in Torbiorn, 1982) calls the "multiple loyalties" of the expatriate and is often framed as role conflict, which seems accurate in the following quotes.
"You are supposed to be part of headquarters but you are sticking up for the locals."

"I don't know whether there was any one specific thing [that is an example of this paradox]. It was more a cultural way of doing things that were [in conflict]. They [HQ] would say, 'Why don't you just see what you can find out. Give them part of the information and then try to get some back from them.' 'Well,' I said, 'they don't deal that way. They are straightforward, honest, just call a spade a spade and that's that.' The company wasn't asking me to do anything deceitful, but it was [different ways of doing things]. ...'This is the way we do it, so just do it.' And they don't do it that way over in Germany."

This is a paradox that many subjects "grew out of" as they gained experience. As they learned the critical factors that could not be overlooked for both headquarters and the local facility and developed a scheme for indexing priorities, the significance of this paradox declined. However, some companies made it extremely difficult for their expatriates to live with this paradox because of policies that reflected their own lack of sensitivity and understanding about the local setting. This is an example of the organizational constraints that affect expatriates and seldom appear in the effectiveness literature (Newman, Bhatt, Gutteridge, 1976).

Most of the expatriates in this study stated that their home offices had supported them or at least stayed out of their way and allowed them to be productive. However, a few subjects did complain about their headquarters. The lack of support they identified related
to either the conflicting demands discussed in this section or the "out of sight, out of mind" syndrome that became more figural upon their return. One of the more experienced expatriates avoided both problems by maintaining close relationships with headquarters.

"You can only do so much by telex and reports and an occasional phone call. On some issues you have to sit down across a table and talk them through. You can't do that efficiently when you are 4,000 miles apart....tensions develop over 4-5 months...[I negotiated] for a trip back to the States every 3-4 months for a week..to have some time with the GM here, some time with manufacturing, and R&D and marketing here...At one point, a couple of years later we tried to extend it to 6 months, [but] that was too long. Because I could tell the frictions building up among my own people with the U.S. There would be good communication for awhile and then gradually slip apart after 3-4 months and you start getting nasty telexes back and forth...So whenever I went to the States, I said, 'Okay, what are the problems?'...and I'd dispense all of this information to my group [in Holland]. But I don't think it was so much a cultural problem as just the physical separation of people that have to work together."

Stereotype/Individual Difference of Nationals

PARADOX 4. Seeing as valid the general stereotype about the culture you lived in but also realizing that many host country nationals do not fit that stereotype.

This was the most commonly reported paradox. 77% of the subjects experienced this paradox and they ranked it sixth in terms of significance to them. However, there were few references to it in the interviews which explains
the paucity of quotes in this section. The most representative quote is shown below.

"Well, I think you have to realize that you are going to have people that don't fit that stereotype mode, no different from [the States], right?"

The paradox refers to the ability to see beyond cultural stereotypes to the individual differences that abound within cultures. In fact there is more variability in personality than in the social customs of any society (Feshback & Weiner, 1982). However, not everyone perceives the diversity within another cultural group. This can be attributed to several factors. First, it may be due to the individual's inability to go beyond stereotyping and perceive complexity, which Loevinger (1970) claims is a function of higher ego development. Kanter (1977) describes the role encapsulation that occurs with tokens. When there are small numbers of a minority group, they are perceived to be similar and are stereotyped. When the numbers are larger, the diversity among minority members is more likely to be appreciated. Expatriates are usually the token abroad but sometimes their power status and the penchant of some for banding together with other Americans allows them to perceive the locals in the role of tokens. Stereotyping may be one of the phases of acculturation through which expatriates pass. Detweiler (1975) found that well-adjusted expatriates make less rigid evaluations
to explain the behavior of others and are more likely to modify their impressions in the light of new data. With time and more exposure, it may be easier to see the individual differences, as the following quote indicates.

"That [paradox 4] is a good one. There is a stereotype about a typical South African being a beer drinking individual who cares nothing about the blacks and takes advantage of the blacks. That's not true at all."

"[People may react differently to Japan] based on how long there were there. Someone who is there for 6 months probably left Japan feeling exhilarated but I think with a pathetically superficial knowledge of what things were really like. Someone who was there for 3 years probably left feeling perhaps even a little bit cheated, because they had begun to develop an awareness of what was going on...Whereas someone who has been there for 6 years has been there long enough to overcome the cynicism I think inevitably results from an awareness of what the Japanese are really like. But at the same time, you've kind of graduated from regarding your experience from being an experience with a foreign culture in a foreign people; to being an experience involving a very specific job with a very specific group of people in a neighborhood, in a community. And the cultural aspects of it, the foreign aspects of it begin to break down and it becomes much more personal."

In the following instance, the expatriate experienced the paradox but in regards to stereotypes about Americans.

"The values that I demonstrated or hoped to show [in England] were shared by the people I had a lot of dealing with in Chicago and my friends back here in Cleveland. But in the background, I knew that many of the stereotypes that were said about Americans were valid. That Joe Steelworker sitting in his livingroom in Gary, Indiana didn't give a damn about what was happening in England. And when he picked up a newspaper, all he read was the sports page and the funnies. And I became very sensitive to that...a sort of contradiction. I'd want to tell Brits that, 'Hey listen, Americans are different from that.'"
at the same time, I was realizing for myself that many of these stereotypes were true."

For many expatriates, working abroad is their first experience of being a minority and being stereotyped. That experience should make them more sensitive to this phenomenon when they are perceiving others.

Relinquish / Strengthen Values

PARADOX 5. Giving up some of your American values in order to be accepted or successful in the other culture while at the same time finding some of your core American values becoming even stronger as a result of exposure to another culture.

Twenty-one of the 35 respondents (60%) reported experiencing this paradox and they ranked it third in terms of its significance to them. It was easier for the subjects to recognize the values that became stronger than to identify the ones they had relinquished. Much of the sojourn literature refers to the assimilation of the other culture's values as part of the acculturation process (Berry, 1983). However, there is little mention of the fact that one's own values also become stronger during the overseas experience.

"Giving up some of your American values— you find that you change in subtle ways—the way you live, the way you act. But at the same time, reinforcing a lot of the values that we have here—the freedom of action, the creativity, the aggressiveness in a good
sense, that you don't see in a lot of European nationalities."

"It was a tremendous experience, for your children and so forth. Our kids became very patriotic, which they did not have that in a bone in their body. Because we lived through the bombing of Libya and the Falklands, the Malvenas conflict, where there was a lot of anti-American sentiment even in school. They became a real minority and so they learned a lot too in that time frame. Excellent learning experience."

The concept of figure/ground is elicited by this paradox. People are usually introduced to their own culture in the act of confronting another. One learns what it means to be an American by rubbing up against other nationalities. Thus, the different values of the host culture force our own values out of our subconscious and make them figural. Peripheral values, those not essential to our sense of identity, are re-examined and jettisoned at this point in the quest for acceptance and/or effectiveness. This confirms Lee and Larwood's (1983) study of highly satisfied American managers who adopted some Korean values while retaining American values. They hypothesized that, in order to be successful, these expatriates sought an accommodation with the Korean values that did not alienate them from crucial American values. However, their research design did not allow them to see that, paradoxically, core values become even stronger as a result of the contrast and exposure to other cultural values. The core values the subjects identified were
usually patriotism, capitalism and religion. The following quotes describe how they became strengthened.

"My belief in individual freedom [became stronger]. I think I became much more of a patriot after being over there. I see the advantages to our ... constitutional system. That's the biggest one...I think I have a new respect, a different feeling about religion too....So I think my religious values have become stronger after being there [Belgium], and seeing the coldness of things."

"I can remember being very, very patriotic when the news would come on and they would show the White House with the flag....[I was more low key in some ways] but had a deeper sense of loyalty to the country."

"Now I was going to talk about a personal paradox. And that is, ... becoming more aware of your inherent patriotism, which I think most people take for granted until they live overseas. ... my wife and I graduated from college in the early 1970's, which means we participated in the strike, we protested vigorously against the war in Vietnam, the bombing in Cambodia, the draft. ... And so I never thought of myself as ... having strongly patriotic inclinations, but we found that when you go live in a foreign country, I found that I became almost a sloppily emotional patriot— the type of person who would break down in tears when he heard the Star Spangled Banner, who resented any criticism of the United States. And these were aspects of my character that I never would have anticipated before going to Japan. It is interesting."

There are several possible explanations for this blossoming of patriotism. First, expatriates are sometimes placed in the novel position of a minority and forced to defend American foreign policy and materialism. Under threat, one's patriotism may rise to the occasion. Second, another explanation is that adjustment to another culture is so stressful that adopting a cynical view about one's own
country may be the last straw. For some, national pride could fulfill the function of an organizing principle that helps maintain the expatriate's sense of identity. This may be supported by May's (1970) statement that the values that are important to one's personality, i.e., core values, are largely a product of one's culture; therefore, extensive changes in cultural condition can produce anxiety. One way to alleviate this anxiety is by reinforcing these core values. There are well-documented instances of expatriates "going native" (Gonzalez, 1967; Heenan, 1970, Littlewood, 1985). This involves jettisoning even core cultural values to assume those of the other culture. Only one of the subjects in this study came close to "going native;" his expectations about work were not met and he was left out of the American social life, reportedly because he was single; therefore, he spent all his time with locals or third country expatriates. He was the only subject to request an early return for his own sake and has since left his company.

The rest of the subjects seem too career conscious to "go native." Business people who do "go native" are probably more likely to stay abroad or resign so they would not appear in a sample selected as this one was. Also the strengthening of one's core values also prevents one from "going native."
Third, some expatriates become more patriotic as a result of having their consciousness raised about the advantages of their own country, such as free press, free speech, free markets, freedom of religion, a justice system that treats people as innocent until proven guilty, and so forth.

Finally, there is an idealization of one's culture that occurs for many expatriates during their overseas experience. Triandis (1967) discovered that Americans in Greece thought more highly of Americans than did Americans in Illinois. Several expatriates mentioned this idealization in their interviews.

"Because I am not there [in the U.S.], it looks so nice. So you say in conversation how it is. And you tell the great things. I guess it is like any experience in life...the unpleasantries fade away after awhile, so the cream rises to the top and you remember those great things about the country. But yes, it is clear in my mind that if I went back to England, I would never give up my [American] passport."

Paradoxically, Torbiorn (1982) claims that as time passes expatriates come to identify themselves increasingly with the prevalent attitudes of the host country. The host country's conception of their role assumes greater importance than that of their parent company or native culture. This process is illustrated in the modifications some expatriates made in their behavior.
"You tend to be more reserved in what you say. Probably give up some informality. Americans tend to be very informal at home. And in Europe, you may be a little more formal even going out to the market. Everybody is dressed a lot better than they are here. And you tend to say, after a while, 'I don't want to stand out ...' You can pick out an American four miles down the street. ... You find you start picking parts of different cultures that you like and saying, 'Gee, I wish we could have all of these together.'"

"[What values did I give up?] I never wanted to know something about French wines, but I felt that I ought to know something about them [in Europe]. Becoming stern and tough because this is what the German likes. I even could tell I was imitating the French guys. Noticing waving my hands because they did it. I'll do it if that's what they want. I don't normally wave my hands, but when our French salesman would come up, he would get all excited and I would [do that] because I felt that he liked it. And it would make the conversation go better."

Although not necessarily a value, clothing is one of the first changes that many expatriates make.

"First thing you have to give up is polyester clothes. The Europeans spot Americans a mile a way by their baggy polyester clothes. See, in Europe, clothes is a lot higher on the agenda than in America. In other words, the Europeans, they like to wear wool with creases in them that you can cut your finger on and they look good. So you can spot an American a mile away. So wardrobe is the biggest thing."

"I suppose outwardly there is the obvious [way I tried to change my behavior to fit in] as far as dress goes. I mean the uniform over here is the white button-down shirt with the red tie....Right away in Britain, I just didn't want to be labeled like that. I didn't want to stick out like that. So I went out...and bought some suits. [WHY?] I can't find the word for it to save my life but there is anonymity that really appeals to me. I suppose I could find it in New York where it is not as conformist as Cleveland ...but there is something very appealing to me not to have a label on."
"Not wanting to stand out" is a common theme in the interviews. There seem to be several motives for changing one's behavior. One is to be more effective in terms of work; another is to become acculturated so that members of the other culture will accept you and the third is to avoid standing out.

Another aspect is promoting company values. Given their role as representatives of their companies, many expatriates attempt to inform overseas affiliates what the headquarters would like to see as values. A strong corporate culture is one method of maintaining control in a far-flung multinational. Therefore, many expatriates are paid to promote their company's values implicitly or explicitly.

"... you are constantly pushing the values of your company that you have here. ... you are putting the values on someone else that maybe don't have the same kind of company values. And that's very typical because most employees in Europe are new people. They don't even know about the company culture ... but it is hard for them. Because they are dealing with the company culture on top of American culture."

In a business sense, the expatriate is clearly there to promote the headquarters' values. Even though a certain degree of acculturation is recommended, adherence to the company's values is essential if the expatriate is to retain the trust of the senior management at headquarters.
Several respondents thought they did not relinquish American values as much as they acquired the values of the other culture.

"I am not sure I gave up a value as [that I] probably gained some qualities, or acquired some qualities, like listening. I tend to think I am a much better listener now than I was."

"I remember ... I tried to adapt to their ways so that I would feel more a part or have some success with them. I don't know whether it is really giving up American values. I guess giving up American values means I wasn't as wasteful. I went along and ... 'Okay, I am going to crush cans and I am going to recycle bottles.' I mean I could have just thrown them in the trash. ... "

In response to asking what he found becoming stronger, he responded as follows.

"My realization of how wasteful we were in America and that there has got to be somewhere, sometime where that trend has got to stop. ... And if I can do it in some small way by not wasting something, then that's what I am going to do."

One respondent felt it wasn't so much a question of giving up values but rather being open to other points of view.

"... you realize that ... there was another way of looking at the United States. And I think that at that point you became receptive to criticism as long as it was presented in a positive, constructive way, which in Japan, it almost always was. The Japanese bend over backwards not to offend. But at the same time, they are not patsies. I mean, they do have opinions about things which they do try to express in as constructive and inoffensive a manner as possible. But I think you have to be prepared to accept criticism of your country by an outsider. As a matter of fact, when I first arrived I wouldn't accept criticism from an outsider. And once again, I think
that is probably part of the arrogance for which Americans are so famous overseas."

Even though this paradox was reported by 60% of the subjects, there were some expatriates who rejected it and stated quite emphatically that they did not give up any American values. Some of this group had indeed modified their behavior to gain acceptance, but the idea of relinquishing values was abhorrent to them.

"I did feel that some of my American values became stronger as I was over there. However, I never gave any of those values up just to be accepted. I may say to somebody what I didn't think was right to be accepted. I may say to somebody what I didn't think was right about what Americans were doing, or how America might be in a certain area. But I certainly wouldn't say that I subordinated some of my values in talking to people ... I just don't think that is the right way to word it."

"I don't remember giving up any American values ... However, I did find that some of my own became stronger due to exposure to the other culture. ... In one way what you do learn to see is their side, especially in ... controversial political arenas. ... you understand where they come from. And that is one real learning experience that you all of a sudden realize is that we here do have things distorted from time to time on a national scale. You have to remember that most people in Europe ... think world politics. Most people here ... can't tell you where exactly Guatemala is and can't tell you where Luxemburg is ... They are not even sure what continent Egypt is on. ... That is not the case in Europe. So I would never give up any of the American values but certainly this is stronger as a result of exposure. I became [more patriotic] because I understood their side better than I would have when I was here. I understand what they are thinking now when we make some horrible mistakes, press wise and publicity wise."

The above respondent gave the bombing of Libya as an example of his surprise that so many of his respected and
trusted European colleagues were violently opposed to the American attack. Although he saw the attack as correct, he came to better understand how they formed their viewpoints.

Perhaps this paradox could be reworded in two ways; one would be to replace "American values" with "cultural ideas or behaviors". The other modification would state that expatriates take on the values of other cultures at the same time that their core values become even stronger.

At Ease Anywhere/Belonging Nowhere

"I have become a queer mixture of the east and the west, out of place everywhere, at home nowhere...I am a stranger and alien in the west. I cannot be of it. But in my own country also, sometimes, I have an exile's feeling."

Nehru


Sixteen of the 35 subjects (45.7%) reported experiencing this paradox and ranked it second in significance.

"I had a very hard time understanding the average American point of view on that topic [Vietnam], after having looked at it from a couple of different directions....It is not that we were bad guys and those little guys were good guys. There were no good guys over there....It was naive to be there in the first place...and the Watergate thing too....I guess we were looking at it from a distance, from a more detached point of view than the person who was living here the whole time. So I think that experiences like
that show you that 'Yes, I am here, I can understand it,... I can discuss it, but I don't belong as such only in this particular environment. When we go to France, we can chat with some of the old waiters that I have known from the cafes for 20 years, and go to the club. And I can live in France for 300 years and still not be French. I am very at home there, but I wouldn't want to spend the rest of my life in France. And if someone had told me in France, at the best of times, that I had to make the choice today of staying in France forever or leaving, it would be no question. 'I am going, I am out of here.'" (after 17 years abroad)

This paradox has the flavor of "you can't go home again." It seems likely that expatriates who had spent many years abroad could feel like strangers in their own country because their earlier social contacts have been disrupted (Torbjorn, 1982). Torbjorn found that 16% of his subjects returned abroad within a short 4 year period citing discontent with conditions in Sweden as the reason. However, even expatriates who spent only two years abroad experienced this paradox.

In addition to living conditions, the question of marginality is an apt one with expatriates. Some may self select to go abroad because they are already marginal or they may become marginalized as a result of the experience. The increased cognitive complexity that results from living abroad makes it difficult to fit oneself snugly back into one's own culture. This phenomenon is more clearly explained in a later section in this chapter, "The Return."
The following quotes portray this paradox in the subjects' own words.

"We found ourselves when we traveled feeling very comfortable. But coming home we have had problems settling back in. And not really being sure if we belong here, because we don't know if we do belong or don't belong." (after a 2 year assignment)

"I came back to the States on a business trip and was returning to London.... As the plane approached, I felt I was coming home. ... it really struck me in a powerful feeling of being 'home again.' ... I remember envisioning a montage of different elements of my existence or life style that were prominent ... - things about the job, things that seemed important - family, friends, all these things floating around like an amoeba....As a result I felt more satisfied. I thought I would make the most of my time there. I took lots of good vacation time and traveled all over." (after 5 1/2 years abroad)

"[I remember experiencing this paradox] when we came back to Cleveland the first time and realized that we were not really in the mainstream of what people were thinking about and doing...We were native Clevelanders and we lived there and worked there and talked like them but weren't necessarily feeling like them, part of the community....We spent a weekend with a couple that were among our best friends...and felt out of it, I guess, because we had evolved in different ways. I am not being critical of what they did and they weren't critical of what we did, but it just wasn't meshed." (after 17 years abroad)

A sense of belonging abroad depends a great deal on the host culture as suggested by Mendenhall and Oddou's (1985) review of the expatriate adjustment literature. Greater cultural barriers were acknowledged by sojourners to Africa and the Far and Middle East (Mendenhall & Oddou, 1985; Tucker & Schiller, 1975). Torbiorn (1982) also found it is easier to feel at home in similar cultures.
For Americans living in Europe or Latin America, cultural differences are not irrelevant but there is enough in common that one can feel comfortable. However, in many Asian or African countries, one often has the sensation of being on a much different wave length. One such country is Japan. When asked if it was easy for Americans to be accepted by the Japanese, the interviewee said:

"No. As a matter of fact, we found it impossible. I say that we felt at home in Tokyo, that we had close Japanese friends, but there was always this kind of nagging feeling that we didn't belong. We longed for our own country."

One wants to belong, to identify local trees by name, to know the local history, watch the neighbor's children grow up, and go to a place "where everybody knows your name," as sung in the theme song for "Cheers," the TV series. Expatriates can develop surrogates in clubs, PTAs, local churches, but not being part of the larger community is uncomfortable for some.

A common concern with expatriates is having to travel so much that they feel rootless.

"Told you about that three month project we had in Germany. Stayed in the same hotel almost constantly for the three months. And at the end of the three months I had a week back in the United States. ... I stayed with my parents. And I felt very much like, 'Gee, this isn't home even though I was back in the States.' And then I went back and spent a week in my flat in London and that didn't feel like home either. And then I went back to Germany, back to the same hotel and that almost felt more like home. ... Yes, at that point, I was really confused. I think, 'Where
is home? And when do I feel that I am home finally?' I had not experienced anything like that before."

For others, the place they belonged was clearly the U.S. One stated: "Feeling at ease anywhere but belonging nowhere - No, ... I belong here."

Feeling at home requires significant relationships.

One interviewee reported the following incident:

"I'd moved around a lot as a kid, so I may be more adaptable than most. I did get a social circle over there. I went to a German class ... I met a woman in the hall and we got to chatting. We discovered we were neighbors.... One night after class, I drove home. I saw a face. It was very dark and I couldn't make much out. As an American, I thought, 'I'm going to get robbed.' Two years later I wouldn't have thought that. It was this woman and she invited me over and we had a nice relationship. Then she fell for her cousin and we didn't see each other much. I don't know why I got off on that."

It's interesting to note that feelings about security changed. Surely feeling you're not going to be mugged makes it easier to feel at home. Also, having a relationship is crucial to feeling at home. What is home if not intimacy in relationships? I suspect that's why he "got off on that."

There were some objections to this paradox. Some people didn't like to think of themselves as belonging nowhere; they saw themselves as belonging everywhere.

The Macro/Micro Perspective
PARADOX 7. Becoming more and more "world-minded" as a result of exposure to different values and conflicting loyalties, but becoming more idiosyncratic as to how you put together your own value system and view on life.

This paradox was reported by 48.6% of the subjects and was ranked first in significance and yet, there were very few passages in the interviews that described their experience of this paradox. This was the only paradox that occasionally had to be explained to the subjects, which supports the idea that it is not worded as clearly as it should be. The following quote describes this paradox in the expatriate's own words.

"[I have changed as a result of the experience in that] I am more understanding of a wide range of people. Definitely more interested in experiencing different situations and cultures than I was when I went, although that is what drove me to want to do it. More of a need to go and do things other than just staying here in Cleveland and being content.... And of course, [I am] much more independent than I was before.... And probably that idiosyncratic question, I think I have changed in that way. I have sort of created somebody. Not intentionally, I don't think, but I think that is what has happened."

This sounds like Becker's description of the person who throws off his or her "cultural lendings", the borrowed self, and finds a more authentic self. It also exemplifies Campbell's idea that the modern-day hero is the person who finds himself or herself and is not content to imitate others. Perhaps this is why this paradox is so significant,
even though it is hard for the expatriates to describe. It may represent a "coming of age" and a liberation from a prior conception of both the self and the world. It may also refer to the collection of other cultural values that expatriates like. Long-term expatriates speak of taking on pieces of other cultures that they find lacking in their own culture. An example is the person who forms a unique religion that incorporates "the best parts" of Christianity, Islam, and Judaism.

