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A narrative analysis of the subjective experience of U.S. expatriate managers

Ambuske, Gail Cort, Ph.D.
Case Western Reserve University, 1990
A NARRATIVE ANALYSIS OF
THE SUBJECTIVE EXPERIENCE
OF U.S. EXPatriate MANAGERS

by
GAIL CORT AMBUSKE

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

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August 1990
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Date  July 16, 1990

*We also certify that written approval has been obtained for any proprietary material contained therein.
A NARRATIVE ANALYSIS OF
THE SUBJECTIVE EXPERIENCE
OF U.S. EXPATRIATE MANAGERS

Abstract

by

GAIL CORT AMBUSKE

The world economy is becoming increasingly
interdependent. Corporations in the United States have
become less competitive in this global marketplace as
reflected in a dramatic decline in percentage of market
share. Pivotal to our ability to collaborate and compete
in a world economy are our human resources deployed
abroad. This study focused on the expatriate manager.
Specifically, the narratives of fifteen returned
expatriate managers were content analyzed to develop an
understanding of the subjective experience of the
individual while abroad. The subjective experience of
the individual was defined as a complex of relationships,
causal linkages and personal values.

The following questions guided the inquiry:
What are the contextual components of the expatriate
experience as delineated and interpreted by
individuals having worked abroad as managers?
What are the recurring subjects or ideas within or
across stories and narratives that reflect
significance for the individual expatriate?
What is the relationship of these themes to organizational and individual objectives abroad?
What are the images and metaphors that function as personal frameworks of analysis for the manager abroad?
What are the implications of these images and metaphors for expatriate behavior and organizational outcomes abroad?

A research methodology was developed using the assumptions and methods of rhetorical criticism, literary criticism, and ethnography. Data analysis involved contextual analysis of the individual narratives, structural analysis of stories embedded within the narratives, and thematic analysis of narrative content.

Themes and overarching metaphors were developed and used to explore the implications of specific subjective meanings for the individual and the organization(s) to which the expatriate manager belongs.

Major findings included the following:

1. Individual narratives contained rich data for our understanding of the subjective experience of the individual abroad.

2. A methodology that combines the approaches of rhetorical criticism, literary criticism, and
ethnography can develop enlarged understandings of the human experience using the natural artifacts of that experience.

3. The expatriate subjective experience abroad exists in a complex, reciprocal relationship with the objective characteristics of the assignment abroad.

4. The themes of failed dependence, escape from complexity, gamboling, nascence, institutionalized marginality, illusion, and heightened visibility of self reflected the subjective reality of the experience for the individual expatriate.

5. The metaphors of the game, the romantic journey, the tragedy, and the battle link individual experiences into a unified framework for the expatriate manager.

6. These findings indicate an expanded role for the human resource function in the organizations that send employees abroad. The role includes the importance of assisting in the process of individual sense-making before, during, and after the assignment abroad.
ACKNOWLEDGEMENTS

Several people have guided and influenced me throughout the dissertation process. Without their support, I could not have reached this point in my professional development. I would like to formally acknowledge them here and express my heartfelt gratitude for their many contributions.

Eric Neilsen, my chairman, challenged me to think beyond my initial ideas. He encouraged me to expand my thinking and to explore new avenues of research. Eric helped me to conceptualize my ill-shaped discoveries, and through our conversations, my ideas developed form and substance. Even while on sabbatical leave in Belgium, Eric continued to remain available to me so that I might finish this process on schedule.

Susan Taft, the outside person on my committee, took considerable time out of her extremely busy schedule to read each of my drafts in this lengthy process of writing and re-writing my manuscript. With each draft, she edited and made suggestions that significantly improved my work. I am deeply indebted to Sue not only for her attentiveness to the process but also for her ability to support me emotionally through some very difficult moments of discouragement and self doubt. I have learned important lessons in how to foster cognitive and emotional
development and the interdependent relationship between both from Sue. I feel that I am a better teacher because of the model that Sue has been to me.

Michael Manning contributed greatly to this project. Mike encouraged me to look at the logic of the process of writing the dissertation. And when I told him that the process was not linear for me but more a process of looping out and circling back to re-visit original assumptions and conclusions, Mike even found an inherent logic in that and helped to structure what to me seemed chaotic. I am deeply grateful to Mike for being so sensible and helping me to see that the dissertation process is only one step in a life-long process of writing and research.

Ron Fry, the fourth member of my committee, has a wonderful sense of humor. I realized, as my study and writing progressed, that the only way I would survive would be to keep my own comical (some might say perverse) view of the world. I could count on Ron to humor me. Ron kept me from taking myself too seriously.

Without the unique contributions of each of the members of my committee, this project could never have been completed. For each individually and for their collective talents, I would like to express my deepest appreciation.
I owe considerable thanks to my family - Alan, Aaron, and Barbara. Aaron, my son, has been supportive and caring through the long process of my graduate education. I have watched him grow and develop into a fine young man who will be going off to college himself just as I am finishing. I have learned from Aaron patience and an appreciation for the small wonders of life. I value his friendship. Barbara, my daughter, has learned independence because, at times, she seemed to have no choice. She too has developed into an extremely strong and sensitive person. She sensed my moods, and provided the love and affection that I so often needed. To both of my children, I am eternally indebted. Alan, my husband, often joked that he hoped that we might be able to stop paying tuition for me before we started paying tuition for the children. Well, we just made it. But the financial support was small in comparison to the other ways in which he helped me to accomplish my goals. He gave up time together so that I could work; he listened to my ramblings as my ideas took shape; he became my sounding board when things were difficult; he even took our children and three of their friends away for a week so that I could write without interruption. I know that I could not have completed this process without Alan. Most of all, after all these years, he still makes me laugh.
I owe considerable thanks to the expatriates who took the time to tell me their stories. For some, the process was enjoyable, and they spilled out their experiences with great relish. But for others, the process was painful and brought back unresolved issues for them. But whatever the experience, each expatriate took the time to confide in me very personal memories. Without their stories, this research would not have been possible, and without the cooperation of the companies they worked for, I could not have gained access to these managers. I am genuinely appreciative to the business community that participated in this study and recognized their central role in the development of practical knowledge.

I am grateful for the support of my many friends. Joyce Osland, Linda Pierce, Kathy Feather, Margaret Ferrara, and Martha Sommers have encouraged me and supported me in innumerable ways. This group of caring individuals has been my safety net over the years. I value and respect each of them. My life is richer because of these women.

To my father, Carter Cort, I am grateful for his love and the example of achievement and hard work that he gave me. To my mother, Barbara Cort, who did not live to see this, I am grateful for her constant reminder as I was growing up that I could do anything I wanted if I just
applied myself. She set a glowing example of strength and optimism even in the most difficult situations imaginable. But most of all, my Mother taught me an appreciation for and a love of stories.
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CHAPTER 1

Introduction and Review of the Literature

Introduction

The world economy is becoming increasingly interdependent. International businesses link national economies through natural, human, and capital resources. This growing interdependence has been referred to as the globalization of the world economy. Although U.S. firms took the lead in international businesses at the turn of the century and actively helped to create the current interdependence of world markets through foreign direct investments and technology transfers, we have found ourselves disadvantaged in our ability to compete in this emerging global environment.

One look at the current U.S. trade position illustrates the changing composition of world trade relationships. The U.S. has declined dramatically in its portion of world market share. "In the late 1950s, the United States accounted for nearly 20% of world exports, yet by 1986 this figure had declined to nearly 11%. Concurrently, however, the U.S. share of world imports rose from 14% to 19%" (Czinkota, Rivoli, Ronkainen, 1989, p. 9). This changing composition of world trade relationships indicates a decline in the competitiveness of U.S. firms in foreign markets. Reasons for this
decline include national policy goals, blind faith in U.S. entrepreneurship, U.S. financial support of the rebuilding of foreign economies after the war, a greater number of foreign firms entering the international marketplace, and a complacency among U.S. industry leaders. U.S. companies must be able to compete successfully in the global marketplace if we are to maintain U.S. jobs dependent on exports and decrease the substantial U.S. international debt that left unchecked will eventually erode our domestic markets.

**Increasing the International Competitiveness of U.S. Firms**

To increase international competitiveness, U.S. companies must respond in specific ways. The following statements are taken from the recent crop of international business textbooks and help to shape a corporate response.

The changing economic, social, and political environments around the world has had a profound impact on international business and will continue to do so. The future of multinational enterprises depends heavily on their ability to anticipate rather than react to significant future events, analyze their impact on the enterprise, and incorporate that analysis directly into corporate planning and decision making. (Robock & Simmons, 1983, p. 600)

In order to survive in this world of abrupt changes and discontinuities, of newly emerging forces and dangers, and of unforeseen influences from abroad, firms need to prepare themselves by developing active responses. New strategies need to be envisioned, new plans need to be made, and our way of doing business needs to change . . . Leadership
is not retained through passivity but rather through continuous, alert adaptation to the changing world environment. In order to stay on top firms need to participate in the changes that take place, respond with timely innovation and creativity, and recognize newly emerging trends at very short notice.
(Czinkota, Rivoli, & Ronkainen, 1989, p. 17)

Doing business internationally entails a movement into new and diverse economic, political, and cultural settings, and a firm's ability to recognize and adapt to these environmental differences will usually determine the success or failure of its international initiative. (Weekly, Aggarwal, 1987, p. 42)

These statements emphasize the need for a proactive response that anticipates change and adapts appropriately. These statements also illustrate the pivotal role of human resources in this process and specifically the role of the expatriate manager. It is through human sensing mechanisms that change is anticipated and responses formulated.

The Role of the Expatriate Manager

Harris and Moran in their book Managing Cultural Differences (1987) recognize the central role of the "transnational manager." The authors suggest that "transnational managers" will lead in not just organizational transformations but in global transformations. They state:

Executives in transnational enterprises should join the common struggle for a world cultural rebirth, and assist in conjuring up the new visions that will energize or motivate the human family . . . Whereas in the past such transformation was caused by great innovators, today many people participate in the resymbolization task. It is the authors' thesis
that transnational managers, because of their knowledge and experience, are in an unusual position to join in the process of renewal. Their role in global enterprises offers an opportunity for recreation of cultural assumptions, norms, and practices on a planetary scale. (p. 5)

Rosalie Tung in *The New Expatriates* expresses another perspective on the central role of the expatriate manager. She says:

It is my contention that human resource planning is pivotal to the successful operation of a multinational corporation because technology, capital and know-how could not be effectively and efficiently transferred from corporate headquarters to the various worldwide subsidiaries without using human power. Any attempt at economic restructuring, industrial revitalization, or industrial targeting is destined to fail if adequate attention is not given to the planning, management, and deployment of human resources required in these efforts. There are many stories of how blundering American expatriates lose substantial portions of their existing or potential market shares to foreign competitors in the international marketplace for this very reason. (p. 1)

My own experiences also support the view that expatriate managers are central to the success of U.S. corporations abroad. In the fall of 1988, I had the opportunity to spend four weeks in Europe studying the European Economic Community. During those four weeks, I had the opportunity to talk with representatives at the European Community headquarters in Brussels about the specifics of the 1992 initiative. I also spoke with executives in several U.S. and European multinationals regarding corporate strategies for the coming of 1992.
It was impossible not to be exposed to the common citizen's perspective because European integration seemed to be the focus of my informal conversations as well.

It was during these four weeks that I came to realize that the European Community is a constantly evolving phenomenon. The shape that the community will eventually take is still unclear because the control of the process shifts from political leaders to corporate executives to the governing institutions of the European Community to the individual in the street who will be directly affected by policies and actions. This thing called the European Economic Community is in a continuous process of metamorphosis. Because of the experimental nature of this process, the outcomes can be influenced. U.S. corporations can have an influence on the direction of policy and our relationship to this growing economic power. But we cannot have influence if we do not understand or our understanding is distorted by fear or if we are unable to immerse Americans in the evolving culture of the European Community to convey our interests and participate fully in economic strategies. The expatriate manager is central to this process.

U.S. corporations cannot hope to be proactive in their response to international developments either in Europe or other parts of the global economy if we do not
have human resources abroad who can identify emerging
trends and potential changes. The U.S. manager working
and living abroad is in a unique position to gather
information for the parent organization regarding current
economic activities, but perhaps even more importantly,
expatriates come in contact with current attitudes that
will result in future economic activities. This informa-
tion is available to the expatriate manager whether that
individual is managing technologies or people in foreign
cultures. As corporate stakeholders, quasi-diplomats,
and cultural representatives, the expatriate manager is
pivotal to our future competitiveness abroad (Shahzad,
1984).

High Failure Rates Abroad

Although the expatriate manager plays a pivotal role
in our ability to compete abroad, current research
indicates that premature return rates are high and these
returns are costly to the organization (Baker &
Other than monetary costs, these premature returns are
also costly in what Medenhall and Oddou (1985) call
"invisible costs." These costs refer to the human costs
to the expatriate of a loss of self-esteem and self-
confidence and a loss of prestige among one's peers.
Tung (1988) suggests that her research indicates failure
rates of 10% to 20% in half of the multinationals surveyed and as high as 30% in some 7% of the respondent firms. Tung (1988) defines failure as "an inability of an expatriate to perform effectively in a foreign country, resulting in his being fired or called home" (p. 2). Harris and Moran (1979) report a return rate of about 33% for families of U.S. citizens working overseas.

Review of the Literature

Current Research Perspectives

Researchers in the field of international human resource management have responded to these high failure rates by identifying several variables that appear to affect expatriate manager success. These variables include organizational control mechanisms (Shahzad, 1984), training methodologies (Maisonrouge, 1983; Mendenhall & Oddou, 1986; Tung, 1981), and selection procedures (Tung, 1981). Tung (1987) identified specific factors contributing to expatriate failure. These included the inability of the spouse to adjust, manager's inability to adjust to differences, manager's personality or emotional immaturity, manager's inability to cope with responsibilities, lack of technical competence, and lack of motivation to work overseas.

Acculturation research examines overseas adjustment of managers. A review of the literature by Mendenhall
and Oddou (1985) revealed four dimensions of expatriate acculturation. Components of the expatriate adjustment process were identified. These components were (1) the "self-oriented" dimension; (2) the "others-oriented" dimension; (3) the "perceptual" dimension; and (4) the "cultural toughness" dimension (p. 40). The self-oriented dimension involves the ability of the expatriate to develop parallel activities abroad, cope with stress, and have confidence in one's ability to accomplish the assignment abroad. The others-oriented dimension consists of the ability to develop relationships and communicate with host nationals. The perceptual dimension is the ability to understand why foreigners behave the way they do and to be nonjudgmental and nonevaluative when interpreting the behavior of host nationals. The cultural-toughness dimension indicates that some cultures have less permeable boundaries. Therefore, the countries with greater cultural barriers cause greater difficulty in expatriate acculturation. This research also notes that there is little knowledge about the cognitive dynamics in the perceptual dimension. Implications of this review for expatriate selection and training are proposed. Psychological tests to measure abilities to deal with stress and rigidity and flexibility of any individual's perceptual and evaluative
tendencies are proposed. Extensive evaluations from the potential expatriate's associates could gauge interpersonal skills. Finally extensive evaluation of expatriates being assigned to culturally-tough countries would require significantly more aptitude for those selected.

Austin Church in his article "Sojourner adjustment" (1982) reviewed the research in the psychological literature on the psychological adjustment of relatively short-term visitors to new cultures. This review is extensive and focuses primarily on foreign exchange students but also includes Peace Corp volunteers, missionaries, technical assistants, businessmen, and professional scholars. Sojourner adjustment is a broad term including culture shock, the emotional well being of the sojourner, attitudinal, academic/professional, and social adjustments and outcomes in the host culture. The results of the review are summarized in Figure 1.1.

Interestingly, Church notes that there are limitations to each approach. He closes with the following statement:

Understanding of the dynamics of sojourner adjustment will be facilitated by a deemphasis on studies that enumerate sojourner problems and outcomes, especially through the use of superficial survey techniques, and by increased emphasis on more intensive, longitudinal studies of individual patterns of coping and adjustment. In addition, the generality and validity of findings will be increased with the use of more diverse methodologies. (p. 563)
Figure 1.1: Summary of literature related to psychological adjustment of short-term visitors to new cultures as reported in "Sojourner adjustment" by Austin T. Church, 1982.