For those who did not agree with the entire statement, many commented that they did feel they had become more world-minded. However, they were not sure they were putting together their value systems and philosophical outlook on life in an individualistic fashion.

Representation of Ideal/Real Values

PARADOX 8. Trying to represent your company as best as you can in order to succeed but also realizing that the "ideal" values you act out abroad may not exist back at Headquarters.

Nineteen (54.3%) of the subjects reported experiencing this paradox and ranked it 9th, or last, in terms of its significance to them.

"I think that you like every customer to feel as though he or she is number one on your list....but certainly there are customers who are higher in the
pecking order. We are part-owned by American [companies] ...and they are paying to be that number one priority. Therefore, all of the European customers that I had ...abroad come somewhere in the second order."

This paradox relates to both the idealization discussed previously and to the representative role expatriates are often forced to assume. Torbiorn (1982) refers to this as the "ambassadorial feeling" which relates in part to solidarity with one's national identity. He also acknowledged that the sojourner may feel this behavior is expected of him or her. Thus, its genesis may be either the expatriate's or the host culture's conception of the expatriate role. Torbiorn asked his female respondents, the spouses of expatriates, to respond to the following questions: "You feel you are an ambassador for Sweden" and "However critical you may be about certain conditions in Sweden, you defend them when they are discussed abroad." Their responses to these questions were moderately correlated ($r=.32$), and two-thirds of the women agreed fully or partially with the statements. Thus, this phenomenon can occur with both one's company and one's country. It is the curse, and sometimes the pleasure, of the boundary spanner.

"That [being asked why your country did this and that] happens all the time. You never remember the bad things [about your country]....I guess you do have a tendency ...that probably happens more or less in your first year or two. But I think after you are there for awhile, and you become comfortable with the
people, you tell it like it is. I think that was certainly my case.... If I look back now, I probably didn't think about it too much but ...I probably was more guarded about the negative side in my first year than I was later. And I think that has to do with learning to become appreciative of some of these things [in their culture] that you were not accustomed to."

This subject's observations confirm Torbiorn's (1982) findings that the ambassadorial feeling appears to be stronger during the culture shock phase and diminishes toward the end of the first year. His theory of adjustment contends that expatriates feel compelled to defend their native country and its frame of reference when it is most threatened by exposure to the other culture. Representing one's country is thus interpreted as a rejection of the other culture.

However, Torbiorn also discovered that the ambassadorial feeling increases over time to form a U-shaped curve. He hypothesizes that the expatriate can now take a more relaxed attitude toward the role and that the native country is now seen from a different perspective, and perhaps even the perspective of the mass media. Pool (1965) found that American businessmen who were abroad for many years saw themselves less exclusively as representatives of their company over time and more as representatives of their country.

Applying the metaphor of the hero's adventure provides us with another explanation for this phenomenon. Campbell
(1968) stated that loyalty is one of the most important characteristics of the mythical heroes; they did not forget their quest even if they were momentarily distracted. Many expatriates see themselves as part of a tradition of expatriates—they share a form of kinship with them and consider the effect their behavior may have on those who follow them. Heroes also have a need to identify with something larger than themselves. Representing their country or company fulfills that need and allows them to enact heroism.

Free/not Free of Cultural Norms

PARADOX 9. Being freed from many of your own cultural rules and even from some of the host culture's norms but not being free at all from certain host country customs which you must observe in order to be effective.

Twenty-two of the subjects (62.9%) experienced this paradox. It was ranked eighth in significance. Although its incidence is relatively high, there were few quotes describing this paradox. From my own experience, expatriates usually discuss this paradox when they speak about other Americans or expatriates who have not yet learned to distinguish what they can and cannot do in a new culture. Going abroad may feel like "slipping one's leash" and having no social norms to measure up to or
observe. As one expatriate describes his reason for wanting
to return abroad, "to be a little more independent of all
the social forces that tend to crowd around you once you
live someplace for a period of time." Cultures allow
strangers a certain latitude that is not proffered to their
own members *(Cateora, 1983)*. However, if one fails to
discern where the boundaries of that freedom end, censure
or isolation results. For example, American managers in
West Africa may not have to entertain business contacts,
but they would be expected to attend all their employees'
baptisms, weddings, and funerals. Every culture has some
rules that are absolutes, Cateora's (1983) "cultural
imperatives". The expatriates who see only freedom will
invariably transgress important cultural norms.

**Paradoxes Identified by the Subjects**

Before the subjects were shown this list of paradoxes,
they were asked if they could remember any paradoxes or
contradictions they experienced abroad. The majority of
them did not, even though they subsequently acknowledged
experiencing many of those on the list. This appears to be
a topic that must be "jump-started" for most people. The
additional paradoxes that were identified are presented
below:

- the discovery that all people are both similar because
they are human and dissimilar due to cultural differences
- the unfailingly courteous but yet reserved, withdrawn manner of the British
- being one's self/playing a responsible role
- the positives/negatives of the expatriate life
- "my view"/"their view" on politics and economics
- the infidelity/family responsibility and devotion of Mexican husbands

The first one on this list, the similarity/dissimilarity of all peoples, was mentioned by more than one expatriate. It reflects Kluckhohn's famous statement:

"All men are like other men.
All men are like some other men.
All men are like no other men."

These findings indicate that expatriates do indeed experience paradoxes, in varying forms and to varying degrees. Coming to terms with these paradoxes and accepting them as facts of life constitutes one of the obstacles in the expatriate's hero's journey. Furthermore, dealing with paradox and the other aspects of this adventure causes the expatriate to be transformed, a process that is described in the following section.
2.b. The Ultimate Boon - The Transformation

The second stage of the initiation phase is that of the ultimate boon. It refers to the transformation that Campbell describes in the following quote, "By traveling outward, we come to the center of our own existence."

"Anyone who lives abroad has to change. They have to be more open to the different situations and therefore that makes them a more open person. I think you tend to be a little less impulsive and a little more willing to sit and listen to the other side first rather than just making a snap decision, saying we have always done it this way." (returned expatriate)

"I think the most important lessons [learned abroad] were personal ones. Patience. I would say I have a ...broader perspective on life. I've got a better understanding of the world and how it operates. I think I have grown as a person as a result of my living overseas. Things like the theatre and classical music and walks in the park and those sorts of things which growing up, I really did not have that much exposure to. Spending time in London really made me aware of these things and I've had a chance to experience them. As a result, I am a more mature person." (returned expatriate)

The transformation of the hero is the basic theme of the initiation phase of myths. It is also a major theme of this dissertation because my argument is based upon the hypothesis that expatriates change so significantly abroad that they have difficulty with reentry. This section begins with a brief description of Campbell's definition of transformation and the incidence of change among the expatriates studied. A more in-depth discussion of
transformation in the hero's adventure and its application to expatriates follows. The section ends with the thematic analysis of the nature of the transformation reported by the subjects.

According to Campbell (1968), mythical transformation results from overcoming obstacles with the help of a magical friend. The transformation itself symbolizes a death and a rebirth. The death represents the annihilation of the ego and a "putting aside" of a former life and way of looking at the world.

All but one of the subjects (97.1%) reported that they had changed abroad. The one exception was an older man who had spent many years traveling abroad prior to his assignment and was preoccupied with family problems during it.

"In my role in the overseas assignment doing a job and living there didn't alter too much my basic person, my basic style; my basic attitudes were not impacted so much. It was more the influence of having to deal with the personal matters."

According to Campbell, there are several important aspects to mythical transformation. Those which are most helpful to this study are the move from dependence to independence, the hero's sacrifices and acceptance of duality, and his or her discovery of a universal power within. These factors are discussed in the following paragraphs.
As stated previously, the move from dependence to independence is based upon the annihilation of the ego and leaving behind a former way of looking at the world, a former consciousness. This transformation is the basis of many initiation rites found throughout the world. Most cultures use such rites to mark formally the end of childhood (dependence) and the beginning of adulthood (independence).

Like the mythical hero, the expatriate sacrifices himself or herself for something — accomplishing a difficult task for the company or striving to be effective and accepted in another culture. The sacrifice may also relate to performing the representative role demanded of expatriates. Furthermore, some expatriates sacrifice their values, normal ways of behavior and perception, their extended family, and their comfort in certain instances. These sacrifices represent the annihilation of ego that Campbell claims is essential for a heroic transformation in the following passages.

"Tyrants are the hoarders of general benefit — avid for greedy rights of "my and mine". The inflated ego of the tyrant is a curse to himself and his world. But the hero is the man of self-achieved submission" (1968, p. 15)

"He must put aside his pride, his virtue, beauty, and life, and bow or submit to the absolutely intolerable. Then he finds that he and his opposite are not of different species, but one flesh... the devotee is expected to contemplate the two [good and evil] with
equanimity. Through this exercise his spirit is purged of its infantile, inappropriate sentimentalities and resentments, and his mind opened to the inscrutable presence which exists, ...the law and nature of being" (1968, p.108-114)

In addition to the hero's obligatory self-sacrifice and submission, the latter passage contains the acknowledgement of duality. Many mythical heroes went "beyond the last terrors of ignorance" to transcend pairs of opposites, like "good and evil" and "eternity and time." Mythical heroes, like expatriates, learned to transcend paradox.

But before expatriates achieve that level, they often experience a sense of dependency. They do not know how to be reinforced for their social behavior, they do not understand the rules of the new culture, and they have left behind many of their cultural and personal anchors. Metaphorically speaking, the expatriate experience is a forced return to childhood. This is why cultural mentors can be equated with the supernatural help of a magical friend; they perform the role of god-like parents. The following quote illustrates this feeling of dependence.

"The first period of really serious struggling and being totally dependent took from the middle of June until about the end of the summer and then we were at least showing some signs of being independent. From there till the end of the year, I was beginning to make more customer contact...sometimes in English, sometimes in Spanish so I was a little more broad-based for the functions of the company. And at the same time, I was able to do more in my private life in
terms of satisfying creature needs, hiring a maid, this sort of thing."

Once the code of the new culture has been broken, with or without the help of a cultural mentor, the expatriate can function independently. There is a strong sense of pride in both adapting and mastering a different culture. It serves as a rite of passage; many expatriates can pinpoint the specific time they began to feel comfortable in the culture or effective on the job. Those who cannot pinpoint the exact time still raise the issue of their own accord because of its significance.

Our society has fewer rites of passage than do traditional societies. The lack of initiation rites and opportunities to test oneself explain much of the importance of the expatriate experience. Most of one's own culture is familiar and easily managed. Furthermore, modern society is no longer a game against nature, or even a very stimulating game against man for many people within large organizations (Bell, 1976). People are seldom called upon to use certain parts of themselves or to rise to the occasion in the way that is demanded by the expatriate experience. The sheer novelty and uncertainty of entering another culture can throw expatriates off balance. As a result, they become aware of hidden resources and skills that were not needed within their own culture but are essential for coping abroad. This relates to the powers
that were released or discovered within the mythical heroes. They learned that the power or ability to accomplish something lay within them all the time — Luke Skywalker's "force" and Dorothy's ability to leave the Land of Oz whenever she wanted. As Campbell states,

"The perilous journey is not labor of attainment but reattainment, not discovery but rediscovery...godly powers were within the heart of the hero all the time...the hero is symbolical of that divine creative and redemptive image which is hidden within us all, only waiting to be known and rendered into life" (1968, p. 39).

In sum, the cross-cultural context makes greater demands upon people. By rising to the occasion, they sometimes bump into parts of themselves they did not know existed. This confirms Szanton's (in Textor, 1966) belief that in the effort to understand another culture, one comes to know oneself.

In addition to a different level of consciousness about themselves, expatriates can acquire a new way of perceiving the world. Because the balance of their lives is disrupted and their normal routines left at home, expatriates are usually more open to new experiences and new perceptions. In our society, we become calloused by predictability, routine, and even materialism. If we are not looking for novelty at home, we seldom find it. Once that frame is broken, people are freed to look at their surroundings with a more child-like appreciation. Novelty
and learning were major themes of the subjects' interviews and two of the factors they missed most upon their repatriation. Making sense of different cultures and their beliefs was a challenge. In the process, the expatriates' own views changed and they acquired a different consciousness, a bicultural perspective. This is the change in consciousness most frequently described by expatriates - the acquisition of a more cognitively complex perspective that also includes an appreciation of paradox. Becoming a citizen of the world, acknowledging the similarities and differences among cultures, and learning to see one's own culture through the eyes of another are other examples of their new consciousness.

In myth, the consciousness is transformed by exposure to both trials or illuminating revelations. For expatriates, the consciousness is transformed by exposure to cultural differences, trials, and paradox, sometimes with the help of a magical friend who provides explanations. American business people live in an objective and empirical world where reality is measured in terms of profit and goal attainment. The expatriate often finds that the world overseas is not operationalized in the same way. Bereft of an empirical reality, other forces come into play - the unconscious processes that are normally overshadowed in American culture. Campbell was a strong
advocate of becoming more attuned to the unconscious and its power.

"The story of Jonah ... is an example of a mythic theme that is practically universal, of the hero going into a fish's belly and ultimately coming out again, transformed. Psychologically, the whale represents the power of life locked in the unconscious. Metaphorically, water is the unconscious, and the creature in the water is the life or energy of the unconscious, which has overwhelmed the conscious personality and must be disempowered, overcome and controlled... Consciousness thinks it's running the shop. But it's a secondary organ of a total human being, and it must not put itself in control." (Campbell, 1988, p.146)

The basic theme of the hero's adventure is a separation from the world, a penetration to some source of power, and a life-enhancing return. The source of power for the expatriate is a bicultural perspective, increased self-awareness, and the knowledge that he or she had the inner resources to master a difficult situation. Penetrating to that power, the crux of mythical transformation, involves a death and a rebirth. In the case of the expatriates, death represents leaving behind both their dependency and a former way of thinking and perceiving. The interviews tell a story of both "letting go" and "taking on" of many factors that are described in detail in a later section. The next section describes the ways in which the expatriates changed.
Types of Transformations

As stated previously, all but one subject responded positively to the first part of the following question, "Did you feel you changed as a result of working abroad? And if so, how?". There were some subjects who felt they had changed but could not specify how. The answers of the other subjects to the second part of that question can be categorized as follows: (1) Positive changes in self; (2) Negative changes in self; (3) changed attitudes; (4) improved work skills; (5) increased knowledge; and (6) closer family relationships. The categories are described in greater detail in the following paragraphs.

1. Positive Changes in Self

The first category, positive changes in self, consisted of increases in traits like tolerance, patience, confidence, respectfulness, maturity, open-mindedness, competitiveness, adaptability, independence, sensitivity, and decreased impulsiveness. Some subjects simply felt they were better people as a result of their overseas experience. Most of these changes were mentioned by several subjects. The following quotes are typical example of the responses in this category.

"We are more tolerant because we have been through the experiences. We are more ready to accept
new people than we might have been. The fact that we learned other languages has definitely improved us."

"In the first 6 months [the most important thing I learned was patience. Not so much with people but with their equipment. ...It was easier to call the States and patch a call through them than to call another city in Venezuela."

"It's the power experience that let's you understand how you can implement things. Once you are in the position of being a commander and you make things work through your own ability and your own creativity and your own hard work, you understand how that works. And then you ...can do that anywhere and anything."

"[I didn't really enjoy the experience] but it was like jogging for your health. How much fun is it? You feel better when it's over. It builds your character [by] understanding that people are different."

"I matured dramatically when we were abroad...We were much more self-confident because we had achieved something unique...and had taken advantage of the culture."

2. Negative Changes in Self

Very few subjects reported negative changes in themselves. Those identified were a loss in innocence partly due to joining the managerial ranks, becoming too sensitive to other's viewpoints, decreased confidence because the experience highlighted the weaknesses of the subject's work style, and becoming more of a loner.

"I changed very much [as a result of working abroad]. On the negative side, I became less confident. I think I became too sensitive to other people's viewpoints of me. [HOW DID THAT HAPPEN?] Don't know. I think it is probably because...I was
more interested in quantity versus quality before. Working in London, working in the U.K., made me more aware of quality and making sure the job was done right. And that means I spent a little more time second-guessing myself to make sure that the job is done right. In the U.S., if you're not completely buttoned up, you can get by while it's impossible overseas. That really comes out as a glaring weakness that can be exaggerated as a point....The British look at the process, not at the results."

3. Changed Attitudes

Changed attitudes centered primarily around the acquisition of a broader perspective. Subjects mentioned becoming more appreciative of both cultural differences and of what Americans have. Some stated they had a different attitude to work as a result of the experience and that life was more interesting now than before. One subject had acquired the Chinese prejudice against laziness. Several mentioned that they have a better appreciation of the world as a bigger place than just the United States.

"They [my family] have had that experience [of living abroad] and it is something that broadens their whole outlook, their whole life perspective."

"The pure personal broadening experience of being out of the country [never] stopped or became different [throughout the experience]."

"It just feels like we spend some [personal] development time away from home. I don't know what areas and I don't even know why. Just we think of America as being kind of closed and I guess we feel we did something to maybe change that for ourselves."

"I have a greater appreciation of other people's cultures. And I don't see other people being different from me other than in their customs. There might be different food, languages but if they are raising kids, their aspirations and desires...they want to do a good job just like anyone else. ....There are differences that you have got to respect and to accept...It makes me more appreciative of what I have here - the educational opportunities, the job opportunities, the idea that you can go as far as you want is more [characteristic] of the U.S. than Europe."
"When I left the country, I said socialism is worthless. Capitalism is everything. I don't believe that now, I'm somewhere in between. [YOU SEE MORE SHADES OF GREY, NOW?] Oh yes."

4. Improved Work Skills

The specific improved work skills were primarily interpersonal in nature. Improved communication skills in general and increased listenting skills in particular were most commonly identified. Others reported an improved management style, an understanding about power they had not had previously, and the ability to do higher quality work. One subject felt he had acquired more technical skills abroad. Several subjects reported that they had gained a broadened business exposure.

"I think [working abroad] opens up the people side to the working relationship. ...Because of the communication problems, I think you really have to work at how long it should take you to present it [when you want a project done]. Do they really understand? You need more follow-up on the personal side...and [to pay more attention] to the people differences. Certain things mean different things to different people."

5. Increased Knowledge

The increased knowledge category can best be described as the result of learning about many things - languages, other countries, human nature, politics, history, art, and the "finer" things in life.

"I am more appreciative of good music and good food. And I think the cultural traditions in Europe are in some regards better than ours."

"I am a good friend with a Greek guy...he is much more well traveled than I am....and we'd talk about what's happening with Greece and what's happening in different parts of the world...with my British friends from London, we talk about what's happening with the EEC and British politics...These are things that I had no idea, I had no interest in these things before I went to London....And I'm more aware of the theatre and the arts."
6. Closer Family Relationships

One often hears that the expatriate experience either brings a family or a marriage closer together or breaks it apart. Both have some support in the literature. Increased communication and family solidarity is reported by several studies (Komarovsky, 1968; Lanier, 1975; and Torbiorn, 1982). Torbiorn's study revealed that 85% of the expatriate wives reported an increase in a "sense of community in the family." These ratings were even higher during the initial culture shock phase when the need for psychological support is greatest.

Several subjects in the current investigation commented that they had grown closer to their families. For some, this had a flavor of "circling the wagons" in response to an external threat, which supports Torbiorn's theory. For others, it was merely a matter of having more time available for family, less distractions and individual pursuits than exist in the U.S., the "work to live, not live to work" credo found in many other cultures, and the opportunity to share the common experience of novelty.

"[My children] became very very good friends.... They are all married now but they still talk once a week and vacation together....the fact that they lost friendships [when we moved]...they developed a loser knit relationship among themselves than if we had stayed in one location."
"The family was closer overseas than it was here. A lot closer, that was nice....[because of] self defense. You drop a family into a foreign environment, you kind of circle the wagons. It was new for all of us. We would say, 'Let's go down to the beach. Great, let's go.' We went as a family. Everyone went along because there was nothing else to do [in some ways] although that's probably the wrong way of putting it...They were seeing it just as new as we were."

This section focused upon the various types of changes expatriates noted in themselves as a result of their overseas experience. The next section describes the nature of the transformational process.

The Nature of the Transformation

"But whether small or great, and no matter what the stage or grade of life, the call rings up the curtain, always, on a mystery of transfiguration - a rite, or moment, of spiritual passage, which, when complete, amounts to a dying and a birth. The familiar life horizon has been outgrown; the old concepts, ideals, and emotional patterns no longer fit; the time for the passing of a threshold is at hand." (Campbell, 1968, p. 51)

Much like Campbell's description of heroic transformations as a dying and a birth, the process of transformation that occurs with expatriates seems to consist of both a "letting go" and a "taking on".

Letting Go.

Expatriates relinquish the following factors:
1) cultural certainty
2) unquestioned acceptance of basic assumptions
3) the unexamined life
4) frame of reference
5) accustomed role and status
6) knowledge of social reinforcement
7) accustomed habits and activities

Most of these factors are cognitive or attitudinal in nature; they relate to the mental maps or the personal constructs we create and which need to undergo massive redefinition as a result of the experience. Others refer to one's status in relation to other people and strike at one's self identity. Another category refers simply to one's willingness to substitute new activities for habitual ones (Mendenhall & Oddou, 1985).

1. Cultural Certainty

Cultural certainty refers to the implicit faith and pride Americans have in their own country. Our size, geographical location, previous economic dominance, ethnocentrism, and relative lack of interest in international issues shelter most Americans from the negative opinions and comparisons of other nationalities. In contrast, expatriates find themselves forced into the position of defending their country's foreign policy. To their chagrin, it is not always defensible. Furthermore, they discover that other countries have some advantages we lack. Therefore, they are forced to relinquish the certainty that our country is always "right."

"...[before, you thought] the U.S. was the greatest thing. [Now] you knew that was not the case in a large number of circumstances, and yet you knew you were never going to get it changed. Just like you
knew you were never going to get it changed, the things that you did not like in Venezuela."

"There were some troubling times for America's foreign policy during this period and that was very interesting. Not always the most enjoyable to hear and read what you would consider from responsible people and responsible publications. Different slants on America than we feel. But again, it was very interesting and also a challenge to try to get our point across."

"I became aware of my nationality. I became aware of the kind of stereotypes about Americans overseas. I became aware and sensitive to the perception of Americans overseas. That, to summarize in very broad terms, was...that all Americans were loud, ignorant of world events and politics...ruder than the European environment...and the Americans had a tendency to be short-sighted."

"I think eventually you have to give up your instinctive emotional reaction to any criticism about the United States. ...After a while, you realize that...there was another way of looking at the United States....at that point you became receptive to criticism as long as it was presented in a positive, constructive way which in Japan it almost always was....I think you have to be prepared to accept criticism of your country by an outsider. When I first arrived, I wouldn't accept it...that is probably part of the arrogance for which Americans are so famous overseas."

2. Unquestioned Acceptance of Basic Assumptions

This next category resembles the previous one because it too forces the expatriate to consider factors that were previously taken for granted. Schein (1988) wrote about the basic assumptions that form a hard to excavate layer of our culture. This is similar to the implicit cognitive maps that people inherit from their cultures. Coming into
contact with other cultures makes these assumptions visible and forces the expatriate to question their validity.

"I think I was introduced to a lot of different thought processes, a lot of different backgrounds. Democracy—socialism being one major difference. And I certainly learned to try to evaluate people who acted differently and came from a different background than I did from that person's perspective. Now whether I do that well or not, I don't know, but I certainly learned to do it better a bit more."

"My wife and I used to put them somewhere in the 1950's in terms of where their appliances were and their way of living. In some ways they were superior to us. The one thing I guess we really came away with overall, was that we began to see that they were a very conscious society.... conscious of their limited raw materials and didn't waste a lot. They used everything to the fullest. And we quickly began to see ourselves as the throw away society....It really made us look at ourselves and see how wasteful we are in the United States."

"Giving up some of your American values. You find that you change in subtle ways. The way you live, the way you act."

3. The Unexamined Life

Socrates stated that, "The unexamined life is not worth living." However, expatriates are often forced to examine their lives, not of their own volition, but because the situation demands it. Being taken out of their normal context provides the surprises, changes, and contrasts Louis (1980) wrote about that spark introspection. Spouses in particular have to construct a life for themselves and, in doing so, evaluate their lives and determine what should and should not be included.
"[The first few days] were pretty much equal to what you read in all the how-to books about expatriate businessmen. I arrived, was met at the airport by the general manager and his wife. And the bank car and the bank driver...And the next day I started work. And I walked into the office and i had a desk and a secretary. And fortunately, everything laid out for me. And my wife had nothing. I mean, she woke up and had no structure to her day. She really had to construct her life and fortunately did it."

4. Frame of Reference

This theme does not refer to Torbiorn's use of the same term to describe native and local mental maps. Instead, it refers to the relinquishing of one's personal frame of reference when it came to judging the other culture. Successfully adapted expatriates learned to accept the other culture "as it was", without feeling a need to compare it to American standards. If we think in terms of Kelly's personal constructs, this would signify that the nonjudgemental expatriates have developed a separate construct for the other culture or a transcendent one that included both cultures without the need for negative comparisons. The subjects complained about expatriates who could not stop making comparisons.

"Ugly Americans think everything is better in the United States than it is in the world...one of the things I try to do is appreciate people for their own culture and their own situation as opposed to trying to ask, 'How do they stack up to Americans?' But most other cultures look at Americans conversely as 'how do they stack up compared to the Asian culture?'"
5. **Accustomed Role and Status**

An expatriate assignment usually involves some type of role change, either at work or in one's personal life. Such changes may involve both higher and lower status, although the former is most likely the case with expatriates in terms of their work roles. Expatriates assume the role of the stranger, an unknown commodity, once they leave the borders of their own country. If they cannot speak the local language, they may even be treated as if they were stupid, a humbling shock to one's self concept. An even greater shock is to find oneself stereotyped in an unflattering role.

"I think they approached us with initial trepidation or prejudice. We tried to treat people like people and those people who took the trouble to get to know us and judge us on our merit would arrive at the conclusions that they liked or didn't like us for our opinions on things or our way of behavior and not simply because we were gringos."

"There was one case where we launched a new product, where I depended on somebody else to get it ready to be launched. And when we launched it, we had problems for 3 months. I should have known better and accepted the responsibility myself to do that...and been on top of the process to make sure it had been done right. And that really pissed me off because it was evidence of what all the Brits were saying. Americans are not thorough, they are quick off the gun, 'you are cowboys', 'you don't really think about doing a quality job.' And here I was, rushing a new product through...and not doing the job right. And that was a source of a loss of confidence."
6. Social Reinforcement Knowledge

Lack of knowledge regarding the social cues of another culture is the principle definition of culture shock (Oberg, 1960). Expatriates quickly discover that their accustomed social behavior does not yield the expected results, as seen in the following quote.

"I didn't know how to get business done or even buy meat, for that matter."

7. Accustomed Habits and Activities

Several subjects mentioned that it is necessary to make substitutions for their usual activities. Rather than bemoan this loss, successfully acculturated expatriates make replacements.

"The most common [disappointment in other expatriates] was that they didn't seem to look at [the experience] as an opportunity to get to know [the other culture]. Their major complaint was, 'We can't get this and we can't get that,' rather than taking advantage of things they could get, even if they were different."

Taking On. Whereas the last section described what expatriates relinquish, this section identifies what they take on. Many of these factors are direct replacements for what was relinquished.

1) internalized perception and values of the other culture
2) the role assigned by the other culture
3) a broadened outlook
4) the acceptance of and ability to handle paradox
5) a different experience of oneself
6) a sense of mastery
7) an addiction to novelty

1. **Internalized Perception of the Other Culture**

Expatriates are sometimes shocked to find they have taken on the perceptions and opinions of the local culture. They come to see the world through the eyes of the host culture.

"[DID YOU CHANGE?] Yes, it made me more open-minded. It certainly was confusing - I'm not sure it's gone yet.. I didn't find the answers easy before and now it's even harder. There was lots of stress there and sometimes I think it's still with me. It changed our lives and the way we look at things. Before we saw an American's life from an American's point of view. Now we see an American's life from 2 points of view - American and British. Everything is like that. When I was there, I would always think "Whoops, what do they think of that?" and you can't quit doing it, even though there's no need now. That's different."

"They [the British] were surprised I was an American because they called me quiet and unassuming. And they always asked me why Americans are so loud and I told them I can't answer that question....I think they generally found Americans to be pretty obnoxious and actually while I was over there, I found Americans to be pretty obnoxious. I was embarrassed a lot of the time I used to see Americans over there."
In some instances, expatriates consciously relinquish some of their own values and acquire those of the local culture that strike them as preferable.

"You learn to become appreciative of some of these things that you were not accustomed to, [ways] that country is different than your country. You like some of theirs [customs, values]. There are some things that you pick up that you like."

2. The role assigned by the other culture

This section concerns both the representative role that many subjects felt they had to assume and the different roles they assumed as a result of their job function. It is interesting to note that the representative role can be interpreted as a form of loyalty to one's own culture and to an expatriate subculture. For example, one often hears the statement, "I don't want to ruin it for the other expatriates who will follow me." This implies a sense of history and even a sense of brotherhood among expatriates. Perhaps it is a reflection of seeing themselves as different from people who are not expatriates and therefore, they have a sense of automatic kinship with other expatriates. The idea of "not ruining it for other expats" is seldom presented in training programs; it appears to be a naturally occurring phenomenon. And it is perhaps in the service of this phenomenon that some expatriates confront their own
patriotism for the first time. If expatriates were disloyal or uncaring about how others saw Americans, they would not have tried to maintain the image that is described below.

"I found that I had to made decisions quickly and as accurately as I could and follow through on them. I felt people were watching me in my performance. So I tried to be extra certain of what I was doing and not drop the ball, because I didn't want to mess up on the next expatriate that would come. You know, try to keep that continuity at work and the same thing at home, curiously enough. When you go out and you are in an expatriate company, as soon as you open your mouth, people know that you are different. And you feel different. There is more of a sense that you are kind of wearing a patch on the back of your jacket or something that has the American flag on it. So you feel that, 'Well, gee, should I do this?'. Some of the things I might do here I wouldn't do there because it would be disrespectful to the host country. You feel like you are a representative of the States ...my wife said ...you are like a petri dish in the lab. That people are looking to see what grows there. You have a tendency to try and act like a good ambassador for your country. ...If you make a social gaffe, then people tend to allow it more because you are a foreigner. But they also watch out of the corner of the eye to see [what you do] and they tend to classify Americans by what they see. If you are the only contact they have had with an American, and you are a klutz, then they are going to think that all Americans are klutzes. You feel pressure really."

The representative role or the prestige the job enjoys in a different culture sometimes forces expatriates into a higher status position than they enjoy at home. The following quote describes this occurrence.

"I had contact with people whom I would not have contact with here. Embassy people, fairly high level foreign nationals. I was considered head of a company
there, so I was invited to gatherings [where] I met
people I don't meet here."

3. The acceptance of and ability to handle paradox

Judging from the number of expatriates who reported
experiencing the explicated paradoxes, learning to
appreciate and live with these dualities is something that
expatriates acquire. The topic is not discussed here since
it was covered in depth in a previous section.

4. A broadened outlook

Many of the expatriates spoke about becoming more
worldly and taking on different viewpoints. This is an
obvious way that expatriates change and is a topic that was
described in a previous section.

5. Experiencing a different side of oneself

Some expatriates find that they resonate with parts of
the other culture; these are usually the parts they readily
assume. Some of the expatriates talk about this phenomenon
as taking on the values of the other culture; for others it
is allowing the expression of a different side of
themselves, perhaps a shadow side in Jung's terms, within a
different context. Another way to frame it is in terms of
Levinson's (1978) life structures which never allow the
total expression of an individual's personality. The
overseas context contains life structure surprises for
expatriates or merely confirms suspicions they had long held about themselves.

"I think I have always been somewhat of a frugal person and tried to not waste things. I guess German fit in well, or I fit in well with German [and their ecology and recycling movement]"

"More than half my reasons [for wanting to go abroad again] are personal. I enjoyed the discovery of a new culture. I enjoyed, maybe I like being different. Being different and not in a negative way... I liked the climate. I liked the social life. I'd go back in a minute....I feel homesick [for Mexico]. "

6. A sense of mastery

The mastery is derived from cracking the code of another culture, conquering a difficult situation, and developing a different perspective, and a higher consciousness. This topic was addressed in the beginning section of this chapter which identified different types of "hero talk".

7. An addiction to novelty and learning

Learning was the most common word in the expatriate transcripts and many of their statements referred to novelty. Some of the learning no doubt contributes to the sense of mastery that expatriates feel and it is clearly what is required to acculturate oneself to a culture with a different social reinforcement pattern (Furnham & Bochner, 1986). Perhaps addiction is too strong a word to employ
here, but expatriates do enjoy a fairly steady diet of the both learning and novelty. Some maintain a high level of novelty by traveling extensively on their free time. When the novelty wears off, some are ready to move on to another country or return home. For some, the novelty may keep them from missing home. For others, the novelty and learning becomes so addictive that home seems flat or boring when they are repatriated. The following quotes describe novelty and learning in the expatriates' own words.

"[The first 6 months] was a tremendous learning experience. That's when all the learning comes. You walk in, you don't know anything. And people have to train you and show you how to do stuff and give you a knowledge base. And after you develop that knowledge base and these working relationships, then you start to become functional."

"We miss the funny things that used to happen because that was a neat learning. You are always learning something that is a little bit different."

"The first thing I would look for [in selecting someone to go abroad] is someone who was technically competent...You can't train anybody overseas...Second would be an inquisitive mind, someone who is not locked in on their way of life, their attitude, their cultural restrictions. Someone who is always asking, "why are they doing it that way? Why is that building built in that architecture? etc."

"I was trying to do a number of things [in the first 6 months]. One, to become familiar and feel comfortable traveling in Europe. Two, trying to understand the individual management styles and cultural differences between all the different countries and the way they did business. I was trying to learn a diverse product line which I had not been exposed to before. So I was trying to stay alive. It was like a crash course."
"[WOULD YOU GO ABROAD AGAIN?] Oh yes, because it is different. It is a change. It is interesting. It is exciting. There are new things to learn, new people to meet."

"There is the period where you get there and it is all exciting. But see, I was picking that up throughout the entire tour be going someplace else...every long weekend, I was gone somewhere on an airplane."

"We would be invited to the New Year's Eve party but everyone would be invited for 8:00; we were invited for 7:00 and we only lived across the street. Every year...he would welcome her first...and we would sit and chat...for about an hour until the others came. ...Finally I found out that there is a Scottish legend or tradition or belief that if an auburn haired person is the first to cross your threshold on New Year's Eve, you have good luck for the year. My wife has auburn hair. So he [our neighbor] had this little hidden agenda. And you have to work hard to figure it out, because you don't know what the cultural ways are. So you are constantly wondering what the intrigue is. You would not have that if you lived in the American community."

"I am definitely more interested in experiencing different situations and cultures than I was when I went, although that is what drove me to want to do it. More of a need to go and do things other than just staying here in Cleveland and being content and visiting places if nothing else."

One of the most common and, in their eyes, most significant learnings is the realization that people are both similar and different. This reflects a different level of consciousness in how they perceive different cultures.

"[The most important thing I learned] was which things are immutable between cultures. Which things are human nature and which are cultural. For example, the size and shapes of autos vary from country to country but the notion of a luxury car is basic. People would get more pride and prestige from a Chevrolet than a British Leyland auto. So I learned
which things were basic human nature versus cultural. [WAS THAT USEFUL TO YOU?] Yes. People want to be respected - I knew that before but this trip brought it home. It might sound trivial but it was significant to me. You have to look at them when they're talking and be respectful, no matter where they are. You have to look at them like a person."

The same learning applies to the transformation that occurred with these subjects. With one exception, all the expatriates reported that they had been transformed by the experience. Thus, they were similar to the others regarding the basic transformational themes outlined in this section. But they were dissimilar because the specific details of their transformation were unique. As Campbell said, the hero gets the particular adventure for which he or she is ready and the journey inward that characterizes the hero's adventure by definition produces unique learnings.

III. The Return

"The return and reintegration with society, which is indispensable to the continuous circulation of spiritual energy into the world, and which, from the standpoint of the community, is the justification of the long retreat, the hero himself may find the most difficult requirement of all. For if he has won through, like the Buddha, to the profound repose of complete enlightenment, there is danger that the bliss of this experience may annihilate all recollection of interest in, or hope for, the sorrows of the world; or else the problem of making known the way of illumination to people wrapped in economic problems may seem too great to solve...of if the hero makes his safe and willing return, he may meet with such a
blank misunderstanding and disregard from those whom he has come to help that his career will collapse."
(Campbell, 1968, p.36)

"[It was] both good and bad coming back....Sad feelings that we left friends. We left a comfortable life, a special life. We are back in the States now where we are part of a big pond, not a big fish in a little pond. There were adjustments at work, there were adjustments in family. It was good to come back to our own country; we feel comfortable here. And it's both good and bad to be in contact with family members."

The return is the last phase of the hero’s adventure, and according to Campbell, perhaps the most difficult. It consists of three basic themes: (1) the hero’s refusal to return; (2) the crossing of the return threshold; and (3) the hero as master of two worlds. All three themes help us gain a better understanding of the expatriate experience.

3.a. Refusal of the Return and Rescue from without

The majority of these expatriates, 26 of the 35 (77.1%), were ready to return home. Two did not mention this issue. Six expatriates (17.1%) were not ready to return. This sample does not have the career expatriates who refuse to answer the call to return to the States. That population would not be located in Cleveland. Among this sample, there was a strong career concern that they might be overlooked if they stayed abroad too long at a time. However, a fascinating subgroup was identified in
this sample - those who were called back to the States before their tour of duty had expired or before their projects were completed. In most cases, they had been told they would be abroad for approximately 3 years; instead they returned closer to the 2 year mark when they felt they were just beginning to be acculturated and/or effective. Those who came home early seemed to talk about their return in terms of grieving.

"We had a routine established. My family had accepted being there. Things were going smoothly....I had all these projects going and things were just really starting to come into their own...I thought, 'This was going to be it! We really are going to roar through this next year.' And then I was told I was coming back. And 'No, this can't be!' ...I had to tell my wife and she said, 'I am just getting used to this; I had just psyched myself into 'this is the way it is going to be' and now ...it's like pulling the rug out again.' So there was a little bit of bumpiness in preparing to go back."

"For me, it was difficult [to come back] because I did not feel that we were ready to close it down at that point. I didn't think I could do as good a job from this side as being directly there and so I had some resistance, let's say, within myself. I was a little hurt that I had to come back and not be able to finish up what I had started. It took some adjustment....I didn't like it but I went along with it...I had also been reading up on expatriates ...how they become so far out of the mainstream that they are totally forgotten. So on the other side of it, I thought maybe I should get myself back there...I did not want to be left out in the cold."

"I'd call the last months 'the autumn months', although it's a little sad. By the end I was quite able to get along and at that point it was all cut off and you come back here....I felt a little cheated....I
don't feel that I did as much professionally as I wanted to because it took me so long to become acclimated, to assess reactions to directives and so forth. That I would have a little bit better idea of how to assume the authority and I think I could accomplish more and have a better, more personal identification....one of the reasons why I didn't like leaving Mexico was I didn't like leaving with the feeling of accomplishment that I would have wanted to. Maybe no one ever does but I would have liked to have been able to stay around longer and to see some major projects through. And it has nothing to do with credit....but you have to harvest the fruit as well as plant it."

"There were some things we were happy to be back to, but I think on balance,...the feeling was one of 'We weren't ready yet.' We weren't finished. And that did not have anything to do, I think, with just coming home. It was the fact that when we went, the expectation was that we would be there for a longer period of time....[If we had known], I would have come home with a different attitude.... None of us had really learned the language to the extent that we had committed, I think. Giving up the house and going through the trauma of moving and doing all of that. One thing that we were looking forward to was being able to speak Japanese...which would have made me more effective and a better contributor to [the company]. But that is a small thing. But it was disappointing to come home so soon....I think the only thing that would prevent it [going abroad] again is we have made sort of a commitment to this house which, in a sense, was the therapy for coming back, that we built this and it was a neat project."

Several of them mentioned that their remedy for coping with the disappointment of returning early was to buy a new house and throw themselves into fixing it up - a materialistic, nest-building reaction that is the extreme opposite of the adventurous touring they described abroad.

There are several possible explanations for the extreme disappointment of the early returnees. First, the
issue of expectations seems to be crucial with expatriates, perhaps because so much of the experience is fraught with ambiguity. Their expectations of what they expect to find abroad and how long they will stay seem to determine their adaptation. Secondly, the findings of this investigation indicate that crossing the threshold to adaptation is very difficult and requires commitment, energy, and sacrifice. Expatriates like to realize the benefits of their efforts and gain closure on the experience. Both the literature and the qualitative findings of this study support the existence of a definite adjustment process. Perhaps closure cannot be gained unless all phases of this process are experienced. Thirdly, perhaps the same strong desire we found to be necessary for a successful adjustment abroad is equally important for repatriation. Certainly, repatriation can be difficult, as seen in the next section, and the desire to return home may be essential.

3.b. The Crossing of the Return Threshold

In one of the well-known fairy tale motifs, the hero comes out of the forest with gold and it turns to ashes. The same can occur with returned expatriates. In this sample, 20 subjects (57.1%) said coming home was difficult; three people said repatriation was more difficult than going abroad.
What are the reasons for difficult homecomings? Several themes emerged from the interviews: (1) the 'You can't Go Home Again' syndrome; (2) the 'Little Fish in a Big Pond' syndrome; (3) high degree of uncertainty; (4) other's lack of interest in their experiences; (5) idealization of home and false expectations; (6) readjusting to decreased autonomy; (7) the testing period; and (8) missing life abroad. These themes will be described in the following paragraphs.

1. 'You Can't Go Home Again'

This theme refers to the presence or absence of change and it is not a simple variable. For example, the fact the expatriates both do and do not change abroad can make their reentry difficult. From my own experience, the phenomenon of "the record getting stuck" is quite common with career expatriates and even immigrants. The expatriates retain the dominant values of the era when they left the country. However, the culture continues evolving but some expatriates do not. For example, the transplanted Norwegians in Minnesota are far more conservative in some respects than native Norwegians because the emigrants still believe in the values that were current when they emigrated. However, there are other values that are modified by exposure to the foreign culture.
The expatriates in this study clearly felt that they had changed because the experience was so significant to them. They are no longer the same people and may find they have outgrown parts of their previous lives. Therefore, some of them complain that they have changed while the people at home have either not changed or have changed in ways that are no longer are compatible.

"It was probably as difficult in some ways anyhow to come back as it was to go....Well, a large number of people had not changed at all, which made it a bit difficult. I think that is pretty common with people who travel."

"You are looking forward to remeshing. Here is a guy that you pledged a fraternity with, you were at his wedding and shared a lot of good things and dreams and all that. And then you sort of get back together and it is not like it used to be. So it is a disappointment, disillusionment in some ways. You know, the old 'can't go home again' type of syndrome."

In contrast, some expatriates find too much change upon their return. Their image of their company, friends, or community had remained static. In reality, some of these subjects returned to companies that had undergone tremendous upheaval and down-sizing in their absence.

"Life went on here and all of our friends moved right along for those 2 years. I mean they still accept us as their friends, but is like we are starting over again. It is a different relationship...even here within work...as long as I have been with the company, those 2 years out, ...You are taken a little bit differently."
"Maybe my situation was a little different where I was going from a superior to an inferior position by coming back.... I think that was the most difficult part of my transition back. Most people think that 'Wow, it is going to be tough to move over to that foreign country' and never give a thought to when they finally come back home...you have got to consider that because the world keeps changing. Even in that country that you thought you were so comfortable with."

This last quote also contains a reference to the loss of prestige and status that expatriates sometimes face. This was not a predominant theme with this sample, but it did occur with a few individuals. In some cases, there was difficulty returning to work; in others, the failed expectations concerned only their social life.

"I was lonely again [coming home]. I had lived here for 30 years before going to London....but I didn't have the people, the social network. The people here had changed or moved away. But it was sort of fun [returning to the company]. They were promoting me and I was doing well."

2. Little Fish in a Big Pond

This phenomenon has been written about extensively in the expatriate literature. Expatriates themselves frequently use the phrase, little fish in a big pond, to describe their return.

"It was a downer to come back. You have to step down. You have all this power and three secretaries, unlimited expense accounts, not really unlimited but it seems like unlimited. Here, you are just a normal person."

"[Coming back to the company] was fine other than I had a specific problem in that they did not have a
work assignment for me. So that was a little tough. When you come from such an exciting thing when you are running the thing and you come every Monday and they don't know what they're going to do with you, that's tough. And the weeks were long."

3. High Degree of Uncertainty

The level of uncertainty involved in a move abroad is very figurative, but there can also be a good deal of uncertainty and ambiguity involved in the return. The lack of an assigned job contributes greatly to this ambiguity, as do the logistical details of both leaving the foreign country and settling back into the United States.

"There were a lot of details. You start dealing with the phone companies, the bills and tax people and selling off cars... We were a little more adept in how to go about it but nonetheless, there were a lot of new facets to learn. And then the thought of what I would do in Cleveland when I get back there? What is in store for me? ...[Eventually] a position was made available for me, but at first it was just, 'Well, you are coming back' and 'To do what?'. 'We'll think of something.'"

4. Other's Lack of Interest in the Experience

A common complaint of returned expatriates is that no one at home really wants to listen to them talk about it. Several subjects joked about the brief time limit they were allotted to hold forth on their overseas experiences.

"[Living abroad] is one of my favorite things to talk about. ...One of the frustrations about having been a former expatriate is that no one is really
interested in knowing what it was like. And so an opportunity to talk about it is a rare luxury."

"I am grateful to have the time to rap with you, because I feel that many, many times I bore people that I am with when they ask how it was...They want your minute and a half and that's all. And everything that happens reminds me of something and I have to bite my tongue."