<table>
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<th>Focus of research</th>
<th>Specific emphasis</th>
<th>Representative Findings</th>
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| Descriptive         | stage descriptions            | five stages of transition to cultural awareness  
contact phase  
disintegration phase  
reintegration phase  
autonomy stage  
independence stage  |
| U curve of adjustment|                                | adjustment is a function of time  in the new culture  
initial optimism  
subsequent trough  
gradual recovery  |
| patterns of adjustment|                              | detached observers  
constrictor  
old-style types  
adjusters  
enthusiastic participants  
idealists  
new style types  |
| cultural learning   |                                | operative conditioning and social learning principles  |
| Nature and Extent of Problems Encountered | foreign students | language, homesickness, racial discrimination  |
|                     | other sojourner groups        | time, human relations, cultural differences  |
| Background Variables | background and demographic characteristics | nationality status  
previous cross-cultural experience  |
| Situational Variables | external conditions | social interaction  
overlapping membership conflict  |
| Personality Variables | expatriate attitudes and values | ego strength  
authoritarianism  
self-esteem  
self-acceptance  
extroversion  
leadership  
maturity  
manifest anxiety  
long-term focus  
inner-directedness  |
| Sojourner Outcomes | measures of effectiveness | personal growth  
performance  |
| Cross-Cultural Counseling | psychological counseling relationships | language barriers  
objectivity  
cultural perceptions of counseling  |
The methodologies to which he is referring are "in-depth interviews, intensive case studies, autobiographies, naturalistic and participant observation, cultural distance scales, small group experiments, and various unobtrusive measures" (p. 561).

Researchers in the field of social psychology have also brought their methodologies to bear in trying to gain critical insights into the experience abroad. This research focuses primarily on the problems of individual adjustment and the relationship of the expatriate to himself, to others, to the environment, and to his/her activities within the host culture. Central to this research is the individual as a proactive force in the interpretation and creation of the experience. Much of this research emphasizes the importance of the subjective view of the expatriate in the development and outcome of the experience.

Alfred Scheutz (1944) in his essay "The stranger: An essay in social psychology" acknowledges the impact of the experience of trying to enter another group on the individual and the importance of the individual's orientation and interpretation to the outcome of the experience for the individual. Scheutz states:

The cultural pattern peculiar to a particular social group functions for its members as an unquestioned scheme of reference. It determines the strata of relevance for their thinking as usual in standardized
situations and the degree of knowledge required for handling the tested recipes involved. The approaching stranger, however, does not share certain basic assumptions which alone guarantee the functioning of these recipes . . . A thorough modification of his schemes of orientation and interpretation and of his concepts of anonymity, typicality, and chance is the prerequisite of any possible adjustment. (p. 499)

Peter Adler (1975) in his discussion of the potentially positive effects of culture shock also recognizes the role of individual perceptions in the cross-cultural experience. He says:

As a gestalt, the transnational experience is a set of intensive and evocative situations in which the individual perceives and experiences other people in a distinctly new manner and, as a consequence, experiences new facets and dimensions of existence. (p. 18)

Although you may disagree with Adler's developmental perspective, the central role the individual's perceptions and interpretations in the experience is underscored in his research.

In his study of Peace Corps workers in Botswana, Hoyt Alverson (1977) supports the importance of the individual's meanings and interpretations in the outcomes of assignments abroad. He states that

. . . to know the conflicts and problems faced by a person entering a new community, we must come to know the conflicts of meanings in subjective consciousness. (p. 275)

Alverson also indicates that individual meanings are difficult to assess because they are "only in small part signaled or manifest in overt behavior."
Ingemar Torbiorn (1982) develops a theory of subjective adjustment in which individual perception is guided by internal frames of reference that structure the individual's experience and "inject it with substance and meaning." The relationship of these frames of reference to individual adjustment in a foreign environment is also explored. These frames of reference are the basis of Torbiorn's theory and further indicate the importance of individual interpretation, meanings, and sense-making to our understanding of the experience abroad.

Although the previously discussed research indicates the importance of individual interpretations, meanings and sense-making to individual adjustment and outcomes, no research was found that examines directly the subjective meanings of expatriate managers for the assignment abroad.

Albert Bandura's work (1978) in the field of reciprocal determinism recognizes the complex relationship between human cognitive processes and other "internal events" on behavior and the external environment. This study of expatriate managers does not intend to imply that human cognitive processes and other "internal events" are the only or most important elements of the assignment abroad. But this research does assert that individual cognitive processes are equal to other
factors influencing a situation.

Purpose of the Research and Research Questions

Because the subjective experience of the individual is so central to the experience abroad and because there is a paucity of research that explores the particular frames-of-reference, meanings and sense-making of U.S. expatriate managers, the study reported in this document was conducted. The focus of the research is the U.S. expatriate manager. Central to this study are the subjective experiences of American managers working abroad for American companies. The primary purpose of this research is to increase our understanding of the expatriate experience from the perspective of the individual. This research is exploratory and descriptive and the initial stages of the study were driven by the following questions:

1. How do expatriates symbolize the managerial experience abroad?

2. What are the primary frames of reference and individual interpretations that serve as the basis of thought and action while abroad?

3. How am I, as a researcher, to gain access to these individual theoretical conceptualizations without imposing my own suspicions or a set of organizational assumptions about what should occupy the thoughts of expatriate managers? How can I leave myself open for surprises?

The Search for a Methodology

The nature of the research questions dictated an
inductive approach to the study. To discover expatriate managers' subjective interpretations and meanings, primary data needed to be obtained that would allow the subjects to self select that which was meaningful from the experience and provide access to personal constructs. Four returned expatriates at the corporate offices of a large manufacturing company in Cleveland, Ohio agreed to talk about their experiences with me as a way of discovering artifacts of their experiences that could be used in my research. We talked for over two hours, and during that time, I became aware that each of the expatriates seemed to bundle the experience in stories. These stories were anecdotal, and as each expatriate would share a story, others in the group would build on this story by recounting a related experience. Roger Harrison and Richard Hopkins (1967) note a similar observation in their research to develop an alternative cross-cultural training program. They write:

It is not unusual, for example, for returned Peace Corps Volunteers working as staff in a Peace Corps training program to see their overseas career as a kind of kaleidoscope of impactful, difficult, rewarding, but essentially unconnected, experiences. The returned Volunteer often does not have a clear conception of the processes which he used to adapt himself to the culture, to develop sources of information, or to formulate and test hypotheses about problems. When he communicates to trainees he often communicates at the level of 'war stories.' (p. 445)

Harrison and Hopkins also note that learning has
occurred while abroad, but that learning is largely implicit and latent. Harrison and Hopkins indicate that this learning remains at the anecdotal level because the individual is either unable or not given the opportunity to surface his/her own sense-making of the experience.

Berger and Luckman (1966) in their seminal work on the sociology of knowledge explain the telling of stories as the second step in the legitimation of meaning. Legitimation is the process of transforming concepts into symbolic universes. Berger and Luckman state,

"The totality of the individual's life, the successive passing through various orders of the institutional order, must be made subjectively meaningful. In other words, the individual biography, in its several, successive, institutionally predefined phases, must be endowed with a meaning that makes the whole subjectively plausible. (p. 86)"

The story is the second level of legitimation that contains theoretical propositions in a rudimentary form. The expatriate stories may represent an attempt by the individual to integrate the experience abroad into the symbolic universe of the institution (culture, home organization, host organization).

Based on my own discussions with the expatriates at the original site in Cleveland, Ohio and the observations of Harrison and Hopkins as well as the role of stories in the legitimation of meaning, I began to explore the possibility and value of using expatriate stories as the
artifacts from the experience abroad that could provide me with insights into subjective interpretations and meanings. One way to begin this process would be to examine the use of stories for conducting current research. The following section examines the story as a source of data. But before this research is presented, it would be useful to have a definition of a story.

To define the concept of story appears at first to be a rather simple task. We have all grown up with stories, and if asked, we would each be able to identify a story if we heard one. But, upon further investigation, defining what is a story is no simple task. For this phase of the research, a general definition of story will be used. This definition will be refined later to more clearly articulate the specific data used in this study.

story (stor i, sto ri), n. the telling of a happening or connected series of happenings whether true or fictitious; narrative is a more formal word and more often implies a true story than a fictitious one; tale, a somewhat elevated or poetical term, usually suggests a simple leisurely story, more or less loosely organized; anecdote applies to a short, entertaining account of a single incident, usually personal or autobiographical. (Webster's New World Dictionary, College Edition 1960)

The word story will be used at this point synonymously with the terms narrative, tale, and anecdote. The next section explores the use of story as data in the research.

The Story and Narrative as Research Data

Albert Carter (1986) in his fascinating discussion
of the relationship between literature and medicine describes the story as a representation of a "body event" that "favors pluridimensional words with associations, affect, expressive imagery, and the kind of imagery Dr. Pilkington would never allow in a chart" (p. 145).

Carter goes on to say that the story fulfills the need of the patient to "look feelingly in a way that would plumb the emotional, intellectual, even spiritual implications of the body event" (p. 149). Carter's work suggests that the story could be a source of valuable information about the intensely personal experience of illness from the patient's point of view.

Oliver Sacks (1986) writes of "clinical tales." He speaks of the tale as the patient's description of "what he or she has been feeling or experiencing in the realm of illness." He conceives of the patient who is experiencing severe illness as striving to preserve an identity. He describes the individual as a "struggler" or "warrior" at the existential level. Then Sacks reasserts the importance of the tale as a vehicle into this personal struggle. He states:

With this (struggle) there is a return to narrative, but a narrative going beyond the simple sequence related by the patient, toward a sort of allegory or epic, of the perils, the adventures, of a centrally-embattled 'I,' fighting a fight as strange as that of any fable or myth. (p. 17)

Joanne Trautmann Banks (1986) acknowledges the use
of the story as data in a variety of fields as a way to humanize disciplines. She comments:

The concept of story as a mode for thinking about our culture has recently come into widespread use. Sophisticated literary scholars have mined narratology, while writers in religion, philosophy, psychology, history, the visual arts, and even science have warmed up to story as a means of rediscovering the narrative aspects of their fields and modifying the harshly technical elements in them. (p. vii)

Sociologists and anthropologists have had a long history of using stories as a way of uncovering the mysteries of a culture. The analysis of fable and myth pepper the literature. These stories are analyzed for the underlying meanings on which the culture is constructed and provide critical access to the values and motivations of a people. It is assumed by most researchers that members of a culture are so ingrained with these common meanings that they are unwilling or unable to articulate these meanings directly. So the story becomes a method for unearthing these subjective interpretations. Livia Polanyi represents this perspective in her book *Telling the American Story A Structural and Cultural Analysis of Conversational Storytelling* (1985). She says:

I do not believe that the method of cultural analysis which I am proposing here is, by any means, the only way to reach cultural primitives. As contemporary anthropology makes clear, there are many. However, I do believe that an associative expansion of the obvious is one important method. Similarly, while many texts can provide insight into
a culture, I believe that conversational stories and tales are one widely available access route to folk truths and values. (p. 1)

Mary Gergen also makes a strong case for the value of stories/narratives and their importance in people's constructions of their lives. She states:

> When the individual attempts to understand him/herself, these culturally embedded forms (narratives) furnish a repertoire of sense making devices. It is through embedding one's actions within one or more of these forms that one's actions take on meaning; they belong to a person with a certain past, heading in a certain direction, and with a future that will represent an extension of this past. Yet, as we have also proposed, narrative constructions are not the mere product of cultural history. The particular form that they acquire for any person is an outgrowth of the social relationships in which one is currently embedded. One's narratives typically include the positioning of others in relationship to oneself. (p. 96) Organizational research has been less inclined to use stories as units of analysis. One notable exception is the work by Mitroff and Kilmann (1976a). They state:

> Man lives by stories. He is a natural, born storyteller. In virtually every epoch and culture, he has frequently invented stories to give meaning and order to his world and to his life. (p. 189)

Mitroff and Kilmann describe the story as "some of the best and most natural materials for studying the human psyche in its purest form" (p. 189). They go on to question and attempt to answer the reasons why stories are not systematically studied in organizational literature. They posit:

> It is our contention that one of the main factors responsible for such lack of systematic study and interest is that we are largely the victim of one of
our own myths; namely, what we believe constitutes the proper focus of the social sciences. More specifically, the problem has to do with our beliefs regarding what constitutes valid data for the 'proper study' of organizations. (p. 191)

Mitroff and Kilmann (1976b) argue in another article for the utilization of qualitative approaches to management science. Specifically, they assert that different personality types are attracted to different forms of inquiry. Forms of inquiry are largely a function of personality types and primary modes of taking in and processing information. Stories, no matter how carefully structured the analysis, lend themselves to subjective interpretation and a lack of quantification. To many in the management sciences, the interpretive approach, engendered by stories as data, reflects a less valued, less useful approach to the search for knowledge.

Joanne Martin (1982) suggests that the focus on stories in organizational research reflects a specific approach to organizational theory. The approach that is labeled rational conceives of the organization as a set of "observable, measurable social facts." The rational approach to organizations emphasizes explicit forms of communication. Examples of explicit forms of communication, according to Martin, include quantitative figures, rules and procedures, and abstract policy statements. A second approach to organizational theory conceives of the
organization as idea systems, the meaning of which must be managed. While the first approach emphasizes explicit communication, the second approach focuses on implicit, symbolic forms of communication. Stories are one of many forms of implicit communication.

Joanne Martin demonstrates her own preference for using organizational stories to understand organizational information that is not easily communicated using explicit forms. This information includes organizational culture, beliefs about process, management philosophy, and organizational policies requiring nonfinancial rationales (p. 258). Specifically, Martin explores the relationship between organizational stories and organizational commitment. Through a series of studies, Martin examines the impact of a story, an explicit statement of data, and the combination of data and a story on recognition, belief, and persuasiveness. In general, Martin's research highlights the value of a story for conveying specific types of organizational information.

In a later article co-authored by Joanne Martin and Caren Siehl (1983), two books written about General Motors are analyzed and the values within an organizational culture and counterculture are identified. Although the specific procedures used to content analyze Ed Cray's *Chrome Colossus: General Motors and Its Times*
and J.P. Wright's *On a Clear Day You Can See General Motors* are not explicated, the results of the analysis emphasize stories as sources of core values, corporate ideology, management philosophy, and "deeper assumptions" which rest at a preconscious level of awareness. (p. 53)

Joanne Martin and Melanie Powers (1983) in "Truth or corporate propaganda: The value of a good war story" further explore the impact of stories on increasing organizational commitment. They found that a story will increase organizational commitment if the story is consistent with pre-existing values and beliefs. The work by Joanne Martin continually identifies stories as important cultural artifacts that embody the more tacit forms of organizational and individual knowledge.

In the same vein as Martin, Alan L. Wilkins (1983) justifies the use of stories as data in studying organizations. Wilkins states:

Though anthropologists have found the myths and legends of primitive tribes critical to an understanding of these social groupings, students of contemporary work organizations have with few exceptions neglected related phenomena such as stories and legends . . . The stories are important indicators of the values participants share, the social prescriptions concerning how things are to be done, and the consequences of compliance or deviance. The stories may also indicate the social categories and statuses which are legitimate in the organization and thus an important guide to what kinds of people can do what. Such information is crucial for the successful participation of organizational actors. (p. 82)
Wilkins describes the story as a symbol that focuses on the communication of "internal states through the means of tangible formulations" (p. 83). These stories become behavioral control mechanisms in organizations by conveying shared values and assumptions. Consistent with the work of Joanne Martin, Wilkins concludes that stories are more memorable than explicit forms of communication. Wilkins also concludes that stories tend to generate belief and encourage attitudinal commitment by organizational participants. Martin's work qualifies the cognitive and attitudinal effects of stories, but generally, Wilkins' conclusions reinforce the view that the story "may communicate a perspective, an approach to problem solving, implied causal relationships, and deep-seated values" (p. 90). And because of the controls implicit within the organizational story, we have an obligation to study these artifacts.

Other important contributions to our understanding of the story as data come from an article by Gordon H. Bower entitled "Experiments on story understanding and recall" (1976). This article identifies the constituent structure of a story. This structure consists of a set of abstract elements such as a setting, characters, a plot, episodes, and resolutions. Although these constituent parts are used to identify their impact on
understanding and recall, these parts also provide a grammar or syntax of the story assisting in the discovery of individual constructs embedded in a particular narrative.

The research reported in this section establishes some important conclusions regarding stories as natural artifacts of the human condition and critical data for understanding the subjective experience of a manager abroad.

**Stories as Data**

1. The story form allows for the use of pluridimensional words that express the emotional as well as intellectual nature of human experience.

2. The story becomes an allegory of the struggle for self preservation.

3. Conversational stories are one route through which individual values and realities can be conveyed.

4. Storytelling is a natural, human process that projects the content of the individual psyche.

5. The story as data recognizes the subtle, more intuitive ways that individuals process their experiences.

6. The story encourages the subject to self-select and structure the telling of the experience based on the individual's perception of what is significant.

The above mentioned characteristics of the story indicate the value of the story as a source of data about the
subjective experience of the expatriate manager. For this reason, the story is used as the primary source of data for this study. But the actual artifact that the term "story" refers to is still unclear.

Considerable disagreement exists in the literature about what actually constitutes a story. Thomas Leitch (1986) emphasizes the oral ("diegetic") quality of the narrative. He also notes that events are perceived sequentially. Mary Gergen (1988) identifies stories as "coherent unfolding narratives of human conduct."