"We were so anxious to get home and it was wonderful...but frustrating too. They don't want to hear about it though you think you've gone through something unique. They'll listen for 30 seconds and tell you what the Browns did in your absence. The feeling is that you can't hold their interest long enough to talk about it. ...they think 2 years in England was like a vacation so don't tell them about any problems because they're convinced you were really on vacation. And don't tell them any good things because that's boring too. That goes for family too - they're just more polite about it."

Not being allowed to talk is made more frustrating due to the degree of significance expatriates attach to the experience. It is likely that Harrison and Hopkins' (1967) description of Peace Corps volunteers, who return with a collection of war stories and few abstract conceptualizations about their experiences, also pertains to expatriates. The unwillingness of others to listen may prevent former expatriates from making sense of their experiences. Like people in any new setting, they will be struck by contrasts and feel the need to comment upon them. This represents a natural cognitive process; yet it is often not tolerated. It is difficult to feel like a hero if people will not listen to your adventure.
5. Idealization and False Expectations

Several expatriates reported that they had idealized home when they were abroad which resulted in unmet expectations upon reentry. It would be interesting to know how widespread idealization is and if it occur with most expatriates or primarily those who are unhappy abroad. It is also likely that the returned expatriates may idealize their life abroad.

"If I would have had the right job, I would have stayed [in Brazil]...the only problem we had was that stage in life when you wonder what's next....You feel like you don't have anything where you are. You have more than you thought. Everything is better in the States than it was there. You just know it is, which was a real shocker when we came back. That was the hardest part...it took us 2 years to get comfortable here ...because we had built it up to the point...People don't show up on time down there. We bought a house here and had some work done on it. People never would show up. They would not return phone calls. Workmanship was shoddy and it was just a complete shock."

Unmet expectations are a factor that caused unhappiness when expatriates moved abroad; however, the same phenomenon occurs upon reentry, as is seen in the following quote.

"They [the expatriates] are thinking they've done a kindness, or a service to the company and they're thinking they are going to get some remuneration for that. In fact, it's more likely that they'll be demoted. ...On line and block charts everybody reports to somebody, right? Now if you're in a corporate HQ like here, the line and block charts are pretty well defined. And when you are out there, you are not on this chart... I wouldn't see why this would be any different in any company for the simple reason that 'out of sight, out of mind.'"
The "out of sight, out of mind" syndrome is another common one in the expatriate literature. However, few individuals in this particular sample reported that they had suffered from it. However, they did identify it as a common reason for returning home rather than staying abroad.

6. Readjusting to Decreased Autonomy

This is one of the most common repatriation complaints. It reflects a classic differentiation-integration issue. These subjects all work for large corporations. The relatively autonomous role that some of them perform abroad lies in sharp contrast to their positions in large bureaucracies. Abroad, they become differentiated in terms of autonomy; when they return, the organization has to integrate them back into the fold. However, in this study, it is the expatriate who readapts, not the organization.

"In Europe, we had maybe two meetings a week; we made about a dozen decisions every day. Here I have seventeen meetings a week; we make 2 decisions a day. It is the bureaucracy, the having to work through 9 other different organizations....Over there, I could say, 'Hey, what are you going to do about this price?'. Leave it, explain it, make a decision and run with it. You didn't have to go to that other power."

"It was very nice to come back and see the people and get settled into the house. Of course, those
would be the high points. But all of a sudden, I went from this position of being a manager and having virtually complete control of what I did and what the people did who worked for me to being just one of the people here again. Having a director sitting 20 feet away and 2 managers sitting even closer to me. I was answerable to all 3 after almost having no boss at all....When I am doing something related to Europe or am in Europe, I am happier from a work standpoint...[because] I just feel that what I am doing makes more of a difference in Europe than here."

"They [subordinates] would come to me and ask for a decision about certain things. That's a nice feeling. You could go overboard with that too. There are some people in the operation that I think may have trouble coming back because they may have fallen in love with themselves over there. I tried to downplay that because you know you have to come back here sometime."

A former expatriate who is currently responsible for the international human resource program warns potential expatriates about this issue.

"We tell people even before they are going to be aware of the [decreased autonomy when they return]....We do take it seriously on finding the right spot for them, not to just bring them back and not have a challenging opportunity for them....but certainly the level of autonomy they have when they return is less."

7. The Testing Period

The testing period is another phenomenon that is usually more visible when the expatriate goes abroad. The host country nationals, particularly in cultures that have impermeable outer boundaries, will observe expatriates until they have proven themselves trustworthy. However, the same phenomenon can occur when expatriates return to their
companies. In some instances, the pressure to prove oneself comes from the expatriate rather than his or her peers.

"It was more difficult [to come back] than I thought it would be. Even in a couple of years, a lot of things change. There was an underlying attitude that no one vocalized here - there was a testing period among my peers and supervisors to see what this experience had done to change me. You could feel it, nobody would verbalize it, but you could feel that it was there. You could pick up on it in subtleties and comments which was a little disturbing. The first time I went to a meeting...the most senior of the committee remarked on the British suit I was wearing.[I WONDER WHAT'S BEHIND THAT?] I don't know. Maybe some jealousy. There's certainly a lack of understanding....There's a perception here that Britain is a little American and there's not a lot of difference. The person shouldn't change at all.

"The people [at headquarters] have been hearing all the things happening in Europe. Things have gone well over there and all of a sudden, 'Here comes back. Let's see how wonderful he is.' So even though I've got to admit, I never noticed it from the people themselves, I tried to gear myself mentally to go in and try to prove on your first couple of jobs that you are in charge of the job, this wonderful person they heard about in Europe....I thought I should prove that, especially since so many of the people were new by the time I got back. More than half the department had changed. And especially if I was going to jockey myself in a position for future advancements. I think it was important to establish my position quickly with the new people."

In many ways, the return is merely the beginning of yet another hero's adventure.

8. Missing Life Abroad

Returning home made expatriates aware of what they missed about life overseas, the same phenomenon that occurred in reverse when they first went abroad.
"I miss the excitement of living overseas, but then, I still get to travel."

"I miss a lot of things too, ...rugby, squash...And we miss the sights and sounds of London...but we really haven't been terribly nostalgic yet, but that time will come."

"When you are overseas, you know you are in a learning environment. Everything is exciting. You feel as though you are growing. When you move back, you feel as though, 'Here I am at square one.' And it is a very depressing situation to be in. You feel you are not growing anymore. And that's even further compounded is from a career viewpoint, you don't perceive your job as a growing opportunity."

These themes answer the question of what makes repatriation difficult, but we should not lose sight of the fact that it was not difficult for all the expatriates.

The research design does not allow for firm conclusions to explain the difference in attitudes regarding the ease of repatriation. However, some hypotheses can be formed. First, it seemed to be most difficult for those who returned before their expected assignment was completed. There is some evidence that the ability to return without experiencing great trauma is a cumulative, acquired skill, just as living abroad is. The more cultures a person enters, the easier it becomes; the more times one returns home, the clearer the expectations that he or she has about what will occur and what skills are required. The following quote supports this theory.
"[The second time coming back to Cleveland] was better. Just realizing that that's the way it is - you have changed and I'm not the first person to realize this. ...You can't necessarily go home again, which was written a long time ago. It is different when you come back. It is okay this time because I think my expectations were different and also I went from a very fascinating international environment into a very provincial environment when I came back to Cleveland in 1971. Cleveland is not as provincial now as it was then, and it probably wasn't as provincial then as I...believed then."

People develop their strategies about how to succeed both abroad and upon their return. The long term expatriates in this study experienced less adjustment problems upon return than people who had only been abroad a short time. Some of them had returned before and knew what to expect this time. Another theory is that after entering many cultures successfully, one uses the same skills to enter one's own country. One does not think "I am going home" but rather, "I am entering one more culture".

"[Coming back] was not as difficult as I had been led to believe... The most difficult thing for me...was not having the same level of autonomy....in all of the overseas locations there was a plant involved and if you got a little frustrated on the telephone, you could go out and wander around and talk with the people in the plant. When you are back in the home office, there is no place to go....But I was not coming back into a situation where we had been before, not the same job in the same location. It was just another of a series of moves."

The role of expectations appears to be crucial in regards to both going and returning. However, there may well be a correlation between the importance people give to expectations and their flexibility and tolerance of
incongruity. For example, expectations may be more important to people with low tolerance of incongruity, low GIAL scores, and less important to those who enjoy the ambiguity.

3.c. Master of two worlds

"Freedom to pass back and forth across the world division, from the perspective of the apparitions of time to that of the causal deep and back - not contaminating the principles of the one with those of the other, yet permitting the mind to know the one by virtue of the other - is the talent of the master. The Cosmic Dancer, declares Nietzsche, does not rest heavily in a single spot, but gaily, lightly, turns and leaps from one position to another. It is possible to speak from only one point at a time, but that does not invalidate the insights of the rest. (Campbell, 1968, p. 229)

Campbell is talking about universalistic spiritual truths in this passage, but we can apply the "master of two worlds" metaphor to the expatriates' biculturalism. Their understanding of two cultures is one of the boons they can bring back to their parent companies and to the larger society. And in fact, tapping into the knowledge that people are basically alike all over the world, despite their cultural differences, did seem to be one of the most significant learnings for the expatriates.

One of the positive findings about reentry for this sample is that most of them (65.7%) do get to use the skills they learned abroad. Another 17.1% specified that it is only the interpersonal skills that they still use.
Interpersonal skills are another boon that expatriates bring back with them. Many of them reported that they became better listeners while they were abroad because it was a necessity to understand what was occurring.

Are expatriates heroes in their own companies? In keeping with Campbell's findings about the hero myths, some are and some are not. Those who are clearly not heroes are those who were either demoted or put in a lateral position upon their return. They were bitter about this situation and seemed to think a promotion was warranted. Certainly a promotion would be more in keeping with the mastery and heroism the experience seems to evoke in people. Those who had interpreted their "call" as a sign that they were "fast-trackers" had special difficulty making any meaning of their experience if the company did not use their expertise upon reentry.

"[IS IT A DISAPPOINTMENT THAT YOU DON'T GET TO USE THE SKILLS YOU LEARNED ABROAD?] Yes. I mean it is good for people to have the experience, but nothing is ever made of it. Then it kind of seems, not pointless because you have a broader background, but it seems to me that they could have made better use of whatever you might have learned or gained."

"People don't listen even when it has to do with work. Because you were over there, what you say should be even more valid, especially in this company, but it's not. My biggest frustration is that the company hasn't used the expertise I gained abroad. Not the technical expertise because I had that when I went over, but the social expertise. I formed a network of associates which was necessary for you and them to do the job and that's valuable. But if you
don't use the network, it goes away....Now I feel frustrated and let down. I thought people who went over and came back were put into useful jobs. Some of the [returnees] have left the company for that very reason....I could be very useful in a liaison job with Britain but I doubt I would ever be considered....If you got to use the skills you developed abroad, you could make sense of the experience. As it is, you're left hanging."

The preceding quotes highlight a key problem of repatriation. If the companies do not realize that the expatriates have indeed changed abroad, if they ignore the significance of the overseas experience to the expatriates, and if they ignore the boons the expatriates bring back with them, repatriation will be very frustrating.

For those who were seen as heroes in their companies, what are the boons they brought back that could be contributed to the company? In addition to an understanding of the other culture(s) and their way(s) of doing business, the expatriates have a broader perspective on the world, and often a broader exposure to business that could be used to guide the company. Those expatriates who were allowed to assume responsibilities abroad that they would not be given at home are clearly more well-rounded when they return. The networks of work relationships, described in a preceding quote, are another example of a boon they bring back. Improved managerial skills and interpersonal skills are major ways in which they changed abroad. The initiative most of them had to show abroad and the sense of mastery and self-efficacy they achieved should
result in employees who are capable of assuming responsibility for difficult assignments. Another boon is the ability to adapt to changes. And finally, the ability to see paradox implies a degree of cognitive complexity that should allow the returned expatriate to see more sides of issues and possibly be more creative in thinking of alternative actions.

One of the best ways to gauge the significance of the overseas experience and to find out what they miss about it is to ask expatriates if they would like to go abroad again. Twenty one interviewees (60.0%) immediately said they would go again. Two (5.7%) said they would not while 12 (34.3%) said it would depend on factors such as the job, site, and their family. The following quotes explain why these subjects would want to return abroad.

"I'd like to go abroad again...somewhere down the road because it is an exciting experience and you feel special in a way living abroad. And of course you just get a chance to do things that you cannot do in the States....And you feel like you can represent a lot more than just yourself when you are there and it is interesting to do that and challenging to do that. And it is nice to be challenged, even in your own individual way. Not just the business. So I guess that's one way to feel special."

"I think it would be fun to go again. The moving and the excitement of finding a new place. Seeing new things is part of it. The money is part of it. It is good financially, it wouldn't hurt to have more of that if it were a good job. If the challenge were there. I like the entrepreneurialship of working overseas. Being your own boss within guidelines."
"[We'd go again] because we enjoy the challenge. We enjoy seeing new countries, new languages...If the right opportunity came along, we wouldn't hesitate long at all."

"I'd go in a minute. I'm not sure I'd want to go to Europe again. I'd like to go to Asia. I'm getting to the end of my life...and I'd like to make the best of what's left."

Repatriation and the inevitable comparisons with their overseas life reveal the essence of the expatriate experience - feeling "special", more alive, more challenged, and more heroic. The challenge for companies is to recreate that experience for the expatriates in the parent company.
CHAPTER V

QUANTITATIVE RESULTS AND DISCUSSION

Overview

Whereas the previous chapter was organized around the metaphor of the hero's adventure, the metaphor of paradox is the focus of this chapter. This chapter will provide information regarding the quantitative results of the study and an analysis of the data. Statistical procedures that were performed to clarify the findings will be discussed, as will possible explanations for the findings. Data will be summarized in tabular form where appropriate. For all the statistical procedures reported, the sample group of returned expatriates was comprised of 35 subjects, unless otherwise noted. Because of the small sample size, correlations that approximate significance (p => .10) are routinely reported, but always with the caveat that they approximated significance or were almost significant.

Only two of the 35 subjects were female. A profile of the average or modal subject is a male, currently 41.2 years of age. He was 35.7 years old and had 1.3 children
at the time of the overseas assignment. He is married to an American. He has an undergraduate degree in engineering and a master's degree in business. He is a general manager by job function and works for a chemical firm. Although he may have traveled abroad extensively for his company, he had never lived abroad before. Prior to accepting an assignment in Europe, he had worked for his company 7.9 years. He worked at a regional headquarters, which employed 21-100 employees, as a general manager for 3.9 years. He speaks one foreign language, but with limited fluency. He became aware of certain paradoxes abroad and felt he had changed as a result of his cross-cultural experience. Returning home was difficult. Although he was ready to return to the U.S. when he did, he would like to accept another international assignment in the future.

The purpose of the quantitative portion of this study is to (1) learn more about the incidence of paradox among business people; (2) examine the relationship between the awareness of paradox and cultural involvement factors that might affect its perception; (3) ascertain whether people who experience the paradoxes do indeed possess the three competencies; and (4) determine whether a positive relationship exists between the awareness of paradox, and acculturation and effectiveness.
The chapter will be arranged in four sections. The first section presents the expatriates' experience or awareness of the paradoxes. The second section focuses upon the relationship between factors that determine cultural involvement and the awareness of paradox. The third section examines the relationship between the awareness of paradox and the competencies. The fourth section investigates the relationship between awareness of paradox and acculturation, and effectiveness. Each section will summarize the findings as they relate to the study's quantitative hypotheses:

H1: There will be a positive relationship between awareness of paradox and the degree of cultural involvement.
H2: There will be a positive relationship between awareness of paradox and the three competencies.
H3: There will be a positive relationship between awareness of paradox and acculturation.
H4: There will be a positive relationship between awareness of paradox and effectiveness.

I. The Awareness of Paradox

The following results were obtained in order to answer the research question, "Do expatriate business people experience paradoxes and, if so, what are they?". Table
5.1 shows the total number of paradoxes the subjects reported on the paradox instrument. The average was 5.43 (SD=2.06). Table 5.2 presents the number of subjects who acknowledged experiencing the individual paradoxes while they were living abroad. The percentages of subjects who reported each paradox ranged from 46-77%. Table 5.2 also presents the ranking of the paradoxes in terms of their significance to the expatriates.
Table 5.1
Total Number of Reported Paradoxes

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<td>22</td>
<td>62.9</td>
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</table>
Throughout this section, the paradoxes will be referred to as Paradox 1-9 (the order in which they appear on the instrument); at times they will be accompanied by a brief label to help the reader follow the analysis. To orient the reader, the following list presents the way the paradoxes will be referred to in this chapter, the percentage of expatriates who experienced them, followed by the form in which they appear on the instrument.

Paradox 1 – Powerful/powerless (68.6%)

Possessing a great deal of power as a result of your role but downplaying it inorder to gain necessary input and cooperation.

Paradox 2 – Positive regard/caution (54.3%)

Generally thinking well of the host country nationals while at the same time being very savvy about being taken advantage of by them.

Paradox 3 – HQ/HC demands (51.4%)

Feeling caught between contradictory demands of the headquarters on the one hand and the demands of the host country nationals and the local situation on the other.

Paradox 4 – Stereotype/individual differences (77.1%)

Seeing as valid the general stereotype about the culture you lived in but also realizing that many host country nationals do not fit that stereotype.

Paradox 5 – Relinquish/strengthen values (60.0%)
Giving up some of your American values in order to be accepted or successful in the other culture while at the same time finding some of your core American values becoming even stronger as a result of exposure to another culture.

**Paradox 6 - At ease anywhere/belonging nowhere** (45.7%)

As a result of being abroad a long time, feeling at ease anywhere but belonging nowhere.

**Paradox 7 - Macro/micro perspective** (48.6%)

Becoming more "world-minded" as a result of exposure to different values and conflicting loyalties, but becoming more idiosyncratic as to how you put together your won value system and view on life.

**Paradox 8 - Ideal/real values** (54.3%)

Trying to represent your company as best you can in order to succeed but also realizing that the "ideal" values you act out abroad may not exist back at Headquarters.

**Paradox 9 - Free/not free of norms** (62.9%)

Being freed from many of your own cultural rules and even from some of the host culture's norms but not being free at all from certain host country customs which you must observe in order to be effective.

The intercorrelations among the 9 paradoxes are shown in Table 5.3. A moderate relationship exists between Paradox 3 and 4 (r=.29). Relationships that almost reach
significance occur between Paradox 4 and both Paradox 5 and 6 (r=.25, and r=.23, respectively). Paradox 5 and 6 are moderately correlated (r=.28), as are Paradox 6 and 7 (r=.33). Paradox 8 correlates strongly with both Paradox 3 and 4 (r=.60 and r=.46, respectively). Furthermore, the relationship between Paradox 8 and 6 almost approaches significance (r=.27). Paradox 9 correlates moderately with Paradox 6 (r=.35) and strongly with Paradox 8 (r=.48). Interestingly, the total number of paradoxes reported correlates strongly with all but the first two paradoxes. Paradox 1 and 2 do not correlate with any others and a review of their content indicates that these paradoxes stand alone. Paradoxes 3, 4, and 8 seem to share a theme of cognitive complexity. The common theme among Paradoxes 5, 6, 7, and 9 appears to be identity integration; Paradox 8 could also be included in this grouping.
**Table 5.3**  
Intercorrelations of Paradoxes

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<td>.62**</td>
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</table>

N = 35
.10 = +
.05 = *
.01 = **
The paradox instrument was factor analyzed using a principal component factor analysis procedure with a varimax rotation of factors. It yielded 4 factors, all of which had eigenvalues greater than 1. Table 5.4 presents these factors. The first factor, which accounts for 27.9% of the variance, consists of Paradoxes 8 (ideal/real values), 3 (Hq/national demands), and 9 (free/not free of norms). It has been labeled **Freedom/Constraint**. The second factor accounts for 15.5% of the variance and is composed of Paradoxes 5 (relinquish/strengthen values) and 7 (macro/micro perspective); it has been labeled **Value Dimension**. The third factor accounts for 12.4% of the variance and is comprised of Paradoxes 2 (positive regard/caution) and 6 (at ease anywhere/belonging nowhere). This third factor is labeled **Trust/Mistrust**. The fourth and final factor accounts for 11.4% of the variance and consists of Paradoxes 1 (powerless/powerful) and 4 (stereotype/individual differences); it has been labeled
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<th>Paradoxes</th>
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<th>II Value Dimension</th>
<th>III Trust Mistrust</th>
<th>IV Social Acuity</th>
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<td>7. Macro/Micro Perspective</td>
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<td>8. Ideal/Real Values</td>
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<tr>
<td>9. Free/Not Free of Norms</td>
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<td>.63</td>
</tr>
</tbody>
</table>
Social Acuity.

The additional paradoxes which the expatriates identified are included in Chapter IV, Qualitative Description and Interpretation, which also contains qualitative descriptions of the nine paradoxes in the instrument.

In summary, the answer to the second research question, "Do expatriate business people experience paradoxes?" is yes. Since the least commonly reported paradox was experienced by at least 46% of the subjects, this indicates that the list of explicated paradoxes or contradictions does have relevancy for expatriate business people.

II. H1: Cultural Involvement and the Awareness of Paradox

The second purpose of the quantitative analysis was to test the first hypothesis and determine whether the awareness of paradox is related to factors that affect cultural involvement. Cultural involvement refers to "the extent to which the expatriate 'enters' the other culture or is in an interdependent relationship at work." The first hypothesis predicts that there will be a positive relationship between these two factors. The individual items that comprise the cultural involvement category are
divided into three subgroups: work-related factors, cultural factors, and personal factors.

**Intercorrelations among Work-related Variables**

The means for these variables are presented in Table 5.5. Their intercorrelations appear in Table 5.6. Some of these variables are presence/absence variables because they are derived from both exclusive and non-exclusive nominal categories; type of facility, reason for assignment, job function, and job type are presence/absence variables.

The subjects described their job function or role abroad as fitting one of more of the following categories: managing director, functional head, technical advisor, trouble shooter, operative, and researcher. The following findings indicate how these functions are or are not combined in this sample. The trouble shooter and managing director role are not usually performed by the same person \((r=-.33)\). However, both the trouble shooter and researcher roles are found in combination with the technical advisor function \((r=.38)\). There is a strong negative correlation between the roles of operative and functional department head \((r=-.43)\).
Table 5.5
Means of Work-Related Cultural Involvement Variables
(N = 35)

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### TABLE 5.6

**INTERCORRELATIONS AMONG WORK-RELATED CULTURAL INVOLVEMENT VARIABLES**

**Work-Related Factors**

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**Note:**

- N = 35
- .10 = +
- .05 = *
- .01 = **
The size of the facility (number of employees) has some impact on the type of roles performed. The managing director function correlates negatively to a moderate degree \( (r = -0.37) \) with the size of the facility, (number of employees). There is a strong relationship between the researcher role and size of facility \( (r = 0.53) \) since it was primarily the organizations with large overseas R&D technical centers in this study that sent researchers abroad.

The reason for the overseas assignment is another group of non-exclusive categories; it consists of the following presence/absence variables: initiation activity (either a startup operation or a special assignment to complete a specific non-routine task), management development of the expatriate, unavailability of either local management expertise or technical expertise, and the need to maintain a foreign image. There were strong negative correlations between the management development reason for the assignment and the unavailability of both local management and technical expertise \( (r = -0.54 \text{ and } r = -0.31) \text{, respectively} \). As expected, initiation activity was strongly correlated \( (r = 0.52) \) with the phase of the organization (established or start-up). Initiation activity was negatively correlated with the role of technical advisor \( (r = -0.32) \). The management development
motive for the assignment correlates with the number of third country co-workers (r = .30). There are moderate correlations between unavailability of local management expertise and both size (r = -.31) and organizational phase (r = -.29). As would be expected, there are strong positive correlations between unavailability of local management expertise and the roles of both managing director (r = .39) and functional department head (r = .35). In contrast, there are strong negative correlations with the roles of operatives and researchers (r = -.36 and r = -.33, respectively). The unavailability of local management expertise also correlates with number of host country direct reports (r = .37), and degree of customer contact (r = .34), and the technical advisor role (r = .45). The need to maintain a foreign image was negatively correlated with the size of the facility (r = -.31).

A job type category was created to operationalize the degree of involvement with the other culture that is determined primarily by the type of industry. The three types are research jobs (low involvement), service industry jobs (medium involvement), and finally, sales and manufacturing jobs (high involvement). Each job type is a separate presence/absence variable. Only those relationships that are not obvious, i.e., research with researchers and R&D labs, will be reported in the text.
The sales/manufacturing job type is strongly negatively correlated with size of the facility \((r=-.43)\) and positively correlated with the managing director function \((r=.57)\). Positive correlations of similar strength, both of which only approximate significance, exist between sales/manufacturing and initiation activities \((r=.24)\) and the lack of local management expertise \((r=.24)\), findings that relate to the high correlation with the managing director role. There is a positive relationship with the degree of customer contact \((r=.34)\). There is a positive correlation between sales/manufacturing type jobs and the number of host country coworkers \((r=.24)\), that is almost significant. A negative correlation with the number of third country coworkers \((r=-.24)\) also approximates significance.

Service jobs (banking, accounting) are positively correlated with corporate/regional headquarters \((r=.26)\), the technical advisor function \((r=.24)\), and the lack of local technical expertise \((r=.26)\), but these relationships are only significant at the \(p=>.10\) level.

The negative relationships between research jobs and both the degree of customer contact \((r=-.42)\) and the number of host country coworkers \((r=-.31)\) support the assumption that this type of job has the least cultural involvement. The number of host country direct reports correlates
negatively with the size of the facility \((r=-.31)\). This may be explained by the negative correlation between the number of host country direct reports and the role of researcher \((r=-.33)\) since many of the researchers worked in large facilities and had no supervisory responsibility. In contrast, the degree of local supervision correlates moderately with initiation activity and the unavailability of local management expertise as the reason for the assignment \((r=.28\) and \(r=.37\), respectively). The type of job also correlates with the number of host country subordinates; the sales and manufacturing category has significantly more host country direct reports \((r=.44)\) than the service or research categories, supporting the rationale for assuming the sales and manufacturing result in high involvement.

There are many correlations for the customer contact variable because it is determined in part by the expatriate’s function and reason for the assignment. There is a strong negative correlation between customer contact and the size of the facility \((r=-.65)\). Strong positive correlations exist between customer contact and the managing director role \((r=.40)\), the unavailability of local management expertise \((r=.34)\), the need to maintain a foreign image \((r=.29)\), and the number of direct host country reports \((r=.52)\). Customer contact is also
positively correlated with the number of third country co-workers ($r = .30$). Customer contact is strongly correlated in a positive direction with the sales and manufacturing type of job ($r = .34$). It comes as no surprise that customer contact is negatively correlated with the role of researcher ($r = -.46$), given the absence of relationship between the researcher role and other functions.

The number of host country co-workers is positively correlated with the organizational phase ($r = .34$), the role of functional department head ($r = .29$), initiation activity ($r = .47$), and the number of direct host country reports ($r = .55$). There is a significant relationship between the number of third country co-workers and the role of operative ($r = .36$) and the management development rationale for the assignment ($r = .30$). A negative relationship exists between the number of third country co-workers and initiation activity ($r = -.28$) and research type jobs ($r = -.31$). A positive relationship with sales and manufacturing type jobs is almost significant ($r = .24$).

In summary, we find a good deal of shared variance among these work-related factors, but not enough to allow them to substitute for one another when we examine their relationship with the paradoxes. Table 5.7 indicates the relationships between the work-related factors and both
individual paradoxes and the total number of paradoxes.
These are presented in the next section.
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Note: N = 35

.10 = +

.05 = *

.01 = **
Correlations among Work-related Variables and Awareness of Paradox.

Paradox 1 (Powerful/powerless) has the highest number of statistically significant and almost statistically significant correlations. It correlates negatively to a strong degree with size of the facility (r = -0.52). This may be explained by another negative correlation with the researcher role (r = -0.35) and R&D labs (r = -0.35), since researchers were found in very large facilities and wielded little supervisory responsibility. Although Paradox 1 did not correlate significantly with organizational phase, there is a significant relationship with initiation activity (r = 0.34). There are moderate to strong correlations with the following factors: the managing director role (r = 0.28), the number of host country direct reports (r = 0.45), the degree of customer contact (r = 0.45), and sales and manufacturing jobs (r = 0.36). The work-related factors that correlate significantly seem to share the theme of hands-on management. Therefore, it is not surprising that the relationship with the unavailability of local management expertise as a reason for the assignment almost reached significance (r = 0.23) and may have done so with a larger sample. In the opposite direction, a negative correlation with the role of technical advisor also approximated significance (r = -0.25). These findings support the
researcher's prediction that the experience of this paradox would most likely occur among people with direct management responsibility who exercise power.

Paradox 2 (Positive regard/caution) is significantly correlated only with the necessity to maintain a foreign image as a reason for the assignment ($r = .42$). There is a positive relationship with R&D labs ($r = .27$) and a negative relationship with corporate/regional headquarters ($r = -.25$) that are almost significant.

Paradox 3 (HQ/RC demands) is significantly correlated with initiation activity ($r = .34$). A possible explanation for this finding is that initiation activities often involve ad hoc relationships with headquarters. This category consists of people who are setting up companies, plants, or offices or who have been assigned a specific task that falls outside the normal organizational hierarchy. Some of the subjects in this category reported that they were claimed by several departments since they fell into the cracks of the organization. Another interpretation of this finding is that initiation activities require greater negotiation and perhaps a closer involvement with the local culture because there is not an existing organizational structure to mediate for the expatriate. In this case, closer involvement may lead to more cognitive complexity and awareness of host country
demands. A positive relationship also exists with corporate/regional headquarters facilities but it only approaches significance ($r=.26$). The relationship between Paradox 3 and the number of third country co-workers and with manufacturing/plant division facilities are almost significant in the negative direction ($r=-.26$, and $r=-.23$, respectively).

**Paradox 4 (Stereotypes/individual differences)** correlates negatively to a strong degree with the role of technical advisor and with manufacturing/plant division facilities ($r=-.41$). The positive relationship with initiation activity is almost significant ($r=.27$), as is the negative relationship with the lack of local technical expertise as a reason for the assignment ($r=-.23$).

**Paradox 5 (Relinquish/strengthen values)** is moderately correlated with the lack of local technical expertise ($r=.30$) and the research job type ($r=.33$). It is strongly positively correlated with the R&D facilities ($r=-.37$), which explains the almost significant relationship with the size of the facility ($r=.24$). This paradox is negatively related to both initiation activity ($r=-.32$) and the number of host country direct reports ($r=-.32$). The negative correlation with sales and manufacturing jobs is almost significant ($r=-.27$). One possible explanation for these
relationships is that technical advisors often have to gain acceptance and promote their skills, much like a staff person or auditor in this country, so they may be more realistic about the need to adapt oneself to gain acceptance. If an expatriate had no direct reports, there could also be less need to win this acceptance.

Paradox 6 (At ease anywhere/belonging nowhere) has only one statistically significant correlation with the work related factors. A positive correlation exists with the lack of local technical expertise as a reason for the assignment (r=.38). The relationships with the number of third country co-workers and the corporate/regional headquarters are almost significant (r=.24, and r=.25, respectively). The same is true of the relationship between paradox 6 and the R&D lab facility, although in a negative direction (r=-.27).

Paradox 7 (Macro/micro perspective) is strongly correlated with the role of technical advisor (r=.40) and the number of third country co-workers (r=.36). It correlates moderately with the unavailability of local technical expertise (r=.32). A moderate negative correlation exists with initiation activity (r=-.34) and an almost significant relationship with the number of host country co-workers (r=-.22). Positive correlations are
almost significant for both the country service branch facility \(r=0.23\) and the trouble shooter role \(r=0.26\).

Paradox 8 (Ideal/real values) is positively correlated with organizational phase \(r=0.28\) and initiation activity \(r=0.32\), which means it is more common for people involved in establishing companies. This role requires putting the company's best foot forward and presenting an ideal to gain acceptance. It is also positively correlated with the operative role \(r=0.32\) which includes some subjects who are performing a function in an isolated situation where they would also feel the need to represent the home office. Surprisingly, there is no relationship between this paradox and the role of managing director. Overseas directors are often placed in the position of representing ideals but these results indicate that it is the start-up managers and the lone representatives who feel this paradox most strongly. Paradox 8 is negatively correlated with the unavailability of local management \(r=-0.30\).

Paradox 9 (Free/not free of norms) is strongly correlated with the operative role \(r=0.38\), the unavailability of local technical expertise \(r=0.36\), and the need to maintain a foreign image \(r=0.35\). Positive relationships with the role of technical advisor and the country service branch approximated significance \(r=0.22\, and\, r=0.24\), respectively).
The Total Number of Paradoxes is significantly correlated only with the unavailability of local technical expertise \((r=.31)\). A positive relationship with the need to maintain a foreign presence \((r=.24)\) is almost significant. Negative relationships with the role of trouble shooter \((r=-.23)\) and the manufacturing/plant division also approximate significance.

The relationships between the paradox factors and the work related cultural involvement variables appear in Table 5.8. The Freedom/Constraint Factor correlates significantly with both the operative function \((r=.38)\) and lack of local technical expertise as a motive for the assignment \((r=.29)\). Not surprisingly, it correlates negatively with the lack of available local technical expertise \((r=-.27)\).
### TABLE 5.8
CORRELATION AMONG WORK RELATED CULTURAL INVOLVEMENT VARIABLES
AND PARADOX FACTORS

<table>
<thead>
<tr>
<th>Work-Related Factors</th>
<th>Freedom/Constraint</th>
<th>Value Dimension</th>
<th>Trust/Mistrust</th>
<th>Social Acuity</th>
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<tr>
<td><strong>Type of Facility:</strong></td>
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<tr>
<td>Corporate/regional HQ</td>
<td>.08</td>
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<td>.00</td>
<td>.28**</td>
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<td>Country service branch</td>
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<td>.04</td>
<td>.11</td>
<td>.09</td>
</tr>
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<td>R&amp;D technical center</td>
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<td>.23**</td>
<td>.00</td>
<td>-.2**</td>
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<tr>
<td>Manufacturing</td>
<td>-.11</td>
<td>-.23**</td>
<td>-.11</td>
<td>-.24**</td>
</tr>
<tr>
<td><strong>Size of Facility</strong></td>
<td>-.03</td>
<td>.05</td>
<td>-.09</td>
<td>-.41**</td>
</tr>
<tr>
<td><strong>Organizational phase</strong></td>
<td>.21</td>
<td>-.22**</td>
<td>.10</td>
<td>-.01</td>
</tr>
<tr>
<td><strong>Reason for Assignment:</strong></td>
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<td></td>
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<tr>
<td>Initiation activity</td>
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<td>-.41**</td>
<td>.00</td>
<td>.42**</td>
</tr>
<tr>
<td>Management development</td>
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<td>-.03</td>
<td>.00</td>
<td>.06</td>
</tr>
<tr>
<td>No local mgmt. expertise</td>
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<td>.07</td>
<td>.00</td>
<td>.14</td>
</tr>
<tr>
<td>No local tech. expertise</td>
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<td>.38**</td>
<td>-.08</td>
<td>-.24**</td>
</tr>
<tr>
<td>Need to maintain foreign</td>
<td>.12</td>
<td>.36**</td>
<td>-.09</td>
<td>-.29**</td>
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<tr>
<td><strong>Job Type:</strong></td>
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<td></td>
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<tr>
<td>Research</td>
<td>.04</td>
<td>.26**</td>
<td>.13</td>
<td>-.29**</td>
</tr>
<tr>
<td>Service</td>
<td>.03</td>
<td>.03</td>
<td>.00</td>
<td>-.02</td>
</tr>
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<td>Sales/manufacturing</td>
<td>-.06</td>
<td>-.23</td>
<td>-.1</td>
<td>.23**</td>
</tr>
<tr>
<td><strong>Job Function:</strong></td>
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<td>Managing Director</td>
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<td>-.04</td>
<td>-.13</td>
<td>.22</td>
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<td>Functional head</td>
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<td>-.02</td>
<td>.00</td>
<td>.19</td>
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<td>Technical advisor</td>
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<td>.17</td>
<td>-.2</td>
<td>-.45**</td>
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<tr>
<td>Trouble-shooter</td>
<td>-.18</td>
<td>.06</td>
<td>-.08</td>
<td>.05</td>
</tr>
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<td>Operative</td>
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<td>-.05</td>
<td>-.11</td>
<td>-.02</td>
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<td>Researcher</td>
<td>.12</td>
<td>.23**</td>
<td>.24**</td>
<td>-.32**</td>
</tr>
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<td><strong>Customer Contact</strong></td>
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<td>-.04</td>
<td>.09</td>
<td>.42**</td>
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<td>No. of Direct HC Reports</td>
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<td>-.25**</td>
<td>.00</td>
<td>.27**</td>
</tr>
<tr>
<td>No. of HC Co-workers</td>
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<td>-.19</td>
<td>.09</td>
<td>.13</td>
</tr>
<tr>
<td>No. of Third Country Co-work</td>
<td>-.08</td>
<td>.18</td>
<td>-.12</td>
<td>.00</td>
</tr>
</tbody>
</table>

**Note:**
- N = 35
- .10 = *
- .05 = **
- .01 = ***
The Value Dimension Factor correlated to a statistically significance degree with lack of local technical expertise as a rationale for the assignment ($r = .38$). It is negatively correlated with initiation activities ($r = .41$). There are numerous correlations with this factor that are almost significant. In the positive direction, a relationship exists with R&D labs ($r = .23$), the research function ($r = .26$), and the research job type ($r = .23$). Obviously all three correlations are measuring the same subgroup. Negative correlations that approach significance exist between this value dimension and the organizational phase ($r = -.22$), manufacturing facilities ($r = -.23$), sales/manufacturing jobs ($r = -.23$), and the number of direct host country reports ($r = -.25$). This might indicate that, this study at least, Lee and Larwood's (1983) hypothesis that manufacturing people are more likely than those in other overseas occupations to take on the values of the other culture.

The Trust/Mistrust Factor is correlated positively with the need to maintain a foreign image abroad as a reason for the assignment ($r = .36$). There were two correlations that approached significance, a negative one with the trouble shooter function ($r = -.28$) and a positive one with the researcher function ($r = .24$).
The Social Acuity Factor has the largest number of significant correlations. It is positively correlated with the degree of customer contact ($r=.42$) and initiation activity ($r=.42$). It is negatively correlated to a strong degree with the technical advisor role ($r=-.45$) and the size of the facility ($r=-.41$) There are moderate negative correlations with the research job type ($r=-.29$) and the researcher function ($r=-.32$). There is a relationship with the manufacturing/plant division that approaches significance in the negative direction ($r=-.24$). The relationship with the lack of local technical expertise was almost significant in the negative direction ($r=-.24$). The relationship between awareness of this factor and expatriates in sales and manufacturing jobs was almost significant ($r=.23$), as was the relationship with corporate/regional headquarters facilities ($r=.28$) and the number of direct host country reports ($r=.27$). This factor seems to be influenced by occupation; the findings appear to reinforce the stereotype of the researcher or engineer who is less tuned into social cues.

**Intercorrelations among Cultural Factors**

The second category of cultural involvement factors consists of two variables - cultural similarity and the presence of a cultural mentor. Cultural similarity refers
to the degree to which the foreign culture resembles one's own culture in language, religion, and economic development. The means for these two variables are included, along with those of the third category, Personal Factors, in Table 5.9. Cultural similarity and the presence of a cultural mentor are not significantly intercorrelated ($r=.06$).
Table 5.9
Means Table for Cultural Involvement Factors: Personal and Cultural Factors

<table>
<thead>
<tr>
<th>Cultural Factors</th>
<th>No. of Subjects</th>
<th>M</th>
<th>SD</th>
<th>N</th>
</tr>
</thead>
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<td>1.15</td>
<td>35</td>
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<tr>
<td>Cultural Mentor</td>
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<td>1.40</td>
<td>.55</td>
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**Personal Factors**

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<th>Occupation:</th>
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<tr>
<td></td>
<td>General Manager</td>
<td>13</td>
<td>.37</td>
<td>.49</td>
</tr>
<tr>
<td></td>
<td>Engineer/Chemiast</td>
<td>7</td>
<td>.20</td>
<td>.41</td>
</tr>
<tr>
<td></td>
<td>Auditor</td>
<td>5</td>
<td>.14</td>
<td>.36</td>
</tr>
<tr>
<td></td>
<td>Banker</td>
<td>4</td>
<td>.11</td>
<td>.32</td>
</tr>
<tr>
<td></td>
<td>Lawyer</td>
<td>3</td>
<td>.09</td>
<td>.28</td>
</tr>
<tr>
<td></td>
<td>Accountant</td>
<td>3</td>
<td>.09</td>
<td>.28</td>
</tr>
<tr>
<td>Age at Posting</td>
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<td>.82</td>
<td>35</td>
</tr>
<tr>
<td>Number of Children</td>
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<td>1.29</td>
<td>1.15</td>
<td>35</td>
</tr>
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<td>Previous Overseas Experience</td>
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<td>.94</td>
<td>35</td>
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<tr>
<td>Number of Countries Lived In</td>
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<tr>
<td>Tenure of Company Employment Prior to Posting</td>
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<td>5.83</td>
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<tr>
<td>Previous International Travel</td>
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<td>1.51</td>
<td>.51</td>
<td>35</td>
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<tr>
<td>Desire to Go Abroad</td>
<td></td>
<td>1.23</td>
<td>.49</td>
<td>35</td>
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<td>Length of Time Abroad</td>
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<td>1.91</td>
<td>1.12</td>
<td>35</td>
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<td>Number of Foreign Languages Spoken</td>
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<td>35</td>
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<tr>
<td>Language Effort</td>
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<td>.74</td>
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<td>Language Fluency</td>
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<td>1.34</td>
<td>1.00</td>
<td>35</td>
</tr>
</tbody>
</table>
Correlations among Cultural Factors and Awareness of Paradox

Since there are relatively few correlations with this category, these results will be organized in terms of the two cultural factors rather than the individual paradoxes. These findings are presented in Table 5.11.

The cultural similarity variable correlates strongly with Paradox 2 (Positive regard/caution) \( (r=-.34) \). One explanation which is supported by the qualitative data is that subjects in Latin America and Asia felt more need to be savvy about being taken advantage of than did expatriates in Europe. It is impossible to ascertain whether this relates to the real possibility of being cheated or is merely a reflection of dealing with cultures that are very dissimilar and not easily decoded. The latter explanation is perhaps supported in the finding that significance is approximated in the negative relationship with Paradox 4 (Stereotyping/individual differences) \( (r=-.22) \). Cultural similarity correlates significantly to a moderate degree with Paradox 5 \( (r=-.29) \) and Paradox 6 \( (r=-.30) \). That indicates that people in dissimilar cultures are less likely to experience these paradoxes.
TABLE 5.11

CORRELATION AMONG CULTURAL AND PERSONAL FACTORS OF CULTURAL INVOLVEMENT AND AWARENESS OF PARADOX

<table>
<thead>
<tr>
<th>CULTURAL FACTORS</th>
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<th>#4</th>
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<th>#7</th>
<th>#8</th>
<th>#9</th>
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<td>.00</td>
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<td>-.30*</td>
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<td>-.02</td>
<td>.22+</td>
<td>-.15</td>
<td>.06</td>
<td>-.61**</td>
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<td>-.39*</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Age at posting</td>
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<td>.03</td>
<td>-.11</td>
<td>-.23+</td>
<td>-.40**</td>
<td>-.1</td>
<td>-.39*</td>
<td>-.32*</td>
<td>-.26+</td>
<td>-.35*</td>
</tr>
<tr>
<td>No. of children</td>
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<td>-.01</td>
<td>-.16</td>
<td>.05</td>
<td>-.13</td>
<td>.06</td>
<td>.13</td>
<td>.04</td>
<td>.11</td>
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<td>.01</td>
<td>.34*</td>
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</tr>
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<td>.33*</td>
<td>-.22+</td>
<td>-.14</td>
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<td>.07</td>
<td>.37*</td>
<td>-.05</td>
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<td>-.03</td>
<td>-.04</td>
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</tr>
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<td>Previous int'l travel</td>
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<td>-.14</td>
<td>.02</td>
<td>.37*</td>
<td>-.03</td>
<td>.03</td>
<td>-.2</td>
<td>-.08</td>
<td>-.05</td>
</tr>
<tr>
<td>Desire to go abroad</td>
<td>.07</td>
<td>-.16</td>
<td>-.01</td>
<td>.12</td>
<td>-.22</td>
<td>.04</td>
<td>.01</td>
<td>.08</td>
<td>-.25+</td>
<td>-.04</td>
</tr>
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<td>Length of time abroad</td>
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<td>.24+</td>
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<td>.23+</td>
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<td>-.01</td>
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</tr>
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<td>.02</td>
<td>-.15</td>
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<td>-.09</td>
<td>.03</td>
<td>-.17</td>
<td>.28*</td>
<td>.09</td>
<td>.05</td>
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<td>-.01</td>
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<td>-.01</td>
<td>-.02</td>
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<td>-.21</td>
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<td>.19</td>
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<td>-.13</td>
<td>.30*</td>
<td>.17</td>
<td>.04</td>
<td>.13</td>
<td>-.09</td>
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<td>-.13</td>
<td>-.11</td>
<td>-.56**</td>
<td>-.38*</td>
<td>-.28+</td>
<td>-.09</td>
<td>-.33*</td>
<td>-.19</td>
<td>-.57**</td>
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</tbody>
</table>

Note:  N = 35
.10 =  +
.05 = *
.01 = **
The **cultural mentor** variable signifies the presence or absence of a person who explains the local culture to the expatriate. Absence of a mentor is reflected by a higher value. A very strong negative correlation exists with Paradox 7 (Macro/micro perspective) \((r=-.61)\). Negative relationships are also found with Paradox 9 (Free/not free of norms) and the total number of paradoxes \((r=-.30 \text{ and } r=-.39, \text{ respectively})\). This variable is negatively related to Paradox 4 (Stereotyping/individual differences) but at the .10 level of probability \((r=-.22)\). This appears to be evidence that a close personal relationship with a member of another culture is related to cultural understanding (evidenced in Paradox 4 and 9) and a broadened perspective (Paradox 7).