Wallace Martin (1987) takes a more literary rather than anthropological view of the narrative and describes it as "original, realistic stories fixed in print." How can we reconcile the conception of an oral, unfolding account with a formal, static literary form? Livia Polanyi (1985) defines stories as:

Narratives are kinds of discourse organized around the passage of time in some world. In narrative discourse of all sorts, a time line is established, demarcated by discrete moments at which instantaneous occurrences (events) take place in a world created through the telling. (p. 10)

Polanyi's definition is consistent with the purposes of this research but does not recognize the larger narrative in which certain events may be recounted that might include individual explanation and connecting phrases. This study defines story as:
A sequence of related events that occurred in the past, told orally, and demarcated by discrete verbal markers (i.e. "There was this one story...", "I remember one time...") A story has a consistent structure that includes a setting, characters, plots, and themes.

A narrative is defined as:

A series of stories told orally in one sitting by a single storyteller including connecting phrases and explanations.

For the purposes of this research, the story becomes a subset of the narrative and both the story and the narrative become data for discovering the subjective world of the expatriate manager.

The literary and oral tradition of narrative analysis will both be used to examine the data. This combined approach focuses on verbal cues, such as; inflection, tone, rate of speech as well as literary elements, such as, point of view, characterization, plot, and scene. This double approach will allow for the identification of those elements, events, and justifications that the expatriate chooses to emphasize and also the underlying meanings and interpretations that remain implicit or tacit. The specific methodology will be explained in detail in the methodology chapter.

Summary

This chapter has explored the globalization of the world economy through the interdependence of markets.
The inability of U.S. companies to compete fully and effectively in this increasingly complex environment was also noted. The expatriate manager remains pivotal to our competitiveness in the future and yet high failure rates among U.S. expatriate managers are documented in the literature. The subjective interpretation of the experience by the individual expatriate has a significant impact on individual behaviors and the resulting effectiveness and image of the U.S. company operating abroad. For this reason and because of a paucity of research in this area, the subjective experience of the expatriate manager is the focus of this research.

The story and narrative are sources of vital information about individual values, meanings, relationships, and sense-making mechanisms. The use of stories as research data has been documented in the literature of the humanities, social sciences, and natural sciences. For these reasons the story and narrative will be used as sources of data for this study into the subjective experience of the U.S. expatriate manager.

Chapter 2 will refine the focus of this study, present the specific questions that guided this research, define relevant terminology, and propose limitations.
CHAPTER II

The Research

Throughout the preface to this study, the subjective experience of the expatriate manager has been referred to. Before a succinct statement of the specific research questions can be presented, subjective experience must be defined. The subjective experience of the expatriate is used here to refer to that part of the assignment abroad that is produced by human cognitions. The cognitions include interpretive processes that explain and give meaning to the experience abroad for the individual. Broadly defined, subjective experience is a set of mental constructs that are central to individual sense-making.

Research Questions

1. What are the contextual components of the expatriate experience as delineated and interpreted by individuals having worked abroad as managers?

2. What are the recurring subjects or ideas within or across stories and narratives that reflect significance for the individual expatriate? These recurring subjects or ideas are referred to as narrative themes.

3. What is the relationship of these themes to organizational and individual objectives abroad?

4. What are the images and metaphors that function as personal frameworks of analysis for the manager abroad?

5. What are the implications of these images and metaphors for expatriate behavior and organizational outcomes abroad?
Definition of Terms

Expatriate Manager - For the purposes of this research, the expatriate manager is an individual who withdraws him/herself from residence in the native country for the purposes of managing others or providing technical expertise to an organization abroad. This definition further limits expatriate managers to American nationals working for organizations outside the geographic boundaries of the United States.

Contextual Components - Contextual components are the common variables (things that are the same to many individuals) in expatriate managers' experiences abroad. They can be characteristics of a person, environment, or situation and can vary in detail from person to person, environment to environment, or situation to situation. The contextual components in this research are further divided into those elements of the context that are similar across the sample and the individual interpretations of those elements.

Themes - Themes refer to the construction of significance. Themes are the subjects or ideas that recur within or across stories or narratives. The theme is implicit within the narrative and may or may not be the most significant element of the narrative as explicitly stated by the expatriate.
Images and Metaphors - Metaphor is best defined in the literature and is used in this study as described in the following quote:

Metaphor is, at its simplest, a way of proceeding from the known to the unknown. It is a way of cognition in which the identifying qualities of one thing are transferred in an instantaneous, almost unconscious, flash of insight to some other thing that is, by remoteness or complexity, unknown to us. The test of essential metaphor, Philip Wheelwright has written, is not any rule of grammatical form, but rather the quality of semantic transformation that is brought about. (Nisbet, 1969 as cited in Turner, 1974)

Story - Story has been defined previously, but the definition will be repeated here. A story is a sequence of related events that occurred in the past, told orally, and made discrete by verbal markers. These markers include statements, such as; "There was this one story . . .", "I guess that's the end . . .", "I just thought of another story . . ."

Narrative - A narrative is a series of stories told orally in one sitting by a single narrator and includes connecting phrases and explanations.

Limitations of the Study

This study has several limitations. First, the subjects were limited to U.S. expatriate managers. Other cultural groups of managers would have added depth to the conclusions and greater generalizability. Other cultural groups might have indicated the culturally dictated
aspects of subjective experience or perhaps the commonalities of the experience that transcend cultural imperatives. But the subjects for this research were limited to U.S. managers primarily because of accessibility. Future research should explore the narratives of managers from several cultures. A regional bias may also have been present because the sample was drawn only from the metropolitan Cleveland area although 8 subjects were not native Clevelanders.

A second limitation has to do with the size of the sample. Fifteen expatriate managers participated in the research and provided fifteen extended narratives and thirty-eight stories. Although the sample was limited in size, the expatriates in the study did represent a fairly heterogeneous group in terms of companies represented, type of job overseas, and country of assignment. Subjects represented 10 different companies. The companies include a legal firm, a tire and rubber company, an accounting firm, a chemical company, a ceramic parts producer, an automotive and aerospace parts producer, an electronics firm and a bank. The occupations of the subjects were 6 general managers, 5 engineers, 1 auditor, 1 chemist, 1 attorney, and 1 technical director. All but two of the subjects were married. One subject was divorced while abroad. All of
the married subjects except one had children who accompanied them overseas. Three of the subjects had their first child born while abroad. Countries to which the subjects were assigned included England, The Netherlands, Belgium, France, South Africa, Argentina, and Mexico. Appendix B summarizes the expatriate demographics.

The limited number of participants in the study do limit the generalizability of the results. Recognizing this limitation, wherever possible the results are supported with the findings from other research that implicitly or explicitly support the findings of this study.

Only two women participated in the study and one was omitted from analysis because she did not wish to be audiotaped. I regret that more women were not in the sample. Because of the lack of women subjects, comparative data based on gender is not available. Although differences in subjective experiences as related to gender are not the focus of this research, I feel that we as researchers must encourage the inclusion of representative groups of women in our studies. This is especially so when the value of women as expatriate managers is often debated in the literature.

Generalizability is limited by the size of the
sample. But this research represents what could be an initial stage in the future development of related research that would broaden the sample and extend the results. A primary purpose of this study was to develop a methodology and pose some tentative conclusions about the subjective experience of the individual abroad, and this purpose was achieved.
CHAPTER 3
Methodology

Chapter 1 introduced the focus of this study and reviewed the relevant literature. Chapter 2 presented the specific questions that gave impetus to this research, defined terms, and noted the limitations of this study. Chapter 3 presents the procedures and methods for collecting and analyzing expatriate stories and narratives. This chapter begins with a description of the methodological antecedents of the particular system of analysis developed for this study.

Methodological Antecedents

The specific method of analysis used in this research was developed based on the assumptions and methods of three different but related disciplines. These disciplines are rhetorical criticism, literary criticism, and ethnography. No single approach provided all of the tools that would allow me to discover the multidimensional, subjective experience of the manager abroad using stories as the natural artifact of that experience. So a combined approach was developed that capitalized on the basic assumptions and particular methods of analysis utilized in the aforementioned fields.

The disciplines of rhetorical criticism, literary
criticism, and ethnography have one element in common that makes them relevant for this research. For each, language is the central unit of analysis. The analysis of the symbolic nature of language unifies these perspectives. But rhetorical criticism, literary criticism, and ethnography also contribute unique assumptions and methods of analysis in this study.

Central to this study is the perspective of the New Rhetorics. Early development in the late 1950's and 1960's contributed to the evolution of rhetorical criticism that is dominated by a language-action approach and a dramatistic approach. Shaped by the works of I.A. Richards, Alfred Korzybski, Richard Weaver, and Kenneth Burke, the New Rhetorics focus on the reciprocal relationship between word-thought-thing (Scott & Brock, 1980). Sonja Foss in her book *Rhetorical Criticism* (1989) identifies this approach as "methods of criticism that feature the rhetor." Foss describes the focus of this approach and its purpose in the following quote.

> These methods focus on the rhetor and are guided by the general research question, what does the rhetorical artifact suggest about the rhetor? The critic who is interested in the artifact as reflective of its rhetor generally seeks to discover how rhetors perceive and interpret the world, their inner life, and how their perspectives motivate them to act as they do. (p. 286)

Foss goes on to explain that the purpose of this analysis
of the rhetor's inner life is to determine the motives of the rhetor in the rhetorical act and to be able to design a response that addresses these motives. This approach to rhetorical criticism assumes that the critic cannot enter the heads of rhetors to discover their motives nor can rhetors readily identify these internal structures. Therefore, specific methodologies are used to provide access to these inner worlds. Edwin Black (1970) states that the choice of topic, the vocabulary used, the forms of argument selected, the amount said, the manner of delivery, and all other dimensions of our use of rhetoric serve "a symptomatic function" of a rhetor; they contain "tokens of their authors."

The methodologies of pentadic criticism and cluster analysis as developed by Kenneth Burke (1945) provide one basis for the approach used in this study. Briefly, pentadic criticism involves the (1) identification of the five terms of act, agent, agency, scene, and purpose in the rhetoric; (2) application of the ratios to discover the term or element featured by the rhetor; and (3) naming the motive from the featured term (Foss, 1989). The basic assumption underlying this method is that rhetors describe their situation using the five basic elements of a drama - act, agent, agency, scene, and purpose and emphasis on anyone in a rhetorical act
becomes the vehicle for the discovery by the critic of motive of the rhetor.

Cluster criticism, another method developed by Kenneth Burke, identifies the rhetor's motives through an analysis of the meanings that key symbols have for the rhetor. The process of cluster analysis involves the charting of the symbols that cluster around the key symbols in the rhetorical artifact. Key symbols, or symbols of significance to the rhetor are identified on the basis of frequency or intensity. If a term is used frequently in the rhetorical artifact or if the term is "extreme in degree or depth of feeling conveyed," the term becomes significant. Associative words that cluster around these key terms are charted. These clusters are then examined to identify patterns that suggest the rhetor's motives (Foss, 1989).

Both pentadic analysis and cluster analysis contributed in direct ways to the methodology developed in this study. The dramatic elements of act, agent, agency, scene, and purpose were identified and were used in part to characterize the overarching metaphors. Cluster analysis provided a method for identifying key symbols that were then analyzed to indicate theme. In addition to these specific methods of analysis, this study incorporated the basic assumptions of Burkean
analysis. The centrality of the rhetor and the focus on motives is a key element in the study of the subjective experience of the expatriate manager. Appendix 3 illustrates these methods.

Although rhetorical criticism provides important procedures for analysis, this approach does not directly address the literary elements of narrative and story that comprise the form in which expatriates bundle their experiences. The identification of theme that encompasses significant relationships, causal linkages, and personal values is not the domain of rhetorical criticism but rather the domain of literary criticism. Theories of literary and narrative analysis are extensive. The work of Mary Gergen (1988), a social psychologist, and Wallace Martin (1986), a literary critic, greatly influenced this study. Gergen's analysis of narrative structures in social analysis furnished a framework for plotting story lines. Plotting the story within time and evaluative dimensions establishes patterns within the text that may provide a clue to the underlying themes. Gergen uses this method of analysis when examining written or oral biographies of an individual's life to understand the overall evaluative dimensions of self and to "extend psychological inquiry." Useful in the analysis of expatriate narratives, Gergen's
method of plotting was incorporated into the method developed for this study. But Gergen's plotting procedures were also extended to include specific events or acts within the story line. This was done to recognize that the sequencing of events is as critical in the analysis as the individual's evaluation of those events.

Wallace Martin brought together several approaches to narrative analysis that focused on the narrative as a literary form. The domain of these approaches are the literary products of authors writing fiction. The analysis of plot, character development, and theme are central to the discovery of the meaning of the narrative. Literary analysis focuses on reader interpretation as well as author intent. Specifically, narrative analysis from a literary perspective provided this study with literary components that could be identified within the expatriate narratives. Additionally, the concept of reading theme or meaning backward as a process of retrospective sense-making was critical to the analysis of the expatriate narratives. And lastly, metaphor as a literary device became a focus of analysis in this study.

Finally, the methods of ethnography supplied procedures for this research. The ethnographic interview as developed by James Spradley (1979) became a model for
the gathering of the narratives and stories for the study. The underlying assumption of learning from people guided the collection of data in this research. The expatriate was encouraged to determine what was important and to self-select the stories to be included. Questions that probed for understanding of specific terms or phrases solicited meaning from the expatriate's perspective. This research did not use the extensive series of contacts with informants that is characteristic of pure ethnographic research, but the elements of explicit purpose, recording native explanations, and ethnographic questions were incorporated into the data collection procedures in this study. The focus of the expatriate interviews was to gather stories that reflected the expatriates' meaning for their experiences.

The methodology used in this study developed a protocol particular to the form expatriates naturally utilize in relating their experience. The methodology draws from the disciplines of rhetorical criticism, literary criticism, and ethnography to understand the expatriate managerial experience from the subjective viewpoint of the individual. The following sections describe the specific steps followed in data collection and analysis.
Data Collection

Oral rather than written narratives were chosen as the most appropriate form for accessing the subjective experience of the expatriate manager. The oral form includes vocalics that signal personal significance and meaning. Vocalics are qualities of speech and include rate, pitch, volume, and tone. Oral narratives were also selected over written narratives because the rules of grammar and good writing can restrict the representation of personal meaning. If the expatriate had been asked to respond by writing about the experience abroad, the resulting narratives might have reflected a calculated attempt to conform to syntactical rules rather than a spontaneous expression of subjective experience. The written form might also have decreased the percentage of responses because the subjects would have seen writing about their experiences as too time consuming or too much like "work." The oral form of narrative was selected for this research for the following reasons:

1. Expatriates are comfortable with talking about their experiences. Conversational narrative conveys a more personal and intimate representation of the individual experience.

2. The oral form provides important affective data that can convey greater depth of personal meaning. Vocalics are verbal signposts that signal personal significance. Vocalics are also frequently involuntary and as such are less controlled by the expatriate.
3. The oral form allows for less self-censorship due to the rules of grammar and syntax that may control the written form.

The possibility of allowing the expatriate to simply talk into a tape recorder about the experience in response to written questions was considered for this research. The advantage of this approach was that the expatriate would not have an "audience" and might feel more inclined to discuss the expatriate experience more freely. This approach was rejected because of a concern that the expatriate would imagine an audience for the recording whether one was present or not, so significant individual freedom to express would not be gained. But the cost to this approach could be a malfunction of the tape recorder of which the expatriate might be unaware and would result in the loss of important data. Also, without the immediacy of the researcher's presence, the expatriate might be able to put off completing the narrative because the task seemed irrelevant to the expatriate's primary concerns at that point in time. But most importantly the presence of the researcher allowed for follow up questions that would encourage the expatriates to expand on their personal meanings for terms they used in relating their experiences.

Because of the advantages of the oral approach and the disadvantages of data collection in the absence of
the researcher, a non-directive interview approach was
developed for this research. The non-directive interview
draws heavily from the principles of ethnography. As
James Spradley (1979) suggests, the purpose of
ethnography is not to study people but to "learn from"
people. "The goal of ethnography," as Malinowski put it,
"is to grasp the native's point of view, his relation to
life, to realize his vision of his world" (p. 3). Because the goal of this research is to develop an
understanding of the subjective experience of the
expatriate manager, a data collection procedure was
developed that encouraged the subjects to include that
which was significant and meaningful to them with minimal
indications of what the researcher thought was important.
The interview format is included in appendix A. The
interview format explained the purpose of the research as
a systematic attempt to understand the managerial
experience abroad from the perspective of the individual
who had been abroad in a managerial capacity. The
informants were encouraged to select any stories that
remained memorable from their time abroad, and they were
advised that no responses were wrong. The actual
language of the expatriates was recorded and transcribed
exactly as it was spoken. Interruption during the
telling of stories was kept to a minimum. Pauses were
used whenever the expatriates needed time to reflect. All interviews were conducted by the researcher, and the interview protocol was followed consistently throughout all interviews.