The only statistically significant correlation with the paradox factors, as indicated in Table 5.12, is a strong negative correlation with the Value Dimension (comprised of Paradoxes 5 and 7) \((r=-.47)\).

**Intercorrelations among Personal Factors**

The third and last category of factors which potentially influence awareness of paradox are personal and demographic factors. Table 5.9 lists these variables and their means. The intercorrelations for these factors are contained in Table 5.10 and indicate several significant
relationships among these variables. The description of these relationships is organized in the following manner: the section begins with the description of one cluster of highly inter-related variables and then presents the three individual variables that have the largest number of significant relationships—previous overseas experience, tenure with the company, and language effort—with their respective correlations.

Six variables are consistently related and provide a profile for a subgroup of the sample: previous overseas experience, number of countries lived in, tenure, length of time abroad, and number of children. Presumably these variables are identifying a small group of older expatriates, general managers with multiple experiences and wives who were not career women but mothers. This is supported by the positive correlation between the number of children and the number of countries lived in and length of time abroad (r=.38 and r=.36, respectively). However, there are few "career" expatriates in this study. Only three subjects had multiple assignments and spent significant portions of their career abroad (7, 17 and 19 years, respectively). The average length of tenure, the time employed by the company before the overseas assignment, is 7.9 years.
Table 5.10

Intercorrelations Among Cultural and Personal Factors of Cultural Involvement

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<th>14</th>
<th>15</th>
<th>16</th>
<th>17</th>
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<tbody>
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<td>1. Age at Posting</td>
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<tr>
<td>3. Previous Overseas Experience</td>
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<td></td>
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<td>.39***</td>
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<td>.41**</td>
<td>.32*</td>
<td>.36*</td>
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<td>-.32*</td>
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<td>-.38*</td>
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<tr>
<td>7. Desire to Go Abroad</td>
<td>-.07</td>
<td>-.07</td>
<td>-.11</td>
<td>-.07</td>
<td>.29*</td>
<td>-.13</td>
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<td>8. Length of Time Abroad</td>
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<td>.58**</td>
<td>.66**</td>
<td>.23*</td>
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<td>9. Number of Foreign Languages Spoken</td>
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<td>.23*</td>
<td>.30*</td>
<td>.29*</td>
<td>.15</td>
<td>-.13</td>
<td>-.03</td>
<td>.22*</td>
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<td>10. Language Effect</td>
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<td>.10</td>
<td>.04</td>
<td>.05</td>
<td>.11</td>
<td>-.27*</td>
<td>.22*</td>
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<tr>
<td>11. Language Fluency</td>
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<td>-.22</td>
<td>.34*</td>
<td>.39*</td>
<td>.34*</td>
<td>-.18</td>
<td>-.10</td>
<td>.34*</td>
<td>.73**</td>
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</table>

Occupation:

12. General Manager | .23* | .33* | .23* | .23* | .30* | -.32* | .37* | .11  | .15  | .09  | .09  |      |      |      |      |      |      |
13. Engineer/Chemist | -.19 | .00  | -.19 | -.20 | -.20 | -.24* | -.22 | .29* | .16  | .19  | -.38* |      |      |      |      |      |      |
14. Auditor | -.06 | -.29* | -.06 | .00  | .06  | .07  | -.02 | -.04 | -.25* | -.06 | -.06 | -.31* | -.20 |      |      |      |      |
15. Banker | -.13 | -.01 | -.13 | -.14 | -.19 | .35* | .02  | .11  | -.25* | -.08 | -.13 | -.28* | -.18 | -.15  |      |      |      |
16. Lawyer | .22  | -.08 | .22  | .19  | -.11 | -.11 | .14  | .02  | .09  | -.10 | -.00 | -.34* | -.15 | -.12  | -.11 |      |      |
17. Accountant | -.11 | .01  | -.11 | -.12 | -.23* | -.11 | .14  | .02  | -.17 | -.10 | -.21 | -.24* | -.15 | -.12  | -.11 | -.09 |      |

N = 25
.10 = *
.05 = **
.01 = ***
Previous overseas experience clearly tapped into the subgroup of long-term expatriates. Significant correlations exist with number of children \((r=.37)\), number of countries lived in \((r=.97)\), tenure \((r=.32)\), length of time abroad \((r=.59)\), number of foreign languages spoken \((r=.30)\), and degree of fluency \((r=.34)\). This variable was negatively related to previous international travel before the assignment \((r=-.32)\). Apparently the long term expatriates moved abroad at a fairly young age. This is substantiated by the negative correlation between the number of countries lived in and previous international travel \((r=-.36)\) and by the strong positive correlation between number of countries lived in and length of time abroad \((r=.66)\). The number of countries lived in was also positively correlated with number of foreign languages spoken \((r=.29)\) and language fluency \((r=.39)\).

Tenure with the company is significantly related to several variables: age at the time of the posting \((r=.34)\), previous overseas experience \((r=.32)\), number of foreign countries lived in \((r=.38)\), number of children \((r=.41)\), the general manager role \((r=.30)\), desire to go abroad \((r=.29)\), and language fluency \((r=.34)\). There was a negative correlation between tenure and previous international travel \((r=-.38)\). The banker occupation correlates strongly with previous international travel \((r=.35)\). Tenure and the
general manager role are the only variables that correlated significantly \( r = .29, r = .37 \), respectively) with the desire to go abroad.

*Language effort* which referred to the expatriates' self-reported attempts to learn the local language was not significantly correlated with any of the personal factors. However, the relationship with previous international travel approached significance but in a negative direction \( (r = -.27) \). Perhaps the world travelers had survived so long without learning another language that they did not feel the necessity when they were permanently assigned to one country. The relationship between language effort and the desire to go abroad was almost significant and confirms what I have seen abroad - in general, people make the effort to learn the language because they want to be there and like the local people. Surprisingly, language effort did not correlate significantly with language fluency. Language fluency does relate significantly with previous overseas experience and tenure as stated above, with number of countries lived in \( (r = .39) \), length of time abroad \( (r = .34) \), and with number of foreign languages spoken \( (r = .73) \). The number of languages spoken is positively correlated with the engineer/chemist role \( (r = .29) \).
Correlations among Personal Factors and Awareness of Paradox

The correlational analysis between the personal factors of cultural involvement and the 9 paradoxes and factors indicates several significant relationships. These findings are presented in Table 5.11.

**Paradox 1 (Powerful/powerless)** correlates significantly with number of children \( (r = .33) \) and length of time abroad \( (r = .34) \). Whether this is explained by the type of jobs the longer-term expatriates held or the humbling experience of parenthood cannot be determined. Positive relationships that approximated significance exist with previous overseas experience \( (r = .25) \), number of countries lived in \( (r = .27) \), and tenure before the overseas assignment \( (r = .26) \).

**Paradox 2 (Positive regard/caution)** is significantly correlated with language effort \( (r = .36) \) and approaches significance in a negative direction with previous overseas experience \( (r = -.22) \).

**Paradox 3 (HO/HC demands)** is positively correlated with previous overseas experience \( (r = .30) \) and number of countries lived in \( (r = .33) \). The relationship between Paradox 3 and length of time abroad approaches
significance \( (r = .24) \). Therefore, this is clearly a paradox that is experienced by long-term expatriates.

**Paradox 4 (Stereotype/individual difference)** is not significantly correlated with any of the personal factors but the relationships with age at posting \( (r = -.23) \) and the number of countries lived in \( (r = .22) \) are almost significant.

**Paradox 5 (Relinquish/strengthen values)** is strongly correlated in a negative direction with age at posting \( (r = -.40) \). This means that younger expatriates were more likely to report that they had experienced the relinquishing/strengthening values paradox. Perhaps this is related to more openness on the part of younger expatriates. A positive relationship exists with previous international travel \( (r = .37) \). Two negative relationships that fall short of significance are found with tenure and language effort \( (r = -.25 \) and \( r = -.26 \), respectively).

**Paradox 6 (At ease anywhere/belonging nowhere)** is not significantly related to any personal factors. **Paradox 7 (Macro/micro perspective)** has a strong negative correlation with age at posting \( (r = -.39) \) and an almost significant relationship with length of time spent abroad \( (r = .23) \).

**Paradox 8 (Ideal/real values)** is positively correlated with both previous overseas experience and number of
countries lived in ($r=.34$ and $r=.37$, respectively). It is negatively correlated with age at posting ($r=-.32$).

**Paradox 9** *(Free/not free of norms)* is correlated with only one variable - language fluency ($r=.39$). Two negative relationships are almost significant with this paradox: age at posting ($r=-.26$) and desire to go abroad ($r=-.25$).

The **total number of paradoxes** is negatively correlated with age at posting ($r=-.35$). Positive relationships which approach significance are length of time abroad ($r=.22$) and language fluency ($r=.24$). The number of negative correlations between age at posting and the paradoxes may indicate that older people are less open to perceiving the dualities of the experience, unless they have already spent considerable time abroad.

The correlations with the paradox factors appear in Table 5.12 and the significant relationships are identified in the following paragraphs. The **Freedom/Constraint** factor is significantly and positively correlated with the number of countries lived in ($r=.28$) and negatively correlated with age at posting ($r=-.29$). The positive correlations with language fluency and previous overseas experience were almost significant ($r=.24$ and $r=.23$, respectively). A negative relationship with the occupation of accountant approached significance ($r=-.27$).
### TABLE 5.12  CORRELATION AMONG CULTURAL AND PERSONAL FACTORS OF CULTURAL INVOLVEMENT AND AWARENESS OF PARADOX

<table>
<thead>
<tr>
<th>Cultural Factors</th>
<th>Freedom/Constraint</th>
<th>Value Dimension</th>
<th>Trust/ Mistrust</th>
<th>Social Acuity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural Similarity</td>
<td>-.02</td>
<td>-.2</td>
<td>.04</td>
<td>-.07</td>
</tr>
<tr>
<td>Cultural Mentor</td>
<td>-.21</td>
<td>-.47**</td>
<td>.00</td>
<td>-.19</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personal Factors</th>
<th>Freedom/Constraint</th>
<th>Value Dimension</th>
<th>Trust/ Mistrust</th>
<th>Social Acuity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age at posting</td>
<td>-.29*</td>
<td>-.49**</td>
<td>-.06</td>
<td>-.02</td>
</tr>
<tr>
<td>No. of children</td>
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<td>.07</td>
<td>.04</td>
<td>.13</td>
</tr>
<tr>
<td>Previous overseas experience</td>
<td>.23+</td>
<td>-.08</td>
<td>-.2</td>
<td>.31*</td>
</tr>
<tr>
<td>No. of countries lived in</td>
<td>.28*</td>
<td>-.04</td>
<td>-.14</td>
<td>.34*</td>
</tr>
<tr>
<td>Tenure</td>
<td>-.1</td>
<td>-.24+</td>
<td>.13</td>
<td>.16</td>
</tr>
<tr>
<td>Previous int'l travel</td>
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<td>.25+</td>
<td>-.09</td>
<td>-.11</td>
</tr>
<tr>
<td>Desire to go abroad</td>
<td>-.08</td>
<td>-.12</td>
<td>-.09</td>
<td>.12</td>
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<tr>
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</tr>
<tr>
<td>No. of foreign languages spoken</td>
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<td>.00</td>
<td>.00</td>
<td>.07</td>
</tr>
<tr>
<td>Language effort</td>
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<td>-.28+</td>
<td>.12</td>
<td>.02</td>
</tr>
<tr>
<td>Language fluency</td>
<td>.24+</td>
<td>.07</td>
<td>.14</td>
<td>-.07</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Freedom/Constraint</th>
<th>Value Dimension</th>
<th>Trust/ Mistrust</th>
<th>Social Acuity</th>
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<td>.11</td>
<td>-.16</td>
<td>.00</td>
<td>.28+</td>
</tr>
<tr>
<td>Engineer/Chemist</td>
<td>-.11</td>
<td>.21</td>
<td>.00</td>
<td>-.24+</td>
</tr>
<tr>
<td>Auditor</td>
<td>.04</td>
<td>-.04</td>
<td>.00</td>
<td>.09</td>
</tr>
<tr>
<td>Banker</td>
<td>.02</td>
<td>.30*</td>
<td>.28*</td>
<td>.02</td>
</tr>
<tr>
<td>Lawyer</td>
<td>.17</td>
<td>-.03</td>
<td>.00</td>
<td>.26+</td>
</tr>
<tr>
<td>Accountant</td>
<td>-.27+</td>
<td>-.29*</td>
<td>-.32*</td>
<td>-.53**</td>
</tr>
</tbody>
</table>

**Note:**

- **N = 35**
- .10 = +
- .05 = *
- .01 = **
The Value Dimension factor correlated significantly in a positive direction with the occupation of banker ($r = .30$). It correlated negatively with the occupation of accountant to a moderate degree and to a strong degree with age at posting ($r = -.29$ and $r = -.48$, respectively). The negative correlation with tenure ($r = -.24$) that approaches significance is perhaps another measure of the age at posting. The effort made to learn the language, for which a higher score indicates that no effort was made, correlates negatively with this factor and approaches the level of statistical significance ($r = -.28$). Degree of previous international travel correlates positively with the value dimension and is almost significant ($r = .25$).

The Trust/Mistrust factor correlates negatively to a significant degree with the occupation of accountant ($r = -.32$) and positively with the occupation of banker ($r = .28$).

The Social Acuity factor correlates positively to a significant degree with previous experience abroad ($r = .31$), the number of countries lived in ($r = .34$), and length of time abroad ($r = .33$). There is a strong negative correlation between social acuity and the occupation of accountant ($r = -.53$). Correlations which approached significance for this factor exist with three occupations: general manager ($r = .28$), lawyers ($r = .26$), and engineers/chemists ($r = -.24$).
These findings indicate that the different occupations are differentially aware of these paradoxes. However, it is important to bear in mind that the accountant category consistently failed to perceive the paradox factors consists of only three subjects. Perception of the social acuity paradoxes seems to be correlated with the longer term expatriates. There also appears to be a clear relationship between language ability and effort and the experience of paradoxes.

In response to the question, "Do factors that promote cultural involvement affect the awareness of paradox?", the answer is affirmative. However, not all the cultural involvement factors related to all the paradoxes or to the total number of paradoxes. The factors that relate to the total number of paradoxes that were experienced are the presence of a cultural mentor, a younger age at the time of the assignment, and the lack of available local technical expertise as a reason for the assignment.

Each of the individual paradoxes correlates with at least one of the cultural involvement factors. Furthermore, all of the cultural involvement factors correlate with at least one individual paradox, with the exception of the desire to go abroad and the number of foreign languages spoken. Paradox 1 (powerless-powerful) correlates with the highest number of cultural involvement
factors. Initiation activity and lack of available local technical expertise are the cultural involvement factors that correlate with the highest number of individual paradoxes. Furthermore, the direction of the correlations supports the assumption behind these variables - that greater involvement should lead to the experience or paradox.

In summary, factors that predispose expatriates to greater degrees of cultural involvement are related to their experience of paradox. While all but a few of the cultural involvement variables used in this study do relate to the awareness of paradox, some are more significant than others because they relate to more than one paradox. The small sample prevents firm conclusions about these variables but age at the time of posting, language fluency, job type, occupation, customer contact, reasons for the assignment, and all the variables associated with long term expatriates (length of time abroad, number of countries lived in, and previous overseas experience) definitely warrant further research in relation to expatriate paradoxes.

III. H2: Competencies

The next step of the analysis dealt with the second hypothesis - is there a positive relationship between the
awareness of paradox and the three competencies identified by the researcher? The three competencies are ego development, self monitoring, and incongruity adaptation. The means for these variables appear in Table 5.13.

**Ego Development.** The mean for ego development is 3.62 (SD=1.03), between Loevinger's 3/4 and 4 category where most adults are when they graduate from college (Loevinger, 1976). The modal level for adults in American society is the I-3/4 level. Therefore, this sample is slightly higher than the mode. Table 5.14 shows the number of subjects at each stage of ego development. This sample differs perhaps from a normal adult sample because two subjects were coded at the Delta/3 level which is characterized by self-protection and manipulation. This is an exceptionally low stage of ego development for adults; juvenile delinquents are more commonly found at this stage. Neither of these subjects had a successful experience in both social and work spheres, compared to the other expatriates in the study. One succeeded at work but had no social life. The other came the closest to "going native", had marked difficulties at work, and asked to return early.
Table 5.13

Means Table: Competencies, Acculturation, and Effectiveness

<table>
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<tr>
<th></th>
<th>M</th>
<th>SD</th>
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<tr>
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<tr>
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<tr>
<td>Self-Monitoring</td>
<td>9.78</td>
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<td>35</td>
</tr>
<tr>
<td>Stage Presence</td>
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</tr>
<tr>
<td>Other Directed</td>
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<td>Effectiveness</td>
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<td>Stages</td>
<td>No. of Subjects</td>
<td>%</td>
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<td>Impulsive (Delta)</td>
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<td>Self-Protective (Delta/3)</td>
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<td>5.7</td>
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<tr>
<td>Conformist (3)</td>
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<td>5.7</td>
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<tr>
<td>Self-Aware (3/4)</td>
<td>8</td>
<td>22.8</td>
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<tr>
<td>Conscientious (4)</td>
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<td>54.3</td>
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</tr>
<tr>
<td>Individualistic (4/5)</td>
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<td>8.6</td>
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<tr>
<td>Autonomous (5)</td>
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<td>2.9</td>
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<tr>
<td>Integrated (6)</td>
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</table>
According to Loevinger, people do not have the cognitive complexity to get beyond stereotypes until the 3/4 level. Therefore, I was interested in the experiences of the two subjects at the third level, Conformity. Although neither of these subjects had anything positive to say about the culture in which they lived, they were not ineffective in their work. One of the subjects buried himself in his work and had no social life. The other person at the conformist stage had an unusually high GIAL score and spent all his free time traveling. Since his job abroad was exactly the same as his job in the States, he experienced little role ambiguity. He fell in with an international crowd and conformed to their views.

**GIAL.** The GIAL scores for this group of subjects are below the national mean which is 49.5 (SD=6.5). As indicated in Table 5.13, the mean for this sample is 45.98 (SD=6.9).

**Self-Monitoring.** The self-monitoring scores for this group are also slightly below the norm which is 11 (Snyder, 1987). The mean for this sample is 9.78 (SD=3.7). The cut-off point for high and low self-monitoring for this sample is 10. Incidentally, the two Delta/3 subjects are extremely high self-monitors which fits with the manipulative aspect of that stage of ego development.
The self-monitoring variable consists of three subscales: self-control, stage presence, and other directed. Self control relates to the ability to actively control expressive behavior (e.g., "I would probably make a good actor" or "I can look anyone in the eye and tell a lie with a straight face (if for a right end)"). Stage presence concerns the propensity to perform in social situations and attract social attention to oneself (e.g., "At a party I let others keep the jokes and stories going" (keyed false), or "In a group of people I am rarely the center of attention" (false)). The other directed cluster concerns displaying what others expect one to display in social situations (e.g., "I may deceive people by being friendly when I really dislike them" (true) or "I guess I put on a show to impress or entertain people" (true)).

As is seen in Table 5.15, self-control is positively correlated with total self-monitoring ($r=.71$). It is also positively correlated with stage presence ($r=.55$) and other directed ($r=.37$). Stage presence is strongly correlated with total self-monitoring ($r=.75$) and other directed ($r=.52$). The other directed variable correlates very strongly with total self-monitoring ($r=.86$).
Table 5.15

Intercorrelations Among Competencies, Acculturation and Effectiveness

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<td>4. Self-Control</td>
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<td>.71**</td>
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</tr>
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<td>5. Stage Presence</td>
<td>—.21</td>
<td>.43**</td>
<td>.75**</td>
<td>.55**</td>
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<td>6. Other Directed</td>
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<td>.06</td>
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<td>.08</td>
<td>.10</td>
<td>—.24+</td>
<td>.32*</td>
<td>.60**</td>
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</tbody>
</table>

N = 35
.10 = +
.05 = *
.01 = **
Intercorrelations among the Competencies

Correlations among the three competencies appear in Table 5.15 and reveal strong positive relationships between GIAL and self-monitoring. GIAL correlates with total self-monitoring ($r=.42$) and two of the sub-scales, self control ($r=.46$) and stage presence ($r=.43$). There is no correlation with the other directed sub-scale.

Neither GIAL nor self-monitoring correlate with ego development. In fact, there is a negative relationship with self-monitoring, although it is not significant ($r=-.21$). However, a regression analysis indicates that ego development does moderate the relationship between self-monitoring and awareness of several of the paradoxes. With such a small sample, this finding could be attributable to the two subjects who have very low ego development scores and very high self-monitoring scores.

Correlations among the Competencies and Awareness of Paradox.

Contrary to the research hypothesis, there are a limited number of significant relationships among the individual paradoxes and the three competencies. These results appear in Table 5.16. Paradox 1 (powerful/powerless) is moderately correlated with ego development ($r=.30$). Paradox 2 (Positive regard/caution) is
almost significantly correlated in a negative direction with GIAL \( r = -0.22 \). \textbf{Paradox 3 (HQ/HC demands)} does not correlate significantly with any of the competencies.

\textbf{Paradox 4 (Stereotypes/individual differences)} is significantly correlated in a positive direction with two of the self-monitoring sub-scales, stage presence \( r = 0.28 \) and other directed \( r = 0.31 \). The correlation with the total self-monitoring score approaches significance \( r = 0.28 \).

\textbf{Paradox 5 (Relinquish/strengthen values)} is strongly correlated in a positive direction with the other directed sub-scale of self-monitoring. The correlation with the total self-monitoring score approaches significance \( r = 0.25 \).

\textbf{Paradox 6 (At ease anywhere/belonging nowhere)} is positively correlated to a significant degree with ego development \( r = 0.28 \). It is almost significantly correlated with the other directed sub-scale of self-monitoring \( r = 0.26 \).

\textbf{Paradox 7 (Macro/micro perspective)} is negatively correlated to a significant degree with the self control sub-scale of self-monitoring \( r = -0.31 \). \textbf{Paradox 8 (Ideal/real values)} and \textbf{Paradox 9 (Free/not free of norms)} do not correlate significantly with any of the competencies.
Table 5.16

Correlation Matrix of Paradox Awareness, Competencies, Acculturation and Effectiveness

<table>
<thead>
<tr>
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<td>.10</td>
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<td>-.02</td>
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<td>-.17</td>
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<td>-.08</td>
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<td>.07</td>
<td>.19</td>
<td>-.06</td>
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<td>.17</td>
<td>-.11</td>
<td>.15</td>
<td>-.07</td>
<td>-.12</td>
<td>.16</td>
</tr>
</tbody>
</table>

N = 35
10 = +
.05 = *
.01 = **
The total number of paradoxes correlates positively to a significant and moderate degree with both ego development \( (r = 0.34) \) and the other directed sub-scale of self-monitoring \( (r = 0.29) \). Correlations with both stage presence and the total self-monitoring scale approach significance in the positive direction \( (r = 0.23, \text{ and } r = 0.25, \text{ respectively}) \).

With the exception of the negative correlation between self control and Paradox 7, the correlations are in the predicted positive direction. Ego development and the other directed sub-scale are the most correlated competencies. The self-monitoring scale shows a sufficient relationship with the paradoxes to warrant its inclusion in future research. Even though GIAL and self-monitoring are strongly correlated \( (r = 0.42) \), GIAL does not correlate significantly with any of the individual paradoxes. It is interesting that the only self-monitoring sub-scale with which GIAL does not correlate is the other directed one that appears to be highly related to the awareness of paradox.

When we examine the relationships between the competencies and the paradox factors, which appear in Figure 5.17, we find no significant correlations with either the Freedom/Constraint factor or the Valuc Dimension. The Trust/Mistrust (Paradoxes 2 and 6) factor is significantly correlated in a positive direction with
ego development ($r = .35$) and is almost significant in a negative direction with GIAL ($r = -.26$). Social acuity (Paradoxes 1 and 4) is positively correlated to a significant degree with ego development ($r = .30$) and stage presence ($r = .33$).
Table 5.17

Correlation Matrix of Paradox Factors:
Competencies, Acculturation, and Effectiveness

<table>
<thead>
<tr>
<th></th>
<th>Freedom/Constraint</th>
<th>Value Dimension</th>
<th>Trust/ Mistrust</th>
<th>Social Acuity</th>
</tr>
</thead>
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<tr>
<td>Competencies</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ego Development</td>
<td>.02</td>
<td>.07</td>
<td>.36*</td>
<td>.30*</td>
</tr>
<tr>
<td>GIAL</td>
<td>.18</td>
<td>.03</td>
<td>-.26*</td>
<td>.16</td>
</tr>
<tr>
<td>Self-Monitoring</td>
<td>.14</td>
<td>.07</td>
<td>.05</td>
<td>.20</td>
</tr>
<tr>
<td>Self-Control</td>
<td>.02</td>
<td>-.19</td>
<td>.03</td>
<td>.21</td>
</tr>
<tr>
<td>Stage Presence</td>
<td>.15</td>
<td>-.02</td>
<td>.00</td>
<td>.33*</td>
</tr>
<tr>
<td>Other Directed</td>
<td>.12</td>
<td>.22</td>
<td>.13</td>
<td>.15</td>
</tr>
<tr>
<td>Acculturation</td>
<td>-.06</td>
<td>-.02</td>
<td>-.40**</td>
<td>-.12</td>
</tr>
<tr>
<td>General</td>
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<td>-.50**</td>
<td>-.29*</td>
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<tr>
<td>Interpersonal</td>
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<td>-.12</td>
<td>-.25*</td>
</tr>
<tr>
<td>Work</td>
<td>-.16</td>
<td>.02</td>
<td>-.34*</td>
<td>.21</td>
</tr>
<tr>
<td>Effectiveness</td>
<td>-.25+</td>
<td>.12</td>
<td>.06</td>
<td>.34*</td>
</tr>
<tr>
<td>Performance Appraisal</td>
<td>-.14</td>
<td>.19</td>
<td>.00</td>
<td>.37*</td>
</tr>
</tbody>
</table>
These findings led the researcher to take three further steps. First, the subjects with extremely low ego development scores were eliminated from the sample before rerunning the correlations. The major result was that ego development then correlated significantly with Paradox 4 and all the correlations increased and many achieved a higher degree of probability. The second step included regression analyses using ego development as a moderating variable in the relationship between both GIAL and self-monitoring and the awareness of paradox. There was a strong interaction effect between ego and self-monitoring when the dependent variables were the following paradoxes - Paradox 1, 3, 4, 5, 6, and 8. When the same analysis was done with GIAL, ego development had a strong effect on the relationship between GIAL and Paradoxes 1, 2, 3, 4, 5, 6, 7, and 9. The third step was to divide the sample into low and high groups according to their competency scores to see if the two groups were significantly different. However, these divisions did not satisfactorily distinguish groups of expatriates because their patterns of competencies were so varied and were not supported by the qualitative data.

In summary, the answer to the question regarding the positive relationship between the competencies and the awareness of paradox is complex. Ego development is clearly related to the awareness of paradox, as is self-
monitoring, its other directed sub-scale in particular. GIAL correlates negatively with only one of the paradoxes, although it correlates strongly with total self-monitoring and two of its sub-scales. Ego development is a moderating variable between both GIAL and self-monitoring and the awareness of paradox. Subjects at all levels of ego development perceived at least some paradoxes, contrary to Loevinger's statement that the awareness of paradox does not occur until very high levels of ego development. One explanation is that not all subjects framed these issues as paradoxes; in their eyes, they were perhaps merely problems or obstacles. That may also explain why there is no relationship between GIAL and the awareness of paradox, although I wonder whether the below average mean for this group affects these findings.

IV. **H3 and H4: Acculturation and Effectiveness**

The objective of this portion of the analysis was to test the third and fourth hypothesis, that there is a positive relationship between the awareness of paradox and acculturation and effectiveness.

**Acculturation.** The means for the acculturation variable are presented in Table 5.14. The weighted mean for this sample is 5.56 (SD=74). There are no norms for this instrument since it is recently constructed. However, the
mean for a sample in a recent study (Black, 1988) utilizing a slightly different version of this instrument was 6.02 for the work adjustment factor and 5.77 for the general adjustment factor. The acculturation instrument has a total score, total adjustment, and three sub-scales: general adjustment, interpersonal and work related. The reliability analysis on these sub-scales yielded the following alpha scores: general adjustment (.73), interpersonal adjustment (.85), and work adjustment (.82).

**Effectiveness.** The effectiveness measure consists of both self-reported effectiveness and the subjects' recollection of their performance appraisal ratings. The weighted mean for the self-reported effectiveness measure is 3.90 (SD=.63) on a 5 point scale. The weighted average on the performance measure, derived from performance appraisal evaluations is 81.8 (SD=9.28) on a scale from 0 to 100. Both means appear in Table 5.13.

**Intercorrelations among Acculturation and Effectiveness**

The intercorrelations for the acculturation measure, found in Table 5.15, show strong relationships between the total adjustment and the three subscales (r=.70 to .85). The general adjustment sub-scale is highly correlated with both interpersonal and work adjustment (r=.53 and r=.56, respectively). However, the relationship between work and
interpersonal adjustment is lower but still significant \((r=.28)\).

As can be seen in Table 5.15, the two effectiveness measures are strongly correlated in the positive direction \((r=.60)\). Nevertheless, we find different patterns in their correlations with the competency measures and acculturation.

Self-reported effectiveness is strongly correlated in a positive direction with total adjustment \((r=.41)\). It correlates to a lesser, but still significant degree, with general adjustment \((r=.28)\). Not surprisingly, effectiveness is very strongly correlated with work adjustment \((r=.61)\). It does not correlate significantly with interpersonal adjustment.

There is no significant relationship between the performance appraisal measure and either total adjustment or general adjustment. However, there is a moderate positive relationship that achieves significance with work adjustment \((r=.32)\) and a negative correlation that is almost significant with interpersonal adjustment \((r=-.24)\). It is interesting that interpersonal adjustment has no significant relationship to effectiveness and a negative relationship with performance appraisal. The factors that comprise the interpersonal adjustment scale pertain to
socializing, interacting, and speaking with host country nationals.

**Correlations among Acculturation and Effectiveness and the Competencies**

As seen in Table 5.15, there are no significant relationships between either ego development or self-monitoring and the acculturation measure. However, there are positive relationships that fall short of significance between GIAL and both total and general adjustment ($r=.25$, $p=.07$). The same is true of the relationship between GIAL and work adjustment ($r=.22$, $p=.10$).

Effectiveness is moderately correlated with ego development ($r=.31$) in a positive direction. The relationship between effectiveness and stage presence is almost significant ($r=.25$).

Performance appraisal does not correlate significantly with any of the competency measures.

In summary, the few significant relationships that exist between the competencies and acculturation and effectiveness are all in the positive direction. Although GIAL was not related to the awareness of paradox, this variable is almost significantly related to the acculturation measures. Effectiveness relates to ego
development, perhaps in part because those with high ego development may tend to rate themselves highly.

Correlations among Acculturation and Effectiveness and the Awareness of Paradox

The purpose of this analysis is to test the hypotheses that there is a positive relationship between the awareness of paradox and acculturation, and between the awareness of paradox and effectiveness. Table 5.16 presents the correlations between acculturation and effectiveness and the awareness of paradox. Paradox 1 (Powerful/powerless) is positively correlated with both effectiveness and performance appraisal to a significant degree (r=.33, and r=.32, respectively).

Paradox 2 (Positive regard/savvy) is not significantly related to any of the acculturation or effectiveness measures. Neither are Paradox 7 (Macro/micro perspective) or Paradox 8 (Ideal/real values).

Paradox 3 (HQ/HC demands) is negatively correlated to a significant degree with effectiveness (r=-.34). Presumably, feeling caught between conflicting demands makes people less likely to see themselves as effective.

Paradox 4 (Stereotypes/individual differences) is strongly negatively correlated to a significant degree with
general adjustment \((r=-.42)\). This may highlight the weakness in this adjustment measure since it may be measuring people's comfort with the other culture rather than their degree of acculturation, in the sense of a real assimilation of values.

Paradox 5 (Relinquish/strengthen values) is negatively correlated with interpersonal adjustment, although the relationship does not achieve significance \((r=-.22)\).

Paradox 6 (At ease anywhere/belonging nowhere) is negatively correlated to a significant degree with 3 of the 4 adjustment measures. These negative correlations exist with total adjustment \((r=-.48)\), general adjustment \((r=-.56)\), and work adjustment \((r=-.42)\). Apparently people who were highly adjusted abroad did not feel that they belonged nowhere. This paradox was controversial with some subjects and is discussed in greater detail in the qualitative chapter.

Paradox 9 (Free/not free of norms) is negatively correlated with work adjustment, but falls short of significance \((r=-.23)\).

The total number of paradoxes is significantly correlated with only one of these measures. There is a moderate negative relationship with general adjustment \((r=-.28)\), an artifact of the strong correlation between adjustment and Paradox 6.
The Freedom/Constraint factor is negatively correlated with effectiveness and is almost significant \((r=-.25)\). The Value Dimension is not significantly correlated with either acculturation or effectiveness.

The Trust/Mistrust (Paradox 2 and 6) factor is significantly correlated in a negative direction with total adjustment \((r=-.40)\), general adjustment \((r=-.50)\), and work adjustment \((r=-.34)\). These relationships can be traced back to the relationship between Paradox 6 and the adjustment measures.

Social Acuity (Paradox 1 and 4) is negatively correlated to a significant degree with general adjustment \((r=-.29)\). It is positively correlated to a strong degree with both effectiveness \((r=.34)\) and performance appraisal \((r=.37)\). A negative correlation which is almost significant exists between social acuity and interpersonal adjustment \((r=-.25)\).

The purpose of this analysis was to determine whether the awareness of paradox is related to acculturation and effectiveness. Hypothesis 4 predicted a positive relationship between the awareness of paradox and acculturation. The results disprove the hypothesis. The significant correlations that exist between these two categories of variables are negative. The adjustment measures correlate negatively with both Paradox 4
(stereotype/individual differences) and Paradox 6 (at ease anywhere/belonging nowhere).

Hypothesis 4 posited a positive relationship between the awareness of paradox and effectiveness. Once again, we find a mixed answer in the results. There are only two positive, significant, relationships. Both effectiveness and performance appraisal correlate with Paradox 1 (powerful/powerless). However, the only other significant relationship is a negative one, that between Paradox 3 (HQ/HC demands) and effectiveness. Therefore, a positive relationship is found to exist between effectiveness and only one paradox.

Multiple regression analysis was performed, utilizing the competencies as moderating variables in the paradox-acculturation/effectiveness relationships. The results were not significant.

What explains the lack of relationship between awareness of paradox and acculturation and effectiveness? Perhaps the assumption that greater awareness leads to greater effectiveness is false. The connection between attitudes and behavior is not always a linear one. On the other hand, perhaps awareness of paradox is only a small part of expatriate acculturation and effectiveness and not what people were thinking of when they filled out their self-report measures. The adjustment measure used in this
study may not measure the type of acculturation to which awareness of paradox is related. The greater cognitive complexity that is involved in perceiving paradox (Loevinger, 1976) may lead a person to see more shades of gray when it comes to evaluating their adjustment. They may also be more aware of what they don't know about the other culture than someone with a simplistic superficial knowledge. As a result, they may rate their adjustment less positively than others. One of the difficulties with a self-report measure like this is that the most acculturated people may be those who do not consider themselves well acculturated. Another explanation for the lack of a relationship between awareness of paradox and acculturation and effectiveness is that none exists.

Perhaps the most interesting learning about the competencies, which comes from both the quantitative data and the qualitative data from the interviews, is that one competency alone could not be used to predict expatriate success at acculturation or effectiveness. It is the interaction with the environment and other competencies that produces unique but still viable experiences, i.e., the person with low ego development who had no social life but was successful at work or the conformists who fell in with a positive group of third country expatriates rather than one that held negative views toward host country
nationals. Some of the people with very low GIAL scores still traveled and sought out a degree of novelty, even if they tended to buffer themselves inside their families or the American community. The correlational nature of this study is too simple to capture the complexity of the phenomenon, but it does indicate important relationships that are worth pursuing. Table 5.18 presents a summary of the significant correlations with the awareness of paradox.
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<td>Initiation activity</td>
</tr>
<tr>
<td>Size of facility (-)</td>
<td></td>
<td>Cultural similarity</td>
<td>Previous overseas experience</td>
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<tr>
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<td>Language effort</td>
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<td><strong>RELINQUISH/STRENGTHEN VALUES</strong></td>
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CHAPTER VI

DISCUSSION AND RECOMMENDATIONS

The final chapter contains an overview of this study and a review of the significant findings in relation to the research questions and hypotheses. It presents the limitations and weaknesses of the investigation and the theoretical implications of the data and suggestions for future research. The chapter concludes with the practical implications of the study.

Overview of the Study

The sojourn literature on expatriate business people has seldom focused upon the expatriates' subjective experience. Furthermore, the issue of expatriate paradoxes has not been well developed or researched empirically. Therefore, the current investigation analyzed the experiences of 35 returned expatriates, making use of the framework of the mythical hero's adventure (Campbell, 1968) and the metaphorical "road of trials" or paradoxes.
The qualitative aspect of the study focused upon thematic analysis of the phases of the hero's adventure that appeared in the expatriate interviews. The quantitative portion of the study examined the issue of paradox - the cultural involvement variables that affect it, the competencies required to deal with it, and its relation to both acculturation and effectiveness. Instruments were created to measure the paradoxes and the cultural involvement variables that were explicated from the researcher's experience overseas. The three competencies identified for handling paradoxes were identity integration, tolerance of incongruity, and social acuity. They were measured by the Sentence Completion Test of ego development, the General Incongruity Adaptation Level (GIAL) instrument, and the Self-monitoring Scale. Acculturation and effectiveness were measured by self-report scales; performance appraisal, the second aspect of the effectiveness measure, was measured by self-reports of the performance appraisal evaluations received abroad.

The investigation examined the relation between the awareness of paradox and the other subsets of variables. Factor analysis, Pearson product moment correlations, were used to analyze the data.
Findings in Relations to the Research Questions

The study investigated the two research questions, (1) Do expatriate stories reflect the transformational nature of the hero's adventure metaphor? and (2) Do expatriates experience paradoxes and, if so, what are they? The study investigated the following hypotheses:

1. There will be a positive relationship between awareness of paradox and the degree of cultural involvement.
2. There will be a positive relationship between awareness of paradox and the three competencies (identity integration, incongruity tolerance, and social acuity).
3. There will be a positive relationship between awareness of paradox and acculturation.
4. There will be a positive relationship between awareness of paradox and effectiveness.

The Qualitative Findings

The metaphor of the hero's adventure did in fact serve as a useful framework for understanding the expatriate experience. The presence of "hero talk" in the interviews supports the contention that expatriates often "enact heroism" (Becker, 1973). Several categories of "hero talk" were identified: difficult work assignments, the accomplishment of work goals under less than favorably conditions, "going it alone", feeling "special", pride in
their ability to acculturate and adapt to changes, succeeding where other Americans failed, achieving a sense of mastery and self-confidence, and personal transformation.

The hero's adventure myths from all over the world share the same basic plot. The hero is separated from his or her country and enters unknown territory, overcomes trials and tribulations with the help of a magical friend, becomes transformed in the process and returns with a boon. The hero may or may not be treated like a hero when he or she returns home. The stages in the myth, adapted slightly to better reflect the expatriate experience, and their contribution to our understanding of expatriates are briefly summarized in the following paragraphs.

The metaphor helps us to comprehend the significance of the first stage in the myth, the "call", the offer of an overseas assignment, as a call to adventure. It highlights the importance of paying attention to one's visceral response to the offer and to the degree of commitment, of the entire family when families are involved, to the experience.

The second stage, "Crossing the threshold and the belly of the whale" help us to understand the intensity of the uncertainty and difficulty in the beginning months as the expatriates cross both physical and cultural
boundaries. The degree of change that confronts expatriates is hard to match in a domestic setting. Campbell's concept of the threshold guardians who guard the entrance into the unknown reflect the factors that may prevent the expatriate from entering the other culture. These are lack of language ability, the impermeability of the other culture, the tight leash of the parent company, and the restrictive nature of the overseas American community. The "belly of the whale" reflects the expatriates' immersion in the other culture - the psychological leave-taking of their own culture. As a result of exposing themselves to the other culture, they are forced to acknowledge that their own system of rationality and cultural patterns are not universally appropriate. This prompts great anxiety as expatriates relinquish Socrate's 'unexamined life' and learn about both themselves and their culture in the process of their questioning. This is a period of novelty and accelerated learning for expatriates as they struggle to make sense of the new culture and their job.

The third stage is the presence of supernatural aid - the magical friend who in the myths provides the hero with either a magical weapon or the assurance that they will succeed. For the expatriates, the extreme novelty and stress of the beginning months abroad, coupled with their
lack of knowledge about how to obtain social reinforcement in the new culture, signifies a forced return to childhood and dependency. This recreates the early family experience in which all adult helpers are perceived as gods (Rank, 1959). This helps us to understand the greater significance of magical friends to expatriates. The closest approximation is the cultural mentor, a member of the host country culture who translates and interprets the local culture and guides the expatriate successfully through its shoals. The expatriates in this study who had a cultural mentor were more aware of paradoxes, more fluent in the foreign language, better adapted to work and general living conditions abroad, and had higher ratings of both effectiveness and performance appraisal. The function of the magical friend is also performed by other Americans, experienced international residents of various nationalities, a career mentor back at headquarters, or by social or business networks, such as churches, international schools, and the Chamber of Commerce.

The next stage, "the road of trials" describes the obstacles and tests that face the hero. The sojourn literature includes ample descriptions of many such trials, but the paradoxes that expatriates must confront as they mediate between two cultures and two parts of the same organization has not been well developed. The expatriates
experienced an average of 5.43 of the 9 paradoxes. The percentages of the subjects who reported each paradox ranged from 46-77%. Therefore, the answer to the research question, "Do expatriates experience paradoxes and, if so, what are they?" is affirmative.

The following paradoxes were experienced, in varying degrees of both incidence and significance, by the subjects.

1. Powerful/powerless

2. Positive regard/caution about being taken advantage of by host country locals

3. Caught between Headquarters/Host country demands

4. Perceiving both cultural stereotypes/individual differences

5. Relinquishing/strengthening values

6. At ease anywhere/belonging nowhere

7. Macro/micro world view

8. Representing the ideal/reality of one's company

9. Free/not free of cultural norms

Most of these paradoxes had never been put into words by the expatriates, even though their reported incidence was high. Paradoxes represent complexity frozen in time and our inability to index priorities outside our own culture. These paradoxes are only figural until the expatriates learn to accept and resolve them by learning which truth to act upon in a given situation. For expatriates, paradox may
well be "the muddle" before new sets of contingencies are both accepted and clarified.

The next stage of the hero's adventure is the transformation, "the journey inward" as Campbell (1968) describes it. In myth, the consciousness is transformed by exposure to both trials or illuminating revelations; the hero penetrates to some source of power, a higher consciousness. The source of power for the expatriate is a bicultural perspective, increased self awareness, and the knowledge that he or she had the inner resources to master a difficult situation. Penetrating to that power, the crux of mythical transformation, involves a death and a rebirth. In the case of expatriates, death is symbolized by leaving behind both their dependency and a former way of thinking and perceiving. The interviews tell a story of both "letting go" and "taking on", the process whereby expatriates are transformed. The specific factors in this process appear in the accompanying list.

**Letting Go:**

1) cultural certainty
2) unquestioned acceptance of basic assumptions
3) the unexamined life
4) one's frame of reference
5) accustomed role and status
6) knowledge of social reinforcement
7) accustomed habits and activities

Taking On:
1) internalized perception and values of the other culture
2) the role assigned by the other culture
3) a broadened outlook
4) the acceptance of and ability to handle paradox
5) a different experience of oneself
6) a sense of mastery
7) an addition to novelty

All but one of the subjects reported that they had changed as a result of their experience abroad. The categories of specific changes were: (1) positive changes in self; (2) negative changes in self; (3) changed attitudes; (4) improved work skills; (5) increased knowledge; and (6) closer family relationships.

Using the hero's adventure to understand the expatriate experience forces our attention from mere adjustment to transformation. The expatriates in this sample were similar to each other in terms of the basic transformational themes that emerged from the interviews. But they were dissimilar because the specific details of their transformation were unique. As Campbell said, the hero gets the particular adventure for which he or she is
ready; and the journey inward that characterizes the hero's adventure produces unique learnings.

The importance of the transformation theme has strong implications for the final stage of the hero's adventure, "the return". This can be the most difficult stage of all for both heroes and expatriates if they no longer fit snugly back into their native culture or company, or if the boons they bring home are not appreciated. Expatriates, like mythical heroes, may or may not be treated like heroes upon their return. The majority of the subjects reported that repatriation was difficult, even though most of them were ready to come home. Several reasons for the difficulty emerged from the interviews: (1) the 'You can't go home again' syndrome; (2) the 'Little fish in a big pond' syndrome; (3) a high degree of uncertainty about their job upon return and the logistics of the move; (4) lack of interest in their experiences by people at home; (5) the idealization of home that occurred abroad and false expectations; (6) readjusting to decreased autonomy; and (7) the testing period at work where they have to prove themselves once again and assure the company that they had not changed too much overseas; and (8) missing life abroad.