Prior to the development of the interview format, I spoke with an expatriate who had been abroad for the State Department for over twenty years. I asked this man to help me to identify those elements of the context that are relevant to the expatriate experience. I also discussed these elements with two expatriates who had spent 11 years working abroad. They confirmed the relevance of the elements to the expatriate experience. Finally, these elements were checked against the initial discussions conducted with the four expatriates prior to the development of this research, and all of the elements were referred to by one or more of the individuals as they spoke about their experiences. After requesting the stories from the subjects, specific questions were asked to create a subjective context in which to analyze character and scene. These additional questions were then used in the analysis to gain insight into elements of the stories that could help to refine themes.

**The Sample**

Sixteen expatriate managers were selected through non-random sampling. Because directories of the
population of expatriate managers are not available, a random sampling was almost impossible to achieve. The expatriates were contacted initially through an informal network of expatriates in the Cleveland, Ohio area. The original group of expatriates at a large manufacturing company in Cleveland helped to put me in contact with some expatriates in other organizations. Other expatriates for the study were found by calling organizations in the Cleveland area who were known to have facilities overseas and asking for the names of recently returned expatriates. Although this approach to the sample limits the conclusions drawn from this research, every effort was made to include expatriates from a variety of industries and representing several host cultures. Appendix B presents a profile of the expatriates used in this research.

Each expatriate provided one narrative and within these narratives a total of thirty-nine stories were related. The minimum number of stories reported by an expatriate was two and the maximum was four. One expatriate was dropped from the sample because of an objection to audiotaping. The final sample included fifteen narratives and thirty-eight stories. Each interview was transcribed, and the transcriptions and audiotapes were used as data for analysis. Participation
in the study was completely voluntary. Each expatriate was contacted by phone and asked if s/he would agree to participate. Permission to audiotape was given by each expatriate at the time of the interview, and the expatriates agreed to the anonymous use of their responses in this study.

A final characteristic of the sample was that each expatriate had returned from the assignment abroad. Returned expatriates were used because of convenience. But it is also possible to argue that the subjective experience is better created in retrospect rather than while the assignment abroad is in progress. Having completed the assignment, the expatriate is able to view the total experience and select specific stories that characterize the whole experience. But also having returned, the expatriate may have modified the subjective experience due to intervening influences such as personal rationalizations and justifications. The indirect method of gathering data may counterbalance the distortion of the experience by the expatriate.

**Interview Procedures**

The expatriates were contacted by phone to determine if they would be willing to discuss their assignments abroad for the purpose of assisting in my dissertation research. Each expatriate was told that the interview
would take from one to two hours and would ask him/her to talk informally about the experiences abroad. Each participant was assured of complete confidentiality.

At an appointed time, I met the expatriate to conduct the interview. The locations for the interviews were primarily conducted at the expatriate's place of work although there were two exceptions. One interview was conducted at a university library because the location was more central to both the expatriate and myself. Another interview was conducted at a rural inn for similar reasons. The expatriate had to be in the area on business. But no matter where the interview was conducted, privacy was maintained and interruptions were avoided. Tape recordings were made of each interview so that the exact language and form of the narratives could be transcribed for analysis. One expatriate refused to be taped, and although the interview was completed, the results were not used in the study because exact language and form could not be reconstructed.

During the interviews, every effort was made to encourage the expatriate to control the content of the narratives. Very limited information was given to the expatriate about researcher expectations. The interview was described as an opportunity for the expatriate to talk freely about self-selected segments of the
experience. Emphasis was placed on the expatriate's point of view. If the expatriate asked for an evaluation of the interview data at some point in the interview, I would say that there are no right or wrong responses to my request. Whatever they felt was representative of the experience was exactly what I was looking for. It was not until the expatriate indicated that they felt they were finished with their storytelling that I moved on to more questions about specific relationships. My own responses were kept at a minimum. I maintained continuous eye contact during the stories, and when I responded it was to indicate attentiveness and interest. My responses were not interpretive or evaluative. Infrequently, I would ask for clarification on a particular word or sequencing of events. But these requests were brief and the expatriate was always directed back to the point in the narrative where the interruption had occurred.

It is interesting to note that all of the expatriates were able to identify stories that they felt characterized their experience abroad. But several of them were also apologetic about taking up my time with what must be boring accounts. I would reassure them that I loved to listen to their stories, but the perception of several expatriates was that telling stories about their
experiences is not valued by others. This reaction infers what may be a prevailing attitude toward expatriate storytelling. The expatriate has perceived that others are not interested in the expatriate's personal experiences and that the telling of stories does not constitute appropriate behavior for expatriate managers. If this is true, this attitude becomes a destructive force in the expatriate's own sense-making and will be discussed more in the concluding chapter.

Analysis

The data for this study were content analyzed using a variety of techniques. Content analysis is defined as:

any technique (a) for the classification of the sign-vehicles, (b) which relies solely upon the judgments (which theoretically, may range from perceptual discriminations to sheer guesses) of an analyst or group of analysts as to which sign-vehicles fall into which categories, (c) on the basis of explicitly formulated rules, (d) provided that the analyst's judgments are regarded as the reports of a scientific observer. (Janis, 1949, p. 55 as cited in Brislin, 1980)

The following methods were used to identify contextual components, themes, and images or metaphors. Because the data was in a literary form, specific methods of literary analysis were used as well as pentadic analysis and cluster analysis.

To identify contextual components, the characters and scenes of each story or narrative were identified.
The specific characteristics of these components were charted for each expatriate (see Appendix C). These charts were then analyzed to determine common characteristics and specific unique interpretations of individual expatriates. The unique interpretations of each expatriate were used as additional data in the analysis of themes.

Other researchers have noted the difficulty of identifying themes. James Spradley (1979) suggests that the methods of thematic analysis are less well developed than other methods of ethnographic analysis. Spradley encourages experimentation as an appropriate approach to thematic analysis and recommends some guidelines for this experimentation. Immersion in the data and a systematic documentation of the data are two strategies encouraged by Spradley. Mary Gergen (1988) presents an even more specific approach to the analysis of oral narratives. She says that narratives (narratives are synonymous to stories in Gergen's analytical framework) have the characteristic of achieving some valued goal or endpoint. Events within the narrative occur chronologically and a range of personal evaluation of these events by the storyteller exists. Therefore it is possible to plot a story line on the dimensions of time and evaluation. This representation of the story can uncover "accounts of
employment" (p. 96).

The above mentioned approaches to thematic analysis as well as the literary approaches presented in Wallace Martin's book *Recent Theories of Narrative* (1986), contributed to the development of the systematic approach to the analysis of themes in the stories collected. Appendix D contains an example of the structural analysis of a story. Each story was plotted and a description of scene, characters, and point of view was noted for each story. Prior to this procedure each story was listened to from the audiotapes and noticeable changes in tone, rate, inflection, and volume were noted on the transcript. Wherever the vocalics contradicted the words, this was also noted.

After the transcriptions were coded for vocalics and the stories charted on the time/evaluation dimensions, each story was read repeatedly. The chart of contextual components, the transcripts, the structural analyses were all reviewed frequently for each expatriate. At this point, any emphasis on act, agent, agency, scene, or purpose was noted, and key symbols and symbol clusters were also identified (Burke, 1945). Recurring symbols within narratives or across narratives within the sample were identified. For example, the term "adventure" seemed to be used frequently by some expatriates. The
events or descriptions that surrounded this term were noted. Individual meanings were developed using these clusters and meanings were compared across the sample for similarities and differences. For example, personal meanings for the term "adventure" were not consistent across the sample.

During this process of total immersion in the data, certain plots and subplots began to emerge. "A plot is formed from a combination of temporal succession and causality" (Martin, 1987, p. 81). Tacit themes or ideas that reflect significance for the individual are inherent within these plots. Signposts to a theme include changes in affect, repetition, and motivations of the characters. Once a theme was identified in a story, the characteristics of the theme were defined. These definitions became more refined as similar signposts would be identified in other stories across the sample.

Although it is important to recognize that systematic analysis and definition are helpful in identifying themes, ultimately the process of discovering themes is largely intuitive. Themes genuinely "emerge" from the data. As I would sit for hours and read and re-read the stories, there would be a moment of revelation. I would have the sense that this was what the story truly meant for the expatriate. As I tried to explore my
personal process of discovering themes, I would be unable to articulate the process. I could only seek to confirm the results by checking the theme against other events in the story and by seeking a fit between the theme and the explanation of specific behavior. My own insights into the process have only helped to reinforce my own belief that thematic analysis is extremely demanding on the abilities of the researcher to focus attention and reach into the minds of the storytellers.

There is always concern that the researcher will bring preconceived notions to the data and see what is expected to be there. To guard against this, I did a very cursory review of the expatriate literature prior to analysis. My reading was limited to broad surveys of expatriate failure rates and current concerns in international human resource management. Later, after I completed my analysis of themes, I returned to the literature and reviewed it in depth and was relieved to discover some of my themes articulated in the organizational literature. Although different terminology was used to describe the themes, other researchers had noted some of the themes as significant. Another approach to removing researcher bias was to limit my own personal evaluation of expatriates or themes. I conceived of each theme as useful to the expatriate to
understand and make the experience personally meaningful. However the individual chose to do that was simply viewed in this research as a method of cognitive survival. The process of meaning-making is neither inherently good nor bad, appropriate nor inappropriate, or effective nor ineffective during this research. Each expatriate was viewed as an individual doing the best that can be done within a complex situation.

To check the reliability of the descriptions of the themes, two coders were employed. Each coder was given written descriptions of the themes. The descriptions of the themes are the same descriptions included in Chapter 4 of this document. The coders did not receive actual examples of the themes but were allowed to ask questions for clarification. After a short briefing, the coders were given written descriptions of each theme and the actual transcriptions of the expatriate interviews. The transcriptions were divided so that one coder received 7 of the actual transcriptions and the other coder received 8 transcriptions. They were each instructed to indicate when a theme was present by writing the name of the theme in the margin of the transcript next to the relevant passage. The coding took between eight and twelve hours for each coder. The coder results were compared with my own coding and intercoder agreement calculated.
Agreement between Coder A and myself was .94. Agreement between Coder B and myself was .65. A possible explanation for the lower rating with Coder B and myself is a discrepancy with one particular theme - Illusion. When this theme is removed from the data, the agreement is .95. Coder A had no examples of the theme Illusion in her sample. It would appear that some problem exists in either the validity of the theme of illusion, or in my description of that theme, or in the coder's own understanding of the characteristics of the theme. I believe that it may be a combination of all three. Upon questioning Coder B, she revealed that she was unclear about the theme and had felt the most unsure about that theme during the coding. The theme itself may be obtuse. Illusion is often characterized by statements that appear paradoxical. To be disillusioned, the expatriate must have accepted the existence of illusion. This characteristic of the theme of illusion may make it more difficult to identify. It is also possible that this theme may not be valid or a sub-theme of escape from complexity. The conclusions regarding this theme must remain very tentative and require further research. But, in general, the results of the coding seem to support the reliability of the descriptions of the themes.

The discovery of images or metaphors employed a
different approach. For this part of the analysis, the entire narrative for each expatriate was examined. Any allegorical language was noted. Each narrative was analyzed for how the expatriate dealt with restraining forces within the narrative. Responses to the host culture and emphasis on act, scene, character, or motive were also documented. As a metaphor would begin to take shape in a specific narrative, the metaphor would be defined. As other narratives would show similar patterns, the metaphor was enlarged and refined.

Summary

This chapter has explained the specific procedures used in this study. The sample was described. Finally, the specific methods of analysis were articulated. Table 3.1 summarizes the steps followed in data collection and data analysis.
Table 3.1: Steps in Data Collection and Data Analysis

1. Narratives were collected using nondirective interviews.

2. Audiotapes of interviews were transcribed.

3. A chart of individual interpretations of contextual components was constructed using interview transcriptions for each expatriate. (Appendix C)

4. Audiotapes were reviewed and changes in rate, tone, inflection and volume were noted in the transcripts.

5. Stories were charted on time/evaluation dimensions. (Appendix D)

6. Each narrative was read repeatedly and any emphasis on act, agent, agency, scene, or purpose was noted. (pentadic analysis) (Appendix E)

7. Key symbols and symbolic clusters were identified in each transcript. (cluster analysis) (Appendix E)

8. Themes were identified using elements of individual contextual components, time/evaluation dimensions, pentadic analysis, and cluster analysis. These methods of analysis provided insight into the significance of the narratives for the expatriate and why the stories remained memorable.

9. Each narrative was analyzed again for allegorical language and individual reactions to restraining forces.

10. Metaphors were developed that illustrated individual frameworks for understanding the expatriate experience.
CHAPTER 4

Results

A content analysis of the expatriate manager narratives revealed a complex web of relationships, causal linkages, and personal values that are the substance of the subjective meaning of the experience for the individual working in an organization abroad. The web of relationships, causal linkages, and personal values are the themes and overarching metaphors that emerged from an analysis of the plots and subplots within the narratives and stories. This section will identify and illustrate these themes and overarching metaphors.

As a prelude to the discovery of themes and metaphors, specific elements of the objective context of the experience abroad must be identified as well as the subjective interpretation by each expatriate manager of this objective context. This analysis is essential for two reasons. Wallace (1987) describes the process of identifying theme as:

... fitting motifs together, evaluating characters, seeking causal connections... As applied to theme it suggests that the reader integrates story materials in two patterns simultaneously. One is prospective, involving action more than theme: given the trajectory of events up to this point, what is the likely outcome, and how will the enigmas be resolved? But like Janus, the reader is always looking backward as well as forward, actively restructuring the past in light of each new piece of information. Assumptions about causality lead to conjectures about the future; at
the same time, the facts of the present lead to the construction of new retrospective causal chains. This gathering together of the past produces the theme, and we engage in it most fully when the story has no future. We read events forward (the beginning will cause the end) and meaning backward (the end, once known, causes us to identify its beginning)."

The identification of the subjective context of the expatriate managerial assignment is critical to the identification of theme. To be able to construct significance backward in time (as suggested by Wallace as the process of discovering theme), the individual's specific interpreted context must be identified. Then possible themes can be checked against elements of a specific individual's subjective context to determine if the theme is relevant. So, one reason why the contextual components of the experience abroad are identified is methodological.

But a second reason for identifying the subjective contextual elements in the narratives has to do with increasing our understanding of the expatriate managerial experience in general. It appears that the subjective interpretations of contextual elements of the experience abroad interact in complex ways with the objective characteristics of the experience and the individual constructions of relationships, causality, and values (themes and metaphors) to determine specific outcomes.
This complex interrelationship indicates a mutual interdependence and, therefore, the identification of relevant contextual components may direct us in our future exploration of those variables outside of the individual affecting organizational outcomes.

This chapter will identify and describe;

1. the objective characteristics and subjective interpretations of contextual components relevant to the narratives and stories in this study

2. common themes in the expatriate narratives and stories

3. the images and metaphors that function within the expatriate managerial experience as individual sense making mechanisms

Contextual Components

Themes and metaphors emerge in the relational context of the individual abroad. Individual meaning is contextual. An individual expatriate manager cannot develop relevance or significance within a vacuum. Therefore, the individual develops a subjective meaning for the experience within a relational context. The subjective experience and the relational context mutually interact to modify and transform each other and shape the outward manifestations of the phenomenon - the assignment abroad. Wittgenstein (Hallett, 1967) emphasizes the importance of context in the creation of meaning. He
emphasizes that what is happening now has significance only in its surroundings. Referring to the grammar of meaning, Wittgenstein asserts that importance is contextual. Any characteristics of a person, environment, or situation that can vary from person to person, environment to environment, situation to situation become the grammar of the assignment abroad.

The task in the first part of this section is to describe the relational context in which the expatriate manager shapes a subjective interpretation. The contextual components are the characters and scenes within the stories and narratives. The relational context becomes the scaffold that provides access to the underlying meaning for the individual of the experience. If the context shapes subjective meaning, then I must immerse myself in the particular context of the individual to be able to discover the subjective meaning of experience revealed in the plots and subplots of the narratives.

This section first identifies the similarities among the expatriates' contexts. These similarities illustrate the general or objective context of the assignment abroad. Then the particular interpretations are identified to illustrate the subjective context of the assignment abroad. This framework is ultimately used to
assist in the identification of underlying themes and metaphors. At the conclusion of this chapter, tentative propositions will be presented regarding the interactive relationship between the relational context, themes, and metaphors.

The relational context as identified by the expatriates includes a cultural environment that is different to some degree from the expatriate manager's familiar cultural environment, a set of presuppositions about the foreign assignment held by the home office, a set of presuppositions about the assignment held by the host organization, the characteristics of the work performed by the expatriate, and a constellation of interpersonal contacts salient to the expatriate. First, the common elements of the experience will be identified and an objective context illustrated. The common elements of the experience are the components of the experience that are identified across the sample as relevant. They are the recurring characters and scenes. Second, the particular interpretations and variations of the individual expatriate managers will be presented. These variations will then be utilized to assist in the explication of themes and metaphors.
Common Elements and Characteristics

Cultural Environment

A foreign posting forces the individual manager to engage with elements of a heretofore unexperienced culture for, at some point, basic needs must be met. The cultural environment of the posting location provides a milieu in which the expatriate manager experiences being "out from" the natural or customary. This setting determines the conditions for experiencing disclosure and juxtaposition.

Aristotle described disclosure in the following manner; "Disclosure, as the term indicates, is a change from ignorance to knowledge . . . " (Aristotle, Poetics). Each expatriate interviewed described an experience of revelation at some point upon encountering the new setting. This revelation is the experience of becoming aware of something not previously known or realized and may or may not be accompanied by an intense emotional response. Revelation is a momentary, evanescent occurrence. That which has before been unknown is exposed. The individual's perspective is enlarged. Elements of this enlarged perspective are then juxtaposed against elements of the home culture (the familiar) and degrees of difference are implicitly or explicitly acknowledged by the expatriate manager.
Meryl Louis, in her article "Surprise and sense-making: What newcomers experience in entering unfamiliar organizational settings" (1980), acknowledges a similar experience for the individual who encounters a new organizational setting. Louis argues that the individual experiences change and contrast that then provokes individual sense-making. Louis' work provides some critical insights into the process of sense-making in a new environment. When previous "scripts" fail, the individual will retrospectively explain an experience using other's interpretations, local interpretation schemes, predispositions and purposes, and past experiences (p. 242).

Louis' work has implications for this research. The transitional experience for the expatriate manager has the potential to be even more disrupting than the transitional experience described in Louis' study. The expatriate is thrust into at least two unfamiliar settings; the job and the culture. According to Louis' assertions, the expatriate will engage in sense-making processes that ultimately shape how the individual will interpret specific events and the assignment in general.

In summary, the cultural environment provides a setting in which each expatriate acknowledges a sense of disclosure and juxtaposition. This awareness varies for
each individual, but in general, the experience is common to all expatriates interviewed and is supported by additional research in newcomer socialization. The cultural milieu is characterized generally by expatriates on degree of difference from the expatriate's home culture.

Home Organization Presuppositions

Each organization sending managers abroad develops a set of presuppositions regarding the purpose and scope of the foreign posting. Strategically and consistently planned by some organizations, these presuppositions may also be erratically and haphazardly evolving in other organizations. But whatever the state of development, the expatriate manager acknowledges, as part of the relevant context, home organization presuppositions. This sense is usually identified by the expatriates in this study as coming from interactions with individuals who represent the home organization to the expatriate manager. These individuals were often identified by the expatriates as a secretary, a personnel manager, and/or an immediate superior. Each expatriate manager maintained some contact while abroad with the home organization through which these presuppositions were communicated and against which the expatriate manager's personal expectations were compared. The home
organization presuppositions are characterized, in the experience of the expatriate manager, by the purpose, scope, and degree of consistency with expatriate expectations.

Host Organization Presuppositions

The host organization also develops a set of presuppositions regarding the purpose of a foreign manager in the organization. Expatriates describe becoming aware of these presuppositions primarily through interactions with co-workers and superiors and through unintended infractions by the expatriate of these presuppositions. The host organization presuppositions are also characterized by purpose, scope, and degree of consistency.

Characteristics of the Work Itself

The work abroad described by the expatriates tends to vary by degree across four dimensions. A specific job performed by the expatriate, as s/he describes it, will vary by degrees in ambiguity, proximity, similarity, and interdependence.

Job ambiguity for the expatriate is defined as the vagueness or uncertainty about the specific tasks needed to be performed to achieve a specific goal. Job ambiguity may also refer to the vagueness or the uncertainty of the goal to be achieved.
The work abroad also possesses degrees of proximity. The degree of proximity is that quality of the job that requires close physical contact with others who perform similar work. The job places the individual in proximity to others in space.

The similarity of the work performed abroad to the work performed by the expatriate manager in the home culture is also a part of the relevant context for the individual. The degree of similarity is the extent to which the job has tasks and role requirements that are the same as those performed in the home organization.

The degree of interdependence of the work itself is also a factor in the relevant context as identified by the expatriates in their narratives. The degree of interdependence is the extent to which the work requires the resources of others. This degree of interdependence acknowledges the need for the expatriate to incorporate the others in the execution of the job as well as the need for others to utilize the expatriate to accomplish their work. So the degree of interdependence is mutual within the context of the expatriate.

**Constellation of Interpersonal Relationships**

Within the narratives, several interpersonal relationships emerged as part of the relevant context. The narratives chronicle a pattern of vital connections
that give focus and depth to the individual experience abroad, and they appear to contribute significantly to the context in which the individual creates personal meaning.

The interpersonal relationships include the spouse and family, the home office, a referent group, a cultural representative, and co-workers. Although other characters moved in and out of the narratives, the ones listed above represent those which were most frequently referred to in the narratives. These relationships could be characterized most generally by the degree of connectedness and function. Degree of connectedness refers to the extent to which the expatriate is related to or affiliated with others. The function is the purpose of the relationship for the individual and refers to the needs of the expatriate that are met by the relationship.

**Summary**

In summary, the general context in which the individual interacts provides the scaffold on which to drape the individual interpretations of this context and to begin to formulate a specific context for each individual. This specific context is comprised of the individual interpretations of the common elements and characteristics that are consistent across narratives and
become the particular grammar in which to examine themes and overarching metaphors.

To illustrate the common context as described in this section, the following description of a generic assignment abroad is offered. As a composite, this description describes no one in particular but only a skeleton of the context in which the individual creates meaning.

The expatriate experiences the assignment abroad as such because s/he recognizes that there has been a going "out from" the customary or usual. This implies that the individual is at least aware of personal movement away. To describe the experience as an "adventure" is to suggest that the assignment abroad is, at its most basic level, a coming out. The Latin root of the word means "to come to." Attaching no affect to the word at this level, it simply means that the individual has traveled to some location and acknowledged this movement. To recognize this movement, the expatriates are aware that where they are is different from where they have been.

The common characteristic of a home organization emerges out of the awareness that a part of the organization remains behind. The individual is aware that organizational action is purposive, and because the individual expatriate is in another culture, this
awareness implies some intentionality on the part of the organization toward the individual expatriate manager. This awareness becomes the home organization presuppositions.

A similar awareness is experienced by the individual that s/he is now attached in some way to another organization within the other culture. This attachment is, at its most basic, a connection between the individual and the organization. This awareness becomes the host organization presuppositions.

Within this cultural milieu and these organizational frameworks, the individual expatriate experiences certain activities described as work. Work is purposeful activity. Each expatriate manager has some sense of purposeful activity while abroad. This purposeful activity brings the individual into spatial and psychological proximity to others in the execution of purposeful activity.

While in another culture and encompassed by organizational frameworks and engaged in purposeful activity, the expatriate manager establishes and orders human relationships. The individual becomes connected to others. Each individual develops a web of complex interrelationships and interdependencies.

Although these common characteristics have been
carefully delineated for explanation, this description distorts the true nature of the relationships between the elements. Language and the process of telling requires linear description. But these elements are interactive not sequential. They co-mingle in the mind of the expatriate to produce the individual interpretations explained in the next section. These interpretations are shaped by a set of individual characteristics that are unique to each expatriate manager.

At the core of the expatriate managerial experience abroad is the individual. Each individual possesses specific characteristics which shape and form his/her personal meaning for the experience. These characteristics function as individual interpretive processes and include knowledge, attitudes, goals, and expectations.

The knowledge referred to by the expatriates in the narratives which appear to affect the individual experience most directly is knowledge about place and scene. For example, the expatriates may have information concerning the demographics of the country to which they are being assigned. This information includes socioeconomic data, education data, customs, etc. Information associated with the local context of the expatriate is also relevant. This might include
the degree of consistency among others about the host cu.
ingly influence the interpretation of the experien-
epic episodes within that
described as a dominant affect. Interpret his/her experience as positive or the negative. If the experience is assessed (humor, affection If the dominant affect is ym, suspicion, and fear.
evaluations of events. For some, the thing wonderful and exciting; for discouraging and these affects are, but individuals in strenth in their
identified as memorable

dominant affects are
neighborhood demographics, availability of health care, local customs, host organization culture, etc. The amount of knowledge and the degree of consistency of that knowledge among relevant others about the host culture and the work culture strongly influence the individual expatriate manager's interpretation of the experience abroad as whole and specific episodes within that experience.

Attitudes are best described as a dominant affect. Each expatriate tends to interpret his/her experiences with an emphasis on the positive or the negative. If the dominant affect is positive, the experience is characterized by positive assessments (humor, affection, wonder) of specific events. If the dominant affect is negative, emotions such as anger, suspicion, and fear characterize the individual's evaluations of events. For instance, several expatriates reported the experience of being lost or disoriented at some point. For some, the experience of being lost was wonderful and exciting; for others, the same experience was discouraging and frustrating. It is not clear if these affects are consistent across all life events, but individuals in this study do tend to remain consistent in their attitudes across events that are identified as memorable during the experience abroad. These dominant affects are
illustrated in the level of self esteem expressed by the expatriate, attributed motives of other actors, and the personal assessment of the expatriate regarding the general outcomes of specific events.

The expatriate manager's goals are also identified as contributing to individual interpretations. The experience abroad may be described by the expatriate as an end in itself (an instrumental event). But others in this study describe the posting abroad as an opportunity to learn and develop in undirected ways (an expressive event). Questioned about why they went abroad, some expatriates responded that they were there to do a job while others remarked that they thought the experience would be a good opportunity to develop and grow as an individual.

Finally, the expatriate's expectations regarding the assignment abroad and the congruity between these expectations among other actors in the experience abroad affect the individual's meaning. The expatriate enters into the foreign assignment with certain expectations that may or may not be fully articulated. These expectations may remain at the tacit level. But at whatever level, these expectations parallel or diverge from the expectations of others within the expatriate's environment. These expectations may also evolve and be
transformed as the assignment abroad unfolds. One expatriate described the expectation of doing research in shale oil retrieval. Upon arrival abroad, the research was suspended and the expatriate was made a liaison between management and a research group. Another expatriate was sent abroad, as he understood, to manage a new plant. Upon arrival, the plant was being managed by a local employee. The expatriate was reassigned by the local general manager to a technical advisor role.

Each of these individual characteristics interact with the contextual components of the assignment abroad to form unique individual interpretations of the context. These individual interpretations then become the specific context in which themes and metaphors emerge. These themes and metaphors provide the unifying linkages between the disparate elements of the individual expatriate's context. These themes and metaphors provide a framework for ordering relationships, determining causality, and valuing. Although the process described appears to be linear, this is not a true representation of the relationship between the contextual elements and individual interpretations. The nature of this relationship will be more fully explained at the conclusion of the discussion of individual interpretations of contextual components. The next
section illustrates the context as interpreted by each expatriate. Unique characteristics of each element are identified.

**Individual Interpretations of Contextual Components**

**Cultural Environment**

Each expatriate interviewed described an experience of revelation at some point upon encountering another culture. This revelation is the experience of becoming aware of something not previously known or realized and may or may not be accompanied by an intense emotional response. Specific examples of individual interpretations of disclosure follow.

... but I would say it (the assignment abroad) really does open a perspective.

... I think I came of age in Belgium. It was the first time I'd ever been to Europe, so for me it was a real eye opening experience ... You know, getting over to Europe and seeing some of the art and getting exposed to, you know, what's really out there. So I don't think a day went by I didn't really feel like I'd learned something or saw something different.

I think it (the assignment abroad) makes you get a bigger perspective on the world. Perspective that the world doesn't revolve around the United States and English-speaking people and the American culture ...

These quotes indicate that for the individual revelation can be a momentary, evanescent experience, or a continuous sequence of exposures. But the outcome is that the individual's perspective is enlarged by their
own estimation. Elements of this enlarged perspective are then juxtaposed against elements of the home culture (the familiar) and degrees of difference are acknowledged by the expatriate manager. The following examples illustrate.

I can remember sitting there waiting for her (his wife) and this big, long limousine pulling up and the guy getting out and my wife getting out of the car, (laughter) oh boy, this is different than living back home.

My wife and I had the same feeling at the same time. Gee, you know it is a different culture. Maybe it's not greatly different, you know, maybe (pause) and I suppose that's relevant to where you've been and what you've done, but we've never been out of the country other than just across the border to Canada or something like that, so (pause) I think that was part of the awareness. Hey we're in someplace different. Evidently, it's different enough that you don't walk across the street to Denny's and get something to eat.

I guess one of the things to me that was really memorable is the difference in the culture of these street carnivals they have. They're giant, drunken brawls. They're street brawls. Ah, it's very different from the United States.

One does tend to question things a lot more than one did before because when you leave the States, young and naive, you know black and white, right and wrong, good guys and bad guys, and who was good and who eats the best, who's the richest and how things should be done and so forth, and then you go to another country and everything is different.

As these quotes indicate, the expatriate may interpret the other culture as being minimally different from the familiar to a complete contrast. The degree of difference is illustrated in individual responses.
Home Organization Presuppositions

Presuppositions, as described in the expatriate narratives, range from broad, developmental objectives to narrowly defined, instrumental objectives.

Basically, the company was trying to promote some kind of an exchange before the takeover.

We have a policy that Americans tend to be the expatriate managers of (company's name) operations abroad . . . the British culture is very similar to American culture, but it also has its own idiosyncrasies; one of which seems to be some reticence on the part of British management to take direction from British executives . . . they're sent there as a broadly learning type experience. It's not for, in my opinion, technical expertise. It's more of an exposure to a different part of the company, to a different part of the world and a contact building thing.

I was an auditor. I was a senior accountant . . . it's relatively low level auditor. I was working with companies that were subsidiaries of U.S. or British companies.

I was a compounder, and I was doing the same thing I do here but at our international tech center.

The path to the top of the corporation through (company's name) normally is through International . . . The company felt that in order for me to round out my experience and become a good manager, I needed to move into operations so that the assignment in Argentina was to help them out with some engineering problems, but then at the same time do a training program in operations.

I was assigned to go abroad . . . I was there in charge of our European operations . . . It was a small organization . . . so it was somewhat technical in nature in that I was doing a lot of troubleshooting, so to speak.

The firm has an international service program . . . it's very selective . . . It's really just to get
people, to give people the experience of living overseas for anywhere from 18 to 30 months.

Supposedly there was a technical need that couldn't be filled by anyone in the company there (London) . . . at the time no one was doing anything in my line of work, so I ended up there for that reason. It wasn't really spelled out.

The expatriates interviewed identified individuals within the home organization who contributed to the expatriates' interpretations. These individuals included a secretary, a personnel administrator, and/or an immediate superior at the home office. These individuals embodied the home organization for the expatriate.

The secretary, as described by the expatriates, most frequently provided basic services such as mail forwarding, travel arrangements and tax information. This individual is often described as vital for informal information about what is going on at the home office. For some, this link to the home office is described as an umbilical cord without which they could not have survived.

The personnel manager is identified less frequently by the expatriates interviewed as a source of home office presuppositions about the assignment. When identified, this individual is usually perceived as responsible for salary adjustments in countries where inflation is constantly fluctuating. Often described by expatriates
as out of touch, the personnel manager is viewed as a source of frustration and conflict.

Finally the expatriates identified an immediate superior who is perceived as having control over the genesis, development, and outcome of the assignment. This individual appears to contribute to expatriate interpretations of presuppositions through the frequency and duration of contact with the expatriate as well as actual content of messages.

**Host Organization Presuppositions**

For some expatriates the host organization's presuppositions are described as the parameters of the job, the embodiment of a significantly different national culture, a set of personal constraints purposefully imposed on the expatriate, and/or a series of challenges to be energetically overcome through strategic moves engineered by the expatriate. The following examples illustrate individual interpretations of host organization presuppositions.

*Everybody knows that you're there for a while and then you're going to be gone. And I think there's an invisible barrier that everybody puts up probably to protect themselves from getting real close to people and then they're gone, probably never to see them again, because everybody knows that.*

*I went there to work under the supervision of the partner in charge of the office, and to perform legal services out of a Brussel's base for American clients whose activities were in Western Europe, generally, and also to assist the firm in*
representing a substantial European client base.

Well, they said they wanted me to learn the language better. The project had already been started and instead of me coming in and trying to take over from the top, they wanted me to learn the language better so that I could deal with the contractors and the local people better rather than, you know, try to do it in English. It would be a problem. Plus, the man who was in charge of the project, I don't feel, really wanted to give it up. And the boss down there, the managing director down there, decided that it probably would be better if he didn't try to take this away from him and give it to an American, because there would be less cooperation.

I went there with the impression that I was going to expand in my abilities as a technical person and the job that I had was basically clerical. I hated it and I left.

It's (British organizational structure) much more vertical in that you work through the next guy and if he works and all that information works its way down; very structured. There aren't many grey areas in a sense. It's a very structured situation. If you try to break that structure down a little bit, they're not real happy.

We reduced the expenses and the employment immediately by 10%. Of course we had to fire some employees and leave 'em go which was very painful and very difficult in everywhere but particularly so in Belgium. Because it's something that's just not done in their culture. You know, you just don't hire and fire at will with the company. That is not the way it works in Europe. And ah, but at the same time we doubled the sales.

Expatriates become aware of host organization presuppositions principally through interactions with co-workers and superiors and through infractions by the expatriate of these presuppositions. None of the expatriates referred to any formal organizational
mechanisms for communicating these presuppositions. It is entirely possible that these formal mechanisms do exist but that the informal mechanisms remain more memorable to the expatriate.

The presuppositions about the assignment by the host organization as interpreted by the expatriate contribute important contextual elements to our understanding of the underlying meaning for the individual experience abroad.

Characteristics of the Work Itself

Characteristics of the work itself are interpreted by each individual expatriate. Individual interpretations of the nature of the work while abroad contribute to a broader understanding of the personal meaning of salient narratives.

The individual manager determines, based on specific information, the degree of ambiguity of the work that they do while abroad. For some expatriates, the greater the degree of ambiguity they perceive in the work abroad, the greater the degree of complexity in the experience for the individual. If the degree of complexity is perceived as great, the expatriate may respond by intensifying the personal issues that surround complexity and use the resulting energy as an impetus to "figure things out" or the expatriate may deny the ambiguity through reductionist thinking. For example,
some expatriates, experiencing ambiguity in the job, seek to understand the cultural forces within the host culture and his/her own psychology in that culture to make enough sense out of the work setting and to be able to act. Other expatriates, experiencing ambiguity in the work, simplify by over-generalizing, stereotyping, and scapegoating to be able to act.

Those expatriates who perceive ambiguity in the work to a lesser degree, may escape to the work as an island in a sea of ambiguity which exists in the host culture "outside" the work.

Each expatriate perceives the work in a spatial context. The individual manager views the work as placing him/her in proximity to others. This proximity may be interpreted by the individual as defining the relationship. The expatriate may view those in proximity as competitors or colleagues. The degree of proximity is interpreted by the expatriate in terms of power relationships.

The degree of interdependence of the work is the final characteristic of the work itself that appears to be part of the relevant context for understanding the narratives from the expatriate's viewpoint. For some expatriates there is a perceived high degree of mutual interdependence in the work abroad. For instance, one
expatriate stated, "... they accepted me as being part of the Argentine team; they were willing to come to me; they were willing to discuss things with me. I gave them some expertise that they didn't previously have." It appears that the expatriate considers him/herself as a resource when s/he is no longer considered stereotypic by co-workers by his/her own assessment. The expatriate feels individuated from other "typical American managers."

Those expatriates who perceive a low degree of interdependence experience limited individuation. These individuals may rarely feel sought out by co-workers, superiors, or subordinates. The expatriate perceives him/herself to be ancillary to the real work of the host organization and trapped in a generalized characterization or caricature of an American manager.

**Constellation of Interpersonal Relationships**

Within the context of possible relationships to be developed abroad the individual expatriate identifies those who have particular significance for his/her own sense-making. These relationships determine the salient connections for the individual. Each relationship will also take on a relevance for the individual in terms of performing some function. The following descriptions develop some specific interpretations of relationships
identified by the expatriates.

The expatriate to spouse and family relationship is described by the expatriates as representing a means of approach for the expatriate. Because the family must have certain needs met within the host culture, such as sustenance, education and medical care, they become for the expatriate a viaduct through which the expatriate may enter the culture or a specific group within the context of the assignment abroad. The following quotes illustrate this function.

... after the first four or five months, we got to be more familiar with the surroundings we were in. Basically through the children and their involvement in the American school, we met other parents.

... first of all we had to find a clinic because my wife was pregnant ... and anyway the retired schoolmaster who was a neighbor knew everyone in town and got her in the clinic that was closest.

The expatriate/spouse and family relationship were also described as witnessing. That is, the family and spouse are observers of the expatriate manager's actions within an unfamiliar environment. When expatriates refer to these episodes in their narratives that illustrate this characteristic of witnessing, they usually do so in reference to an unsuccessful attempt by the expatriate to "figure out" specific cultural elements. Perhaps it is the sense of failure that highlights this particular function of the expatriate/spouse and family
relationship.

As a matter of fact, I knew I was lost; my wife wasn't lost, she had known where we had come from.

I was never not tense driving over there. My wife was fine, but I never was.

The expatriate/spouse and family relationship is also marked in the expatriate descriptions by the displacement of developmental goals on to the children. Expatriates describe their admiration for their children for developing skills and confidence abroad. The expatriate experience is generally described as a wonderful experience for the children.

And I was really impressed that he (expatriate's son) was in a country where he did not know the language, and he was quite confident . . . I thought, you know, they have gotten something out of this experience. When they feel comfortable traveling in a country where they don't speak the language and don't feel intimidated by it.

The expatriate to home office relationship is described as a source of personal validation, that is, a communicated degree of importance. When the expatriates describe this function, the expatriate explains the relationship in terms of implied usefulness of the expatriate to the home office.

It (home office) wasn't much of a relationship really. At that stage I was a relatively low level . . . I was 23 years old when I was there so it wasn't exactly like they flew me over on the Concorde for managers' meetings or anything.

Out of sight, out of mind . . . in my view, they should have maintained contact for a lot of reasons.
I mean the business reasons just make sense. Why is somebody over there? I mean there's a reason they're paying for it.

Other expatriates describe the expatriate/home office relationship as a bridge to the familiar. This relationship is characterized by the home office regularly sending tangible artifacts of the expatriate's home culture to the expatriate abroad.

Minimum, the bare minimum. New York would send out my mail, you know, publications and would send out all my tax information.

It (the relationship) was excellent. We had a contact. I've never seen anyone in my life so organized and so able to handle it. Anything you wanted, she could handle it. . . . You know, you call and ask about, I need to get this form, and she says yeah I sent it in the mail yesterday. That kind of thing.

For others, the expatriate/home office relationship is perceived by the expatriate as a relationship in which control is arbitrated. The control aspect of the relationship is depicted as the home office granting freedom and independence to the individual abroad or, conversely, as withholding freedom and independence.

There wasn't a direct relationship with the home office back here in the States. It was a dotted line . . . in the running of the business, they were not really involved in that.

My superior at the home office said we're here to help you, whatever you need. If there are any questions in your mind, try to handle them locally . . . Basically, it's your store; you run your store and I'll run mine.

I think I was very remote and as the managing
director pretty much had all the authority to operate the business in Europe within the framework of a large organization that I needed.

I would say that the relationship was not one with which I was entirely satisfied by any stretch of the imagination . . . they didn't understand what we were trying to do, and they weren't very supportive of what we were trying to do.

They (American management) had very strong feelings of what, I think the reason I went there was different than why other people went there . . . management thought it would help if I would learn how these other people march in line and all this . . . I tried to change that through peaceful means, and when I couldn't, I left.

Expatriate managers identify a group or groups to which they relate most closely while abroad. Individuals in these groups may be co-workers, other Americans, other expatriates, family, or members of the host culture. The expatriate to referent group relationship is one for some expatriates in which familiar rituals are shared.

On the one hand, it seemed like the Americans that you associated with . . . that was the time to let your hair down . . . you know, we'd have our Christmas dinner or Thanksgiving dinner with the Americans . . . and we could have, maybe, a Fourth of July part with the Americans.

The expatriate/referent group relationship is also one in which the expatriate perceives a sense of comfort, a safe haven, and an escape from the complexity of an unfamiliar environment. In this relationship the expatriate describes a "letting down." The individual does not fear breaking the rules nor does s/he feel the
need for a facade to conform to the expectations of the host culture. Within this relationship, expatriates feel free to complain about their problems because members of the referent group are perceived as having common experiences.

. . . we found ourselves drifting right back to the American group because there were a lot of people you could share some of your experiences with.

I think a reference group would have probably been the Americans. I mean that's who I had the most in common with. That's who I could talk to about sports and when I'm really bitching about how things are in South Africa . . . they related to the problems.

The expatriate/referent group is also characterized in the expatriate manager's narratives as a source of knowledge. This relationship is described as learning from the members of the referent group. The expatriate is the learner and the members of the referent group become the teachers. The expatriate opens him/herself up to a mysterious, intriguing world that is represented by the referent group.

But then the South African group seemed to be social but also that it was an opportunity to expand your horizons . . . we could learn from them.

I found them (Russian expatriates living in Paris) fascinating and listening to their little stories. I was like a child with an adult. I had nothing to bring to them so much as someone to listen to their stories.

The expatriate/referent group relationship is also
represented by the expatriates as a place to lose the self. That is, this particular characterization of the relationship implies a sense of getting lost in the group. In the following instances the referent group is perceived by the expatriates as a group in which the individual can get lost in a crowd mentality.

A lot of people I associated with on a social basis were British or some Luxembourgers and a few Americans . . . It's more of a group in tally. It's like a high school band.

So, this environment or group of people became bonded to each other. Matter of fact, they call it The Fraternity. We made our own rules.

Lastly the expatriate/referent group relationship is occasionally portrayed as highly competitive. Seemingly, the expatriate sets the referent group up as a standard for measuring the expatriate's own degree of competence. This characterization of the relationship is marked by a degree of rivalry.

. . . at work there was definitely a group with which I'd associate . . . they were my co-workers who just happened to be in the vicinity of my work station . . . There was always, not with all the people there, but there was always a sense of competition. I hope not generated by me; I know in the end it was partly continued by me, but at that point it had become fun.

The expatriate also describes an expatriate/cultural liaison relationship. The cultural representative acts as a bridge to whatever aspect of the experience the expatriate manager determines to be vital to him/her.
The expatriate/cultural representative relationship is described by some expatriates as parental. The cultural bridge is usually older than the expatriate and performs what are perceived by the expatriate as caretaking services.

. . . and this international partner . . . we called him Uncle Roy, because that was about the age difference between him and us at the time, played a key role in linking us to our U.S. firm and our other U.S. environment . . . we were in our twenties and he was a bachelor in his 40's, and he was always chatty and interested in what the wives were up to and the children, and he would bring gifts for the children. So that was a bit of a family-type relationship.

The expatriate/cultural representative relationship is also characterized by the expatriates as a conduit through which things got done. When the expatriate manager characterizes the relationship in this way, the expatriate marvels at the ability of the representative to make things happen. The expatriate does not seem to seek to understand the source of the ability but is content to be amazed at its existence. In this relationship, it is interesting to note that the expatriate does not describe the representative as a means of getting more familiar with that which the expatriate does not understand. The representative is seen as a way to not have to deal directly with an unfamiliar situation.
The man that I promoted to take my place when I left the industrial engineering manager's job in England I picked mainly because his favorite phrase was, "Leave it with me, I'll take care of it." And he did. And then after you left him with it you could depend on him. The other managers didn't have anywhere near the aggressive attitude that he had. He got things done; he was a rare individual.

**Summary**

This section has identified and described the objective and subjective elements which comprise the context for expatriate managers' experiences. These contextual components are the cultural environment of the posting abroad, home office presuppositions, host organization presuppositions, characteristics of the work itself, and a constellation of interpersonal relationships.

These components were identified through an analysis of character and scene in each narrative and story. Characters are the actors or players portrayed in the narratives. Scene is the description of place and answers the question - where did the events occur? These components were analyzed for common characteristics across narratives and qualities that differentiate specific characters and scenes from each other.

The contextual components identified in this study are consistent with those identified by Meryl Louis (1980) as "inputs to sense making." Louis identified
past experiences with similar situations, personal
characteristics (predispositions to attribute causality
to self and purposes), personal interpretation schemes,
and others' interpretations (p. 241). The analysis of
narratives revealed more specifically the other
interpretations suggested by Louis that contributed to
the subjective experience of the individual (i.e. home
and host organization presuppositions, the constellation
of interpersonal relationships), but this analysis also
suggested that the nature of the work itself contributed
to the subjective experience. This analysis also
specified those individual characteristics of knowledge,
attitudes, goals, and expectations as central to
individual interpretations.

The relationship between objective context and
subjective context is illustrated in Figure 4.1. This
figure depicts the complex interrelationships between the
elements of the experience abroad. The figure represents
the reciprocal interdependence of the subjective
interpretation of the contextual components and the
contextual elements within the objective environment
surrounding the expatriate manager abroad. The
perspective in this study assumes a continuous and
multidirectional interaction between the individual's
interpretive processes and the situation.
Figure 4.1: The reciprocal interdependence of the subjective interpretation of contextual components by the individual expatriate manager and the situation.

Subjective and Objective Contextual Components

Situation (Objective Context)
- cultural environment
- home organization presuppositions
- host organization presuppositions
- the work itself
- interpersonal relationships

refer to interactions and influence relationships

Individual's Interpretations (Subjective Context)

knowledge

- cultural environment
- home organization presuppositions
- host organization presuppositions
- the work itself
- interpersonal relationships

attitudes

goals

expectations
Within this interactional context, the individual expatriate manager reveals patterns that represent the subjective meaning of a series of connected events within an episode that occurred while the individual was abroad. These patterns represent a web of relationships, causal linkages, and personal values that are the substance of the subjective meaning of the experience for the individual working for an organization abroad. These patterns are the themes as described in literary or narrative analysis. These themes reflect the tacit meaning of the experience for the individual and are identified and described in the next section.

**Narrative Themes**

The expatriate narratives portray several themes that illustrate the experience from the expatriate manager's subjective perspective during the assignment abroad. Themes are defined as ideas or subjects that recur within a narrative or across narratives and reflect the underlying meaning of the experience for the individual. Descriptive of both overt physical action and an inner condition, narrative themes are abstract concepts that illustrate individual sense-making and unify individual action. Themes are the theoretical constructs that comprise subjective reality. These themes emerge out of the complex milieu of
interdependencies and interrelationships described in the previous section. These themes reveal the often poignant side of the human experience of being abroad. Human vulnerability and sentiment are exposed. This section will identify and illustrate the themes unearthed in the expatriates' narratives through an analysis of plots and subplots.

Failed Dependence

Failed Dependence occurs when the expatriate acknowledges that the reality on which the individual has chosen to rely is no longer adequate to explain what is now being encountered. Existing frames of reference don't work.

Failed dependence is defined as the individual experience of a loss or breakdown of sense making mechanisms. This theme is recognizable in episodes of being lost or disoriented. The expatriate describes the sensation of being out of control. Emphasis on and defense of the familiar are also characteristic of the theme of failed dependence. For instance, the expatriate may spend time defending the American way in an attempt to gain control—to assert a familiar framework over an unfamiliar framework. It is possible that the inverse of failed dependence—reclaimed potency—could also be indicative of the theme. This is only an hypothesis, but
perhaps the expatriate, experiencing failed dependence would feel the need to assert his/her personal power. Episodes in which this occurred would remain memorable. Therefore, the expatriate may include references to experiences in which the expatriate reclaims personal potency. These episodes could include experiences in which the expatriate was able to perform better than expected or was able to put others off balance.

Example #1 - Failed dependence

John arrives in London with his wife and checks into a hotel. After five to six hours of sleep, they awake and decide to get something to eat. John and his wife walk outside the hotel and John experiences a sense of total disorientation. He attempts to find north but cannot get his bearings. John and his wife begin to wander down a nearby street and look in establishments that appear to be eating places. None of these establishments appear to be serving dinner yet. At some point in his wandering, John realizes that he is lost. He does not recognize any of his surroundings and cannot identify any orienting features of his environment. John's wife eventually recalls the way that they have come and is able to retrace their steps back to the hotel. John's existing frames of reference don't work to help him explain his environment. John's sense of
direction fails him and his rational ability to figure out his environment also fails. John is no longer sure on what if anything he can depend.

Example #2 - Failed dependence

John is invited to participate in a game of cricket at a sporting event arranged by John's co-workers to honor John and his family. John is personally delighted by his ability to play cricket. He is able to perform better than he perceives others expect of him. He also describes driving a boat later in the same day and his sense of delight at being able to maneuver the craft to the surprise of those around him. I would claim that John's narrative reflects failed dependence because the significance of the events of that day lie in John's sense of regaining control. To regain control, John must have felt out of control initially for the experience to have such significance for John. John must experience failed dependence to have reclaimed potency emerge as an important issue.

The experience of failed dependence is recognized in the literature. Meryl Louis (1980) described the process of newcomer socialization as characterized by "disorientation, foreignness, and a kind of sensory overload." Louis notes that in this situation normal "scripts" fail, and the individual must engage in
"retrospective explanations" that involve sense-making. Scheutz (1944) described the stranger, in a state of transition, perceives the cultural patterns of the "approached group" as a "labyrinth in which he has lost all sense of his bearings." Both of these writers recognize the experience of failed dependence as part of the transitional experience. For Louis, the experience is part of the transitional process into an organization. For Scheutz, the experience occurs in a cross-cultural setting. The expatriate while abroad experiences both of these transitions and this may explain why the theme of failed dependence is so pervasive in the subjective experience of some of the subjects in this study.

Several of the narratives contained references to momentary experiences of failed dependence, but for an expatriate narrative to be classified as characterized by failed dependence, the theme must be pervasive throughout the individual's experience abroad.

**Escape from Complexity**

Escape from complexity refers to experiences in which the expatriate simplifies complex realities as a response to an inability to understand or disinterest in the abstract meanings of others. Complexity is also characterized by the expatriate experiencing intense, conflicting emotions.
The theme of escape from complexity is recognized by expatriate references to simple explanations of complex phenomena (i.e. "I was just doing a job." "I am no different over there than I am here." "London is just like New York or Miami.") Another clue to escape from complexity is a description of a period of emotional calmness embedded between or after periods of intense emotional upheaval.

In the narratives that are representative of this theme, the expatriates focus on situations in which the need to "figure things out" is absent. The expatriates describe a letting down of the emotions. Whether the scene is a vacation, dinner party, or drinking bout, the individual simply accepts the reality at face value and wallows in the simplicity. This experience seems to renew the expatriate.

Example #1 - Escape from complexity

Tom, his wife, and two children take their first vacation after arriving in England. They decide to drive out to Devon and Cornwall. Because Tom is still uncertain about driving, the trip out of London is tension filled. Finally, they begin to get away from the city traffic, and Tom feels himself beginning to relax. When they arrive in Cornwall, Tom describes their accommodations as not modern, and he also notes that the
people are "nice." There is little except the breakfast that Tom notes as out of the ordinary. It is the off season, so Tom and his family spend their time roaming the deserted beaches. Tom remarks that the experience is "nice" overall.

Upon further analysis of this narrative, it is at first unclear why Tom describes the experience as pleasant. Tom is not impressed with the beaches personally because he says he has seen beaches before. At first reading, the experience does not appear to be extraordinary in any way. In fact, at first glance, the narrative may appear not to have any underlying meaning. But upon closer examination, simplicity becomes the theme. To Tom, who has been under assault by the British culture and unable to figure experiences out to his satisfaction, this vacation is a needed respite. The trip away from London is a safe haven where the demands to make sense of the experience are minimal. Tom can vacation without a complete understanding of the British perspective, and his personal place in the British culture. Vacationing is something Tom knows; he can relax.

Example #2 - Escape from complexity

Jim is in Ireland managing a production facility. All of the episodes Jim relates about his experience
abroad are about other members of his family. He speaks of his oldest son's self-confidence and self-reliance that has developed through his son's experiences abroad. He speaks admiringly of his wife's ability to manage the visit from the home office of three vice presidents and their wives shortly after Jim and his family move to Ireland. Jim describes himself while abroad as no different than when he is in this country - a family man simply doing his job. Jim describes his own relationship with his job in Ireland as frustrating. He says that the country is "a great place to live and a heck of a place to work." To Jim, his family and his role in that family lack complications. In his family, Jim knows his role and affirms his ability to contribute to other's success. After all, Jim perceives himself as providing his family with this opportunity to develop and grow as individuals. Jim's narrative indicates that he reduces the complexity of his experience abroad by locating his meaningful episodes in the context of his family.

Gamboling

Frolicking and whimsy are central themes in some of the expatriate narratives. Gamboling refers to playfulness but also to breaking the rules. There is a sense of delight in doing what is unacceptable in the home culture or home organization. The expatriates'
descriptions of this theme create an image of the assignment abroad as a chance to run away from home; to escape from parental supervision. The expatriate engages in behavior that is acceptable in the host culture but is unacceptable "at home." The expatriate narrative conveys a sense of comradeship and fellowship among the expatriate and the other participants in the gamboling. The expatriates may describe themselves as rebels and take pride in their challenge to established patterns of behavior. The expatriate's exploits have distinctly adolescent overtones.

Direct or indirect references to getting away from parental control are indicative of episodes of gamboling. Participation in risky activities just for the adventure is also gamboling. Motivated by the immediate pleasure, expatriates may engage in explanations of the gamboling that attribute the behavior to extreme youth or following the less restrictive customs of the host culture.

Example #1 - Gamboling

Steve is assigned to Luxembourg as a staff engineer. Steve and his friends attend the street festivals in Luxembourg. He describes the carnivals as "giant, drunken brawls." He recalls observing a man about 60 years old and his wife and a relative or friend who have just gotten off a carnival ride. Having had too much to
drink, they can't stand up. They begin falling down and pulling each other down and laughing uproariously. Steve is amused by the sight. He states,

You know, you don't expect to see your parents out drinking beer and going on amusement rides. These people were having fun, and there were no inhibitions to having their fun.

Steve admires this lack of inhibition, and he models this behavior in his own experiences while abroad. He enjoys the Hedonistic pleasures of the experience abroad and letting loose.

Example #2 - Gamboling

Ann describes the experience abroad as a "two to three year party." She talks about becoming very social within the international community. She attends the festivals and the continuous rounds of parties in the international community. She describes herself as being somewhat extreme with the social side of the experience abroad, especially in the beginning of the experience. She explains that her work is interesting, but what she does outside of work is more meaningful. Each of her narratives refers to escapades outside of work (i.e. Paris on a lark, street festivals, impromptu dinner parties). To Ann, the common thread of her experience abroad is play. She comments that many of her behaviors abroad would not be accepted at home. Ann comments that
people are much "looser" abroad.

Nascence

Nascence refers to a coming into being or a beginning to develop or form. Narratives conveying this theme are filled with the expatriate's descriptions of wonder. The individual is entranced by the host culture and finds the people and the events seductive and exotic. The expatriate opens him/herself to the host culture and embraces the experience. Wanting to be shaped or formed by the experience abroad, the expatriate learns from the culture as a young child would learn at the knee of a parent or grandparent.

This sense of discovery creates nascent experiences for the expatriate. These experiences, when shared with members of the host culture, create a special bonding. The expatriate describes a connection to the host culture because it has participated in the awakening of the expatriate's senses--a rebirth. These nascent experiences are not described in the narratives as ever occurring in the work environment abroad. Perhaps it is the familiar nature of work universally that precludes nascence. But the narratives did not reveal a special attachment to the work or organization that was described between the expatriate and the native culture.

Narratives that focus on firsts (first born, first
time at the market, first exposures) are indicative of nascence. A process of discovery that includes the experience of awe implies nascence. Engaging the expatriate’s primitive being, graphic descriptions of sights, sounds, and smells and an accompanying feeling of wonder are also illustrative of this theme.

Example #1 - Nascence

Phil and his wife are shopping in an outside market in Paris. Phil graphically describes the sights and sounds of the marketplace. He remarks that he has never seen fresh produce and fish brought directly to market. He describes "a fishwoman chopping the head off a fish and the scales flying and wrapping it in loose paper." Phil comments at this point in the narrative he realizes how "exotic" the experience is. Having grown up in the Midwest, Phil marvels at the exotic fishes, snails, and other culinary delights of Paris. To Phil, the experience abroad is characterized by his own innocence. He portrays himself as a child listening with fascination to the stories of an exotic place. Phil says,

I found them (the Parisians) fascinating and I would listen to their little stories. I was like a child with the adult. I had nothing to bring to them except someone to listen to their stories.

Institutionalized Marginality

Marginality in this instance does not refer to a
physical placement of the individual on the perimeter of the organization. Nor does marginality refer to a particular organizational role that performs boundary spanning tasks. Instead, marginality, as it is described in the narratives, is a frame of mind characterized by the sense of being between cultures. The marginal expatriate manager views him/herself as uncommon when compared to domestic managers or other expatriates who do not share the marginal expatriate's unique perspective.

The individuals, through prolonged exposure to conflicting cultural assumptions, begin to view themselves as different from others and may conceive of their role as that of interpreter for the more parochial. The marginal expatriate views him/herself as different and unique. Institutionalized marginality refers to the degree to which the marginal individual feels enclosed and constrained in the formal organization. Institutionalized marginality also refers to the degree to which the individual's unique perspective is utilized in shaping organizational meanings and actions.

The expatriate experiencing institutionalized marginality, described in the narrative encounters with the home organization as primarily frustrating. Expatriate transactions with the home organization are generally didactic in tone. Many expatriates alluded to
the increased frustration when they returned to the home office because they feel that their unique perspectives are diminished by co-workers and superiors. Their return is often characterized by ignominy.

The theme of institutionalized marginality is frequently characterized by references to being "on the outside" or "in between." Because the expatriate feels different and being different has become a way of life, the expatriate may focus on being misunderstood by others but actually enjoys the distinctiveness this misunderstanding brings and the opportunities to demonstrate an uncommon perspective that this misunderstanding provides. The expatriate may also refer to an "international" community as a referent point with which he/she identifies. This community could also be comprised of individuals who perceive themselves to be marginal - outside an organization's or society's norms.

Example #1 - Institutionalized marginality

Ted has been raised abroad. His father has worked overseas, and Ted as a child traveled frequently with his family. Ted attended boarding school in Europe. As an adult, Ted accepts an assignment in the Brussel's branch of a U.S. law firm. Ted relates two narratives in which he illustrates his unique perceptions and his frustrations as he attempts to convey these perceptions
to the more provincial individuals in the home office. In the one instance, Ted is asked by a partner in the home office to write to a European client regarding a business matter. Ted adapts the style of the correspondence to the style of the client's national culture. The partner interprets the style as inappropriate and reprimands Ted. Ted states that the partner fails to understand the complexities of the client's culture. But the actual point of the narrative is that others have once again misunderstood Ted, and he finds himself "in the middle." In the second instance, Ted is in a conference call with a partner at the home office. Ted is discussing the firm's representation of a foreign country in a border dispute. The partner is concerned that the country will go to war based on the legal decision. Ted is frustrated and amused that the partner is unaware of dispute resolution mechanisms of the United Nations. Ted states that this experience is just one more experience of his need to translate for those who do not have Ted's unique perspective.

The following quote illustrates Ted's difficulty in returning to the home organization after being abroad—an illustration of his marginality.

I guess an analogy for this (his return to the home organization) is when you've gone away to boarding school, and you try to go back and live with your parents . . . You have real difficulty re-inserting
yourself into what used to be your normal environment.

Example #2 - Institutionalized marginality

Dave did not live abroad as a child, but in some ways Dave is a "mind traveler." He is a student of history and has avidly read about the cultures of the British Isles. He explains that he loves the area in Britain where they lived because "you could enjoy 10 centuries of British history" within a 30-40 minute drive. He also spends considerable time during the interview explaining the cultural context of his actions. Dave belongs to an elite international set of racing enthusiasts. He explains how this group is a culture in and of itself. The man Dave most admires he describes as a "young, sharp, rebellious guy . . . great at trashing the establishment." So Dave sees himself as part of a group that has its own rules and its own unique insights that make Dave and his friends uncommon.

Although Ted and Dave both have themes of marginality in their narratives, the degree to which they are institutionalized (incorporated into the behavioral boundaries of organizational domains) vary. On the one hand, Ted interprets and explains his unique perspective to others who do not have his unique vantage point. Ted accepts a degree of organizational control. Through
explanation and argument, Ted is able to provide a vital bridge of understanding between himself and others. Dave also experiences frustration with being misunderstood, but his reaction is to rebel. Dave withdraws into his own perspective and expresses his powerlessness to change how others think.

Alfred Schuetz (1944) describes the experience of the "stranger," an adult who tries to be accepted or tolerated by an approached group. Explaining the relationship of the stranger to the approached group, Schuetz states,

The doubtful loyalty of the stranger is very frequently more than a prejudice on the part of the approached group. This is especially true in cases in which the stranger proves unwilling or unable to substitute the new cultural pattern entirely for that of the home group. Then the stranger remains what Park and Stonequist have aptly called the "marginal man," a cultural hybrid on the verge of two different patterns of group life, not knowing to which of them he belongs. (p. 507)

The "cultural hybrid" referred to by Schuetz is very similar to the expatriates whose narratives reflect institutionalized marginality. Within Schuetz' description of the stranger, the individual is not embedded within an organizational structure and therefore, the institutionalization of the marginality is not an issue. But the experience of being "between" is supported by the work of Alfred Schuetz on cultural transitions.
Illusion

The theme of illusion refers to the experience of unreality for the individual expatriate manager. The experience is characterized by a sense of participation in or colluding in the creation of an illusion. For some the experience is pleasant; others may experience a sense of betrayal. But, for each, the presence of illusion is accepted as part of survival abroad. The costs of piercing the illusion or dropping the veils may be viewed as too costly for the individual expatriate.

The theme of illusion is recognized by references to the unreal or a sense of participation in a play. References to things not being as they appear are also indicative of this theme. The expatriate may acknowledge an inability to be him/herself while abroad. Words such as "fantasy", "play", "acting", and "unreality" are examples of this theme.

Example #1 - Illusion

While Jim is in London on an overseas assignment, the Americans bomb Libya. As he reads the American and British papers, he comes to the realization that the American press is giving false information about the British reaction to the bombing. The British that Jim encounters are not supportive of the U.S. action, and they attack Jim verbally because they view him as
representative of the United States' position. Jim describes this experience.

It was at the time that the United States bombed Libya. And there was this perception from people that I talked to in the United States or from reading U.S. publications . . . that the British people themselves were very supportive of our government's action and primarily that the French were not supportive . . . when in reality those things were twisted.

I would have to say that my experience abroad was characterized by disillusionment.

The experience abroad takes on an unreal quality for Jim. He begins to project a false image of himself. He says that he begins to defend a position that he does not believe or does not reflect who he is. He is not the "super patriot" that the Brits provoke from him. He is not the person who travels in Europe in clothes that are not "typically American" so he will pass unnoticed. But Jim is willing to act, willing to create the illusion for "safety sake." He describes the experience abroad as a disillusionment, but demonstrates the acceptance of illusion in his behavior. He accepts the illusion to "survive." So while abroad, Jim participates in a charade just as he perceives the U.S. doing with American perceptions of the European response to the attack on Libya.

Example #2 - Illusion

Frank is sent to South Africa to participate in a
company sponsored management development program.

Frank's friends and family at home are worried because they are receiving constant information regarding the unrest in South Africa. Frank states:

... it was such a big difference between what we were seeing and doing and what people in the States were seeing and how they perceived we were living. And ... that was our biggest joke because everybody was worried about us and here we are living a life of luxury in the middle of Africa and really enjoying ourselves.

Frank describes attending numerous dinner parties with white South Africans. These dinner parties would include sumptuous meals and discussions about politics over cognac. It is at these parties that Frank begins to accept the white South African justification of apartheid as a necessary illusion for him. To question this illusion would result in the end of a very pleasant fantasy for Frank. He feels accepted and a part of the group that is making his stay in the country so comfortable. Frank's job in South Africa is also an illusion to him. He perceives that the work he is doing abroad is really unimportant. The job is just the pretense for living abroad - another illusion.

Heightened Visibility of Self

Heightened visibility of self refers to the feeling of being exposed in the host culture. The expatriates relate in their narratives experiences in which they feel
that they stand out. This experience may be brought on by the simple realization that the expatriate differs in speech and appearance. But the exposure is at a much deeper level for the individual. The expatriate is responded to as a stereotypic American so he/she seeks to differentiate him/herself in an effort to become an individual. The expatriate seeks out his/her own uniqueness through introspection. This process eventually exposes the individual's idiosyncratic qualities. Also, those aspects of the personality that may be minimized in a familiar setting may be drawn out in a more uncertain environment.

Some expatriates seem to enjoy the exposure, and others experience considerable discomfort. For those who enjoy the experience, they revel in their own distinctiveness. For those who find the exposure uncomfortable, they seek to diminish themselves or mask themselves in generalities as a way of fitting in.

Example #1 - Heightened visibility of self

Fred describes his reason for going abroad as an "opportunity to get international exposure." His narratives portray this exposure while abroad as a mildly disconcerting experience of being the focus of attention, Fred describes walking into a room at the technical center where he works in Luxembourg and hearing his co-
workers speaking in their local language. As his co-workers become aware that Fred has come into the room, they change to English. Fred comments on his feelings at this moment.

... You kind of feel sometimes bad that you make them change the language. I guess it makes you realize that you're different in some way ... I never felt that I was so important that everyone should have to adjust to me.

Fred sees himself as making his co-workers change their language. He has the mildly disconcerting realization that the focus of attention has been shifted to him, and Fred's differences from his co-workers have been highlighted in his own mind.

Fred also describes playing catch with his son in the front yard of his home in Luxembourg. He and his son are wearing baseball mitts. He says that they get a lot of stares from the neighbors. The neighbors call catch "the game with the big hands."

... it was strange to play catch and have people stare at you for doing something that we consider quite normal and yet get a lot of strange looks.

The important element of this experience for Fred is the sense of standing out. He states later,

Americans stand out. There are a lot of ways that one does stand out whether one wants to or not ... but I think that growth comes through this realization; I think you learn a lot about yourself in those sorts of situations.

Fred learns that he is very uncomfortable in situations
where he is the center of attention. He learns what he does not like about being the stereotypic American abroad and learns by adopting local mannerisms to differentiate himself from other more "typical" Americans. Fred consistently describes the experience as developmental. For him, the personal development is to learn about himself and to learn enough of the customs of the culture to fit in.

Bailyn and Kelman (1962) studied the effects of a year's experience in America on the self-image of Scandinavians. The study recognized the impact of a year abroad on the visitor's awareness of self-image and specific reactions to the challenges that the new environment made to that self-image. Bailyn and Kelman recognized that the contrast created by the new culture raised the level of awareness of the visitor to the national, professional, and interpersonal elements of the self-image and need to adjust. The awareness of self-image as described in this research closely resembles the theme of heightened visibility of self.

Summary

This section has identified and explained seven themes that emerged from an analysis of the plots and subplots of the expatriate manager's narratives and reveal the meaning for the individual of a particular
episode or series of episodes. The themes are as follows: failed dependence, escape from complexity, gamboling, nascence, institutionalized marginality, illusion, and heightened visibility of self. These themes provide us with additional insight into the subjective meaning of the experience abroad for the individual manager. The analysis of individuals and places and narrative themes begins to construct a picture of the personal world of the expatriate. Figure 4.2 illustrates the relationship of the themes to the contextual components. Again, we see the mutual influence of contextual elements and themes. The themes emerge out of a context and then subsequently influence and are influenced by future episodes. The next section examines the overarching metaphors or images that help the expatriate to explain and make sense of the whole experience of being abroad. While these themes explain and unify the action for the individual in discrete episodes of experience, the metaphors are individual frameworks that link together a series of episodes within the experience abroad. Examples of ideal types, the metaphors reported in this study identify the elements of a central framework in which, to varying degrees, expatriate managers cluster their unique series of experience. It is possible that an expatriate may have
Figure 4.2: The relationship of themes to the episodes recounted in the expatriate narratives.

Situation

Series of Episodes - encapsulated events of significance for the expatriates

Episode #1
constellation of individual interpretations of contextual components (character and scene)

Theme
dominant pattern that unifies and shapes the episode for the individual (plot and subplot)

Episode #2
constellation of individual interpretations of contextual components (character and scene)

Theme
dominant pattern that unifies and shapes the episode for the individual (plot and subplot)

Episode #3
constellation of individual interpretations of contextual components (character and scene)

Theme
dominant pattern that unifies and shapes the episode for the individual (plot and subplot)
characteristics of two or more metaphors working as they order and give meaning to their experiences. And it is one of the contentions of this study that a retrospective analysis by the individual expatriate of personal central frameworks (metaphors) develops insights into behavior and outcomes of the experience abroad. These metaphors are identified and the elements and characteristics of each are illustrated and explained.

Images and Explanations
of the Expatriate Manager's Experience

Gareth Morgan in Images of Organizations (1986) explores the process of "reading" organizations. He states, "We theorize about or read situations as we attempt to formulate images and explanations that help us to make sense of their fundamental nature" (1986, p. 12). At some point in the experience abroad, the individual expatriate manager begins to construct an explanation of the experience. This explanation involves individual sense-making. Sense-making refers to the individual thought process that reconciles that which is immediately perceived by the senses with the individual's existing formulations of apparent relationships or underlying principles of certain observed phenomena which have been verified to some degree in the past. This process combines that which is known with that which is unknown.
The process of individual sense-making and explanation is based on the use of metaphor.

Metaphors provide the expatriate with a familiar framework in which to understand and make sense of relationships and causality. Metaphors also provide a context for individual decision-making and action. In general, metaphors help the expatriate manager to understand the experience abroad in distinctive yet partial ways. Robert Nisbet (as quoted in Turner 1974) defines metaphor in the following way:

Metaphor is, at its simplest, a way of proceeding from the known to the unknown. It is a way of cognition in which the identifying qualities of one thing are transferred in an instantaneous, almost unconscious, flash of insight to some other thing that is, by remoteness or complexity, unknown to us. The test of essential metaphor, Philip Wheelwright has written, is not any rule of grammatical form, but rather the quality of semantic transformation that is brought about. (p. 4)

Louis Pondy (1983) in a discussion of the role of metaphor in the facilitation of organizational change recognizes the metaphor "helps organization participants to in-fuse their organizational experiences with meaning ... this infusion of meaning ... is a form of organizing" (p. 157). But the metaphor plays a dual role in that it explains the situation and creates the situation. The objective reality of the organization is actually created by underlying root metaphors. Pondy
defines metaphor as "the assertion, perhaps made indirectly and surreptitiously, that "A is B," where A and B belong manifestly to two different categories" (p. 159).

This section identifies four metaphors of the expatriate managerial experience that emerged from the interviews and narratives. As explained in the methodology section, metaphors are identified by examining metaphorical language in the narratives. Additionally the narratives were examined to uncover the characteristic ways in which the expatriate dealt with restraining forces in the experiences which s/he related. Once these two factors are identified, specific characteristics of the metaphor (i.e. response to culture, language patterns, personal philosophy, and individual objectives) are highlighted. These metaphors represent individual frameworks for sense-making and the tacit explanations the individual expatriate manager creates for the assignment abroad. The four metaphors are The Game, The Romantic Journey, The Tragedy, and The Battle.

**The Game**

The experience abroad is constructed as a new game with a new set of rules. The expatriate conceives of the experience as a competitive amusement. Although new
players enter the game and the specific regulations of conduct are unknown, the familiar elements of objective, move/countermove, and the spirit of competition remain consistent. Other individuals who know the rules are necessary and are engaged by the expatriate as an important source of information about the game. The expatriate learns about the culture not to become the opponent but to better engage the opponent in the game—to become a better competitor. Behaviors are strategic, and the expatriate maneuvers to win.

The following cases help to illustrate the expatriate experience when it is constructed as a game.

Case #1

Jeff was sent abroad as a processing engineer. He was assigned to a plant outside of London. Jeff and his British co-workers would work out each day after work and then go downstairs in their office building to a pub. Jeff describes an experience of playing his first game of snooker with his co-workers after work. Jeff was winning, and everyone including Jeff was surprised. The game came down to the last shot. Whoever sank the last ball won. Jeff's co-workers were doing whatever they could to distract Jeff. Jeff recalled that they were prancing around and making faces in an effort to make Jeff break his concentration. Jeff muffed the shot and
the others won. Jeff expressed that he was just very happy to be "in the game," and he didn't care that he had not won. He stated that he was satisfied that he had surpassed his own expectations of his ability to play. This story is a metaphor of how Jeff made sense of his experience as an expatriate.

To Jeff the experience abroad was a game—a challenge to his competitive spirit. The competition was a source of amusement and an opportunity to exceed his own expectations. Winning to Jeff was to learn the rules well enough to be seen as a worthy opponent. The experience abroad was a unique opportunity to act out his own playfulness. Central to Jeff's sense-making was the image of the opponent. The opponent is integral to the game. The opponent is the catalyst for the competition and the source of derived pleasure for Jeff.

Case #2

Chris went abroad as a staff engineer. While there he refused to take his experience seriously. To Chris the culture was always introducing some new assault on his accepted manner of doing things. Whether it was the food, or the "bubbly, warm water," or a standard shift, or the language, Chris approached each with a sense of playfulness that indicated a sense of participating in an exciting game. He even tells of seeking out experiences
that challenged his competitive abilities.

It was fun for me to go out with my friend . . . Somebody in the bar starts talking about nuclear war, so I start trying to talk about nuclear war in French. I can't even speak French, but I'm ranting and raving about nuclear war . . . and you find out later that a lot of the other people didn't really know how to speak French either. But it was fun, and for me it was a game.

But the game was also strategic and Chris maneuvered to his advantage. Chris challenged himself to learn enough about the culture to be able to participate at a respectable level of "play." But Chris only learned that which was useful to him while he was in the game. He commented that he only drove a stick shift until he came back to the States. He concluded his interview with a comment that illustrated his superficial understanding of the rules (cultural assumptions and customs) of the "game." He stated, " . . . you try to fit in with what the other people are doing . . . to be more adaptable . . . but I never had any real understanding or meeting of the minds, not at all." Table 4.1 summarizes the elements of the game metaphor.

The Romantic Journey

The experience abroad is constructed as a part of a romantic journey. The romantic narrative includes poetic or imaginative language. Generally sentimental, the romantic journey is characterized by episodes influenced
Table 4.1: The elements and characteristics of the Game metaphor.

<table>
<thead>
<tr>
<th>element</th>
<th>characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>valuing the opponent</td>
<td>members of the other culture are not avoided - they are engaged and viewed by the expatriate as useful sources of vital information about how to fit in</td>
</tr>
<tr>
<td>references to rules</td>
<td>the expatriate will refer to specific regulations for action within the culture without a clear understanding of the cultural genesis of these rules or the underlying values embedded in these rules</td>
</tr>
<tr>
<td>learn about the culture</td>
<td>the expatriate determines what is important to know about the culture and deliberately seeks this information from cultural informants</td>
</tr>
<tr>
<td>sports or game metaphors</td>
<td>the use of terminology such as &quot;players,&quot; &quot;the score,&quot; and &quot;coach&quot;</td>
</tr>
<tr>
<td>extreme pragmatism</td>
<td>information and relationships are valued on the basis of being able to get the job done</td>
</tr>
<tr>
<td>emphasis on act</td>
<td>the narrative focus is on the act - what is done</td>
</tr>
</tbody>
</table>
more by emotion than reason and acting from feeling rather than from practical or utilitarian motives. The romantic encounters the host culture with a sense of wonder and frames the assignment abroad as a unique opportunity to experience fully the new and unusual. The romantic is described as embryonic in the different culture and refers to experiences of emerging in a new form or state after encountering the unknown.

The romantic narrative contains a hero or heroine as a central character in the experience abroad. This hero is not the expatriate, but someone who plays a central role in the expatriate's experience abroad. The hero may have powers of expression, authority, or passions greater than the expatriate or the hero may possess some greater sense of humanity than the expatriate. But whatever the nature of the hero, the expatriate is enlightened or made better as a result of the encounter.

The romantic engages others in an effort to absorb all that the culture has to offer. Desiring to learn from the culture, the romantic becomes a student of the culture and allows others to uncover the mysteries of the unknown. The experience is described as transforming and may be referred to as a "coming of age." The romantic is an idealist in that the individual aspires to a greater personal capacity as an outcome of the encounter
abroad. The journey is developmental.

The romantic discovers the allure of encountering the different and finds the opportunity for other similar encounters seductive. Drawn to the thrill of the adventure, the romantic embraces each experience and the emotions that experience evokes.

The following are cases of expatriate narratives that represent the image of a romantic journey.

Case #1

Sam explains his reasons for going abroad "as much as anything for the excitement of it." He describes the experience of having their first child, their only child, while living in Paris. He explains that normally when you are becoming a parent for the first time you have your family and friends around you as a support system. But he and his wife did not have that support system in Paris. When their son was born he was premature and Phil and his wife were really struggling to even figure out how to feed him. "We couldn't even figure out how to make the hole in the nipple big enough so that he could possibly eat out of this thing." But someone at work put Phil in touch with a woman whom he called a "grandmother for hire." He describes the experience with this women in the following way.

She was in her 70's, and it was at the time that the White Russians were still living in Paris. She
became our part-time housekeeper, nursemaid, grandmother-in-law. She took care of us and she introduced us to a number of other members of this Russian community in exile. We had a number of very memorable meetings with another generation from another time and place. She was a fascinating person. For example, the first time I was going to London, I'd never been to London before, and she was telling me about what it was like in London. And I'd asked her if she'd been to London before, and she said of course she had been to London before; she had been on television there. I didn't really pay that much attention to her comment, but the next time she came over before my trip she brought some photographs of her with Lord Mountbatten, and she was on *This Is Your Life*, the UK program. When she was a very young woman living in Estonia, she was from a very well-to-do family. At a very early age she was married off to a Russian admiral, and she taught Lord Mountbatten Russian. She was fascinating for us. It was like a magic artichoke; everytime you picked up a leaf, there was some kind of experience. During that time, I think we became more well-read, we learned about food, learned about wine. It was just a great educational experience for us.

Note how Sam describes himself in the beginning of the narrative as young and naive. Through the intervention of the Russian woman, Sam is enlightened. Notice also the use of figurative language to describe the experience. Later, Sam says of himself while abroad, "I was somebody looking for an interesting life . . . a Hemingway-type of experience. We weren't exactly a lost tribe, and yet, we wanted to experience some of that, that type of Paris."

Case #2

Tom describes going to Mexico for personal
enrichment. Tom recounts an event that occurs shortly after Tom and his family settle in their home outside of Mexico City. Tom is at his office, but his wife is at home in their yard. She hears a sound and turns to see their dog fall from the front porch. Tom's neighbor is working in his yard and sees the dog fall also. The neighbor realizes immediately that the dog has been poisoned. He runs from his yard and rushes Tom's dog to his car. Before Tom's wife can return from the house with the keys to her car, the neighbor has driven the dog to the vet in his own car. The neighbor stays with the dog until he is sure the dog will live. When the neighbor returns home, he finds that his own dog has been poisoned also and has died while he was at the vet. Tom is amazed at the selfless behavior of his neighbor. Tom relates three other episodes in which acquaintances from the Mexican culture demonstrate selflessness in their relationships with Tom and his family. Tom refers in his final narrative to the topographical beauty of the area and the creative talents of the people. He describes vividly the fruits of Mexican labor, and the beauty created with so few resources.

Tom feels that through these acts of selfless giving and exposure to the native beauty, he has developed a great admiration for the Mexican people and has learned
how to accept the kindnesses of others. Tom seems to have left his heart in Mexico. Table 4.2 summarizes the elements of the romantic journey metaphor.

The Tragedy

The experience abroad is constructed as a tragedy. The expatriate, in the tragedy, is defeated by the natural environment or the natural order of things. The natural environment is the host culture and the natural order of things is an inevitable chain of events that eventually leads to social criticism of the expatriate and social isolation. The expatriate becomes a victim of forces outside the expatriate's control. In executing the requirements of the job abroad, the expatriate is caught in a conflict between the inner and outer world.

The tragedy is characterized by episodes of personal defeat or failure. The defeat may be the result of an innate flaw or simply the result of being in an exposed position. The expatriate expresses feelings of abandonment and of being forsaken. The expatriate may engage in intense introspection to determine what went wrong.

The following cases illustrate the tragic experience.

Case #1

Upon arrival in London, Steve experiences a very
Table 4.2: The elements and characteristics of the Romantic Journey metaphor

<table>
<thead>
<tr>
<th>Element</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. presence of a hero/heroine</td>
<td>specific individuals aid the expatriate in a personal transformation - these individuals are imbued with special insights or qualities that raise them above ordinary people</td>
</tr>
<tr>
<td>2. references to the exotic</td>
<td>the culture and the people are described as strangely beautiful and enticing</td>
</tr>
<tr>
<td>3. a sense of the greater good</td>
<td>the expatriate is directed by a strong belief in the universal values of beauty, knowledge, and giving</td>
</tr>
<tr>
<td>4. learn from the culture</td>
<td>the expatriate is open to acquiring insights based on what the culture is willing to teach the expatriate</td>
</tr>
<tr>
<td>5. figurative language</td>
<td>metaphor, similes, personification, hyperbole</td>
</tr>
<tr>
<td>6. idealism</td>
<td>a conception of things as they should be or how one would wish them to be</td>
</tr>
<tr>
<td>7. emphasis on sensory elements</td>
<td>the narrative focus is on place - the setting is described in colorful detail and draws on several of the senses for input (sights, sounds, smells, tastes)</td>
</tr>
</tbody>
</table>
upsetting episode. He becomes lost in London and is unable to find his way back to his hotel. His wife finally recognizes some landmarks and leads them back. Steve describes the shock and disorientation that he experiences as a result of being lost. He comments that he tries to get a sense of north and south because that's how he orients himself, but he can't get a sense of direction. He also states that this experience characterizes the 20 months he spends in England. He explains that he never is able to get a sense of north and south. This event is a harbinger in Steve's mind of events to come. This experience seems to Steve to set in motion a series of events that leads to Steve's defeat at the hands of the British culture and his inevitable isolation from the British. Steve explains later that he is unable to make contact with his neighbors. He states that the neighbors want to "keep the relationship to the fence," referring to the fence that separates Steve's home from his British neighbors.

Another account illustrates Steve's sense of being controlled by outside forces greater than himself. Steve is sent to London to work in the alternate energy group. But within four months of arrival, the company makes a decision to not pursue alternate energy sources. The group to which Steve is attached in the States is
dissolved. The company has made a decision that Steve sees as beginning another inevitable chain of events that leads to Steve's defeat and eventual isolation from the home office. He speaks of trying to maintain contact with individuals back home but with little response. Steve expresses his frustration and helplessness in trying to maintain attachments to his professional counterparts in the States.

Steve concludes his interview with a statement of his newly gained insights into himself and the British culture