Repatriation was not difficult for all the subjects; those who had lived in several cultures and had returned once before had clearer expectations about what to expect.
Those who were promoted upon their return were more positive than those who were demoted or placed in a lateral position with little evidence of career planning. The subjects who consistently reported the most difficulty were those who were forced to return before their tour of duty was completed. They talked about their early return in terms of grieving. Expatriate expectations about the nature of the overseas assignment, its length, and repatriation appear to play a crucial role in their adjustment and satisfaction levels.

A majority of the subjects get to use the skills they developed abroad in their domestic jobs; those who do not describe that as a source of dissatisfaction. The types of boons that expatriates bring back with them are biculturalism (the internalized perceptions and values of two cultures), increased interpersonal skills, and listening skills in particular, ability to adapt to changes and perceive paradoxes, and a broader perspective of both business and the world.

The overseas experience was an extremely significant experience for the expatriates. Sixty percent of them would return abroad again with no hesitation. Repatriation and the inevitable comparisons with their overseas life reveal the essence of that experience - constant learning,
feeling "special", more alive, more challenged, and more heroic.

Using the hero's adventure enables us to better appreciate the subjective and symbolic nature of the expatriate experience.

**Hypothesis One.** Hypothesis One was also supported by the data. All but 3 of the 43 cultural involvement variables were significantly related to at least one of the paradoxes. Some are more significant than others because they relate to more than one paradox and in stronger degrees of correlation. The direction of the correlations supports the assumption that guided the development of these variables - that greater cultural involvement should lead to greater experience of paradox.

Factors that are negatively related to the awareness of paradox are older age at the time of posting, research jobs, and the occupation of accountant. By contrast, the more customer contact, number of third country co-workers, language fluency, length of time abroad, number of countries lived in, and previous overseas experience, the greater the awareness of paradoxes. Awareness of paradox was also related to the lack of local technical expertise as a reason for the assignment.
Hypothesis Two. This hypothesis is supported for two of the three competencies. Both ego development and self-monitoring, particularly the other directed sub-scale, relate positively to the awareness of paradox. Ego development relates to both the powerful/powerless paradox and the at ease anywhere/belonging nowhere paradox. The other directed subscale of self-monitoring correlates positively with both the stereotype/individual differences paradox and the relinquish/strengthen values paradox. The stage presence subscale is positively related to the stereotype/individual differences paradox. Overall, the three competencies do not relate equally or significantly to all the paradoxes.

Hypothesis Three. This hypothesis was not supported since the only significant relationships between the paradoxes and the acculturation variables are negative ones. General adjustment was negatively correlated with the stereotype/individual differences paradox and the at ease anywhere/belonging nowhere paradox. The latter paradox was also negatively correlated with both the total adjustment scale and the work adjustment subscale. Thus, people who are not aware of the paradox report a higher degree of adjustment. The findings suggest that greater awareness of paradox, which implies increased cognitive
complexity, is related to less comfort with the other culture.

**Hypothesis Four.** Hypothesis Four is only partially supported by the data. A positive relationship exists between the two effectiveness measures (self-reported effectiveness and performance appraisal) and the powerful/powerless paradox. The other significant relationship is a negative one between effectiveness and feeling caught between headquarter/host country demands. This supports the idea that role conflict prevents individuals from feeling effective in their jobs.

**Limitations of the Study**

The general purpose of the study is descriptive rather than predictive. The generalizability of these results to other populations must therefore be considered with caution.

The selection of the subjects was limited by lack of travel funds to find subjects in other locations. Although the subjects work in a variety of organizations, there may be something unique about Cleveland returned expatriates that affects the results. Furthermore, the disparity in organizational background and the wide variety of expatriate experiences further limits the ability to
generalize from these results. It also reduces the number of subjects in different categories and eliminates certain statistical analyses.

It is noteworthy that this sample had few women or other minority members. Focusing upon these types of expatriates, who by definition are more marginal than white middle class males, may contribute a different perspective on the expatriate issue.

The sample size (n=35) was small for a quantitative study and fairly large for qualitative interviews. It is likely that more significant correlations would have been found with a larger sample size.

The acculturation and effectiveness measures present the usual difficulties with self-report measures. It is possible that people who are truly acculturated and perceive the paradoxes in the expatriate context will be aware that there is much more to learn about the other culture. In contrast, people who, in reality, are less acculturated, less sophisticated, and more sanguine may rate themselves as highly adjusted. Acculturation may be like education in that you "know enough to know you don't know anything."

The acculturation measure, while it is the only one available for expatriate business people, is not yet validated. It is possible that an acculturation instrument
that measures expatriate behavior would be preferable to
the one that was used.

The effectiveness measures obtained the subjects' self-reported effectiveness plus their memory of their performance evaluation while abroad. The disparity in performance appraisal systems makes comparative scores somewhat questionable, although the subjects had no trouble assigning themselves percentages. A more accurate measure would look at effectiveness from the perspective of the parent company, the host country subordinates and peers. There is reason to believe that different groups might have varying conceptions of effectiveness.

A longitudinal design would have provided greater opportunity to specify the relationships among the variables studied. Assessing the competencies before, during and after the sojourn would have contributed to an understanding of the directionality among the variables. Moreover, a longitudinal study would avoid the possibility of selective memory that exists with retrospective studies.

Suggestions for Continuing Research

The results of this investigation suggest new areas for future research. First, it would be interesting to include the other paradoxes identified by the subjects and see whether the same results would obtain with a larger
population. Secondly, is there any difference between expatriates who perceive paradoxes abroad and their subsequent managerial behavior back in the United States? The current work on paradox and dualisms (Evans, 1988; Quinn, 1988) equates the ability to perceive paradox with organizational effectiveness and survival. Is the overseas experience a good training ground for developing this ability?

Are there any notable differences between returned expatriates and parent company employees who did not have that experience? Are the returned expatriates more creative? Do they have appreciably different competencies?

There is some support for the idea that the expatriate experience is a crucible that evokes competencies from people who do not normally employ them in their own culture. For example, even a low self-monitor may act like a high self-monitor abroad because the situation demands it. A longitudinal study of the three competencies included in this investigation could determine whether they increase during the overseas period.

It would be interesting to see if the "most international" people Ratiu (1983) identified are high self-monitors.

There appears to be a need for an acculturation measure for expatriate business people that would measure
the degree of entry into the other culture, rather than the degree of comfort with various aspects of the other culture.

The role of expectations throughout the expatriation process appears to be crucial and deserves further research.

**Theoretical Implications**

The cultural involvement variables developed for this study do predict a certain degree of entry into another culture. A theory of cultural involvement for the business sojourner, adapted from acculturation theory, might yield a taxonomy of the different types of expatriate experiences.

The importance of a cultural mentor in this study indicates that this factor should not be excluded from acculturation theories. The presence of a cultural mentor may well prove to be a moderating or intervening variable in the acculturation process.

Cultural distance theory was supported by this research. However, the qualitative data suggest that Torbiorn's (1982) methodology for defining cultural distance (a combination of language, religion, and development) should also include the host culture's attitude to the expatriate's home culture. Americans would be treated differently than Swedes in many countries around
the world, because of historical factors, foreign policy and economic issues. In this study, the expatriates in Europe reportedly came under greater pressure to defend their country than did expatriates in other continents, even though we share a common heritage.

Simple relationships between expatriate traits or competencies are not sufficient to explain effectiveness. The results of this study seem to indicate that the picture is too complex. There may well be a threshold level, a certain number of factors that must be present, to result in either acculturation or effectiveness. The specific combinations of factors may not be as important as the need to have a certain number of them. Multivariate studies that include both internal and external factors would further the research in this area.

One of the most important contributions of the study is the language of paradox for expatriates. Although few of the subjects had ever conceptualized these paradoxes abstractly, each paradox had meaning for almost half of the expatriates. This implies that the concept of expatriate paradoxes is a valid phenomenon that accurately describes part of the expatriate experience. The concept has both theoretical and practical utility because it can be used for training and to build bridges between expatriates abroad and between expatriates and their
colleagues in the States. While domestic co-workers may not be willing to listen to anecdotes and "war stories", they may find the language of expatriate paradoxes interesting because it could contain lessons for effectiveness abroad.

**Practical Implications**

The practical purpose of the study was to gain a better understanding of the expatriate experience in order to improve the way it is handled by both expatriates and companies. The findings have implications for each phase of the expatriate process. While it is a simple idea, perhaps the best way to handle repatriation is to treat the return home exactly like the move abroad. The same uncertainty and generated affect, testing, and the importance of expectations are operating at repatriation. Moreover, the contrast from feeling heroic to feeling just like everyone else or perhaps even ignored makes this transition even more difficult. Unless an organization is dedicated to making all its employees feel like heroes, an idea that certainly has merit, it may be impossible for the domestic experience to equal the overseas one. But, when the job is challenging and makes use of their overseas skills, repatriation should prove easier.
Hiring human resource personnel with expatriate experience could eliminate the common complaint that the HR person does not understand. There were many such complaints about personnel's stinginess and lack of understanding about the local situation, particularly in the beginning of the assignment when logistical problems in the host culture were exacerbated by rigid personnel policies.

**Selection Criteria:**

- Match candidates to the job
- Candidates should have a strong desire to go abroad
- Candidates should have a strong sense of identity
- Candidates should be people who enjoy challenge and adventure
- It should be possible to refuse an international assignment without damaging one's career
- Use former expatriates to help with selection

**Before the Assignment:**

- Provide realistic expectations about the experience
- Provide adequate language/orientation training for the entire family
- Train people to deal with the paradoxes
- Reduce the uncertainty of the situation as much as possible
- Assign or help the expatriate find a cultural mentor
- Put expatriate immediately into a worthwhile job
- Allow expatriate time to get the spouse and family settled

**During the Assignment:**

- Modify structural or procedural processes that place the expatriate in the middle of HQ/host country conflicts
- Be sensitive about placing expatriates in double binds
- Make clear what key criteria need to be met and which aspects of the expatriates' jobs can be treated with discretion
- Assign a mentor at headquarters to oversee the expatriate's career development and act as an advocate

**Before Repatriation:**

- If possible, allow people to remain for the entire assignment, unless they wish to return early
- Keep expatriates up to date on the changes occurring at headquarters
- Provide realistic expectations about their domestic assignment
- Reduce as much uncertainty as possible regarding their return
- Train other employees about how to welcome expatriates and integrate them back into the parent company

**Upon Repatriation:**

- Pay special attention to logistics
- Treat expatriates like heroes by using their expertise and treat them with respect
- Expect that the expatriates will have changed and make allowances for those changes

- Provide them with opportunity to relate their experiences to other people, i.e., debriefing groups of returned expatriates or talks to other employees or community groups

- Assign jobs that attempt to match their overseas experience in terms of challenge, novelty, autonomy

- Assign cultural mentors who explain new developments, people, and norms

- Warn expatriates about the possibility of a testing period

Perhaps the most important learning for companies is that the expatriate experience is often one of the most significant in their lives and involves a transformation. Pretending that expatriates did not change abroad or not allowing them to contribute the boons they bring back ignores a potentially valuable resource and a means of revitalizing the organization. The challenge for organizations is to provide expatriates with the opportunity to enact heroism in their domestic assignments when they return home. Cross-cultural research like this highlights the importance of enacting heroism but, if we try to apply this lesson to the domestic context, we might find that enacting heroism is a concept that is applicable to life in all organizations.
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Dear

Thank you so much for agreeing to participate in the research on expatriate business people. Our purpose in this research is to gain a better understanding of the experiences of expatriates in the hopes that it will have implications for both expatriates and the companies who handle them. We're very grateful that you are willing to contribute your time to this study.

Please rest assured that your responses to the enclosed instruments and your interview data will be held in strictest confidence. We will be happy to share with you a report and analysis of the composite data of all subjects when the research is completed. In this report, care will be taken so that neither individuals nor companies can be identified.

We hope that the instructions are clear for the enclosed questionnaires. If you have questions, don't hesitate to call Joyce for further clarification. All answers should be marked on the questionnaires themselves with one exception. For the Purdue-Rutgers Prior Experience Inventory, please mark your answers on the attached answer sheet because it is scored by computer. Please do not write on the booklet itself.

Most of the questions will be quite easy but some may not exactly capture your situation. Please go ahead and answer all the questions as best you can because it is important to have a response to each question. The rules of thumb for instruments like these are to put down the first answer that comes into your head and try to be as honest as you can.

Filling out all the questionnaires will take approximately one hour. Please fill out your questionnaires in the order in which they are numbered and complete them before your interview with Joyce.

Good luck and thanks again!
APPENDIX B
RETURNED EXPATRIATE QUESTIONNAIRE

DATE: ________________

1. NAME ____________________________________________
   (last) __________________________ (first)

2. AGE _____

3. GENDER (circle one) M  F

4. COMPANY __________________________________________

5. TITLE ____________________________________________

6. LENGTH OF TIME EMPLOYED BY THIS COMPANY
   _____ Years _____ Months

7. What is your educational background?

   SCHOOLING COMPLETED
   ___ High school
   ___ Some college
   ___ College: major ________________________
   ___ Graduate degree ________________________

8. Did you go abroad by yourself or with a family? (If you had more than one international assignment, answer this question for your last assignment.)

   MARITAL STATUS ABROAD  NO. OF CHILDREN ABROAD _____
   ___ Single (never married) Comments: ________________________
   ___ Married
   ___ Divorced
   ___ Separated
   ___ Widowed
   ___ Other

9. If married, what nationality is your spouse? ________________________

10. How many years have you worked abroad? _____
    lived abroad? _____

11. How many foreign languages do you speak?

   FOREIGN LANGUAGES SPOKEN  DEGREE OF FLUENCY
   __________________________  Low   Medium   High
   __________________________
   __________________________
   __________________________
18. What was the reason for your last international assignment?

   a. The foreign enterprise was just being established (start-up phase).

   b. The parent firm wished to develop an internationally oriented management for the headquarters (foreign assignment is seen essentially as management development).

   c. No adequate management was available in the host country.

   d. There was a compelling need to maintain a foreign image.

   e. Technical expertise was not available locally.

   f. Other (please specify)
12. Did you always learn the language spoken in the countries where you lived? Why?

13. INTERNATIONAL EXPERIENCE: Please start with your earliest experience abroad and end with the most recent. Do not include vacations but do include stints as Peace Corps volunteers, AFS students, etc.

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14. In your most recent international assignment, how many direct reports (people you supervised directly) did you have?

No.

___ Americans
___ Host country nationals
___ Third country expatriates (This term is used throughout the questionnaire to refer to expatriates who are neither American nor host country nationals, e.g., a German working in Belgium.)

15. What was the size/type of the facility?

16. What was the sales volume or production volume of the unit?

17. What was the profitability of the unit?
18. What was the reason for your last international assignment?

   a. The foreign enterprise was just being established (start-up phase).

   b. The parent firm wished to develop an internationally oriented management for the headquarters (foreign assignment is seen essentially as management development).

   c. No adequate management was available in the host country.

   d. There was a compelling need to maintain a foreign image.

   e. Technical expertise was not available locally.

   f. Other (please specify)
APPENDIX C
PLEASE NOTE:

Copyrighted materials in this document have not been filmed at the request of the author. They are available for consultation, however, in the author's university library.

These consist of pages:

396-398 Loevinger's Test of Ego Development.
400-401 Snyder's Self-Monitoring Scale.
403-417 Purdue Rutgers Prior Experience Inventory, III.
   GIAL-SD
APPENDIX D
INTERVIEW PROTOCOL

1. Do any of the role categories on this sheet accurately describe your last job overseas? (combinations or different category?) (Role categories sheet is attached at end of protocol)

2. Tell me about your (last) overseas assignment, from the time when you first learned about the possibility of going to ______. (Let them talk freely for about ten minutes and only use prompt questions below when they run dry.)

What did you think when you first heard you were going to _____?

What were the first few days like?

Were there things that surprised you about the way people thought or worked?

What was your first big "ah-ha" about the culture?

HOW WOULD YOU SUM UP YOUR FIRST SIX MONTHS?

Whom did you know at this point?

Did you have someone who could explain the local culture to you and that you could confide in?

How did people see you?

Can you describe your relationship with your co-workers?

What did you think about your job?

Can you describe your relationship with your home organization?

What was the most important thing you learned in those first six months?

What did your family/wife think about living in _____?
3. CAN YOU DIVIDE YOUR EXPERIENCE INTO A SET OF STAGES OR CHAPTERS? WHAT WOULD YOU CALL THEM? (I write names of stages on a sheet and show them to the interviewee for the next question). How long did each stage last?

I. Stage ____________
   a) What was the biggest challenge:

   b) How did you respond?

II. Stage ____________
   a)

   b)

III. Stage ____________
   a)

   b)

IV. Stage ____________
   a)

   b)

4. Can you think of any instances during this assignment when you had to deal with contradictions or paradoxes at work or in your social life? I'm defining a paradox in the following way: when a person holds or sees two contradictory points of view which are both true and he or she has to decide which point of view to act upon in a particular instance.

(Give subject paradox instrument to fill out)
5. Have you ever experienced the following? Please write YES or NO in the first blank. When that's completed, rank order the paradoxes/contradictions according to the significance or importance they held for you. Assign a "1" to the paradox which was the most significant.

YES/NO RANK

   1. Possessing a great deal of power as a result of your role but downplaying it in order to gain necessary input and cooperation.

   2. Generally thinking well of the host country nationals while at the same time being very savvy about being taken advantage of by them.

   3. Feeling caught between contradictory demands of the headquarters on the one hand and the demands of the host country nationals and the local situation on the other.

   4. Seeing as valid the general stereotype about the culture you lived in but also realizing that many host country nationals do not fit that stereotype.

   5. Giving up some of your American values in order to be accepted or successful in the other culture while at the same time finding some of your core American values becoming even stronger as a result of exposure to another culture.

   6. As a result of being abroad a long time, feeling at ease anywhere but belonging nowhere.

   7. Becoming more and more "world-minded" as a result of exposure to different values and conflicting loyalties, but becoming more idiosyncratic as to how you put together your own value system and view on life.

   8. Trying to represent your company as best as you can in order to succeed but also realizing that the "ideal" values you act out abroad may not exist back at Headquarters.

   9. Being freed from many of your own cultural rules and even from some of the host culture's norms but not being free at all from certain host country customs which you must observe in order to be effective.

   10. Others you identified:
6. a) Choose the paradox or contradiction which was most significant for you - the one that represented the biggest challenge or discomfort. Either tell me what came to mind when you filled out the questionnaire or tell me about the time you first became aware of it. Pretend you're writing a newspaper article on this incident and include all the "facts" so that I will be able to describe the incident in detail afterwards.

What led up to the situation?
Who was involved?
What were you thinking?
What were you feeling?
What did you actually say?
What did you actually do?
What was the outcome of the situation?

b) So then, in your own words, the paradox or contradiction you are describing here was what?

Did you learn to live with it? How?
7. Do you think other Americans you saw abroad encountered or experienced difficulties of living and working in another culture that were:
   ___ Very similar to yours
   ___ Similar
   ___ Not similar
   ___ Very different

8. If "not similar" or "very different", describe their experience.

9. Whom did you generally socialize with?
   ___ Americans
   ___ Host country nationals
   ___ Third country expatriates

   Why?

(If subject socialized with anyone other than host country nationals, ask them the following question)

10. What was the attitude of the Americans or Third country expatriates you socialized with towards the _____(locals)? What adjectives would they use to describe them?

11. Was it easy for Americans to be accepted by the _____?
   Why?

12. Do you correspond with anyone from (country)? Yes___ NO___
    If so, with whom?
    ___ American
    ___ Host country nationals
    ___ Third country expatriates

13. How would you describe your living situation?
    ___ lived in a compound of expatriates
    ___ lived in a neighborhood composed primarily of expatriates
    ___ Lived in a neighborhood composed primarily of host country nationals
14. What type of non-work activities did you participate in? (with what group?)
Activities:

- Americans
- Host country nationals
- Third country expatriates

15. How many co-workers (either above or below you in the hierarchy) did you have to deal with on an average day in order to accomplish your work objectives? And what nationality were they?

- NO.
- Americans
- Host country nationals
- Third country expatriates

(At this point give them the acculturation and effectiveness instrument and check to make sure you have everything you need for two qualitative passages.)

16. Did you feel you changed as a result of working abroad? If so, how?

17. What was it like to come home?

18. Do you feel you get to use the skills you acquired abroad in your current job?
19. Would you go abroad again? Why?

20. If you had to select people to work abroad, what characteristics would you look for?

21. What advice would you give to a friend who was on their way to a foreign assignment?

22. What advice would you give to a person ending a foreign assignment about returning to the States?

23. What advice would you have for HR departments about handling expatriates?
#1. ROLE CATEGORIES:

1 - MANAGING DIRECTOR: whose responsibility was to oversee and direct the entire foreign operation.

2 - HEADQUARTERS REPRESENTATIVE: whose job was to serve as a figurehead and focus more on external relations (attending functions, external meetings) than on direct managerial duties.

3 - FUNCTIONAL HEAD: whose job was to establish or run a functional department (of what type?) in a foreign subsidiary.

4 - TECHNICAL ADVISOR: whose staff-like job was to train or advise host country nationals.

5 - TROUBLE-SHOOTER: whose assignment was to analyze and solve specific operational problems.

6 - OPERATIVE: rank-and-file member.

7 - RESEARCHER

8 - VOLUNTEER

9 - STUDENT

10 - MISSIONARY

11 - OTHER?
APPENDIX G
This memo is to confirm our meeting with you on Thursday, January 7 in the Marketing Conference Room of the Marketing Building to discuss your international experiences. Thank you again for agreeing to share these experiences with us as part of our ongoing research on international managers.

Mark asked if I could give you some idea of the general format for our discussion. I have included a very brief outline of some of the topics and issues we would like to address. Primarily we are interested in subjective descriptions of your individual experiences. We will use some prompt questions and a few activities to elicit these descriptions.

Format

a. Gather some demographic data about where you have been and for how long

b. Identification of key elements and relationships that characterize each person's experience

c. Discussion of issues surrounding entry into another culture

d. Impact of the experience on the individual

e. Process of re-entry

f. Identification of a pivotal incident

We look forward to meeting with you.
5. Have you ever experienced the following? Please write YES or NO in the first blank. When that’s completed, rank order the paradoxes/contradictions according to the significance or importance they held for you. Assign a "1" to the paradox which was the most significant.

<table>
<thead>
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<th>YES/NO</th>
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<td>1</td>
<td>Possessing a great deal of power as a result of your role but downplaying it in order to gain necessary input and cooperation.</td>
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<td>Trying to represent your company as best as you can in order to succeed but also realizing that the “ideal” values you act out abroad may not exist back at Headquarters.</td>
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<td>9</td>
<td>Being freed from many of your own cultural rules and even from some of the host culture’s norms but not being free at all from certain host country customs which you must observe in order to be effective.</td>
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10. Others you identified:
APPENDIX I
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These consist of pages:

432 Black's Adjustment Scale
434 Porter and Lawler Scales
APPENDIX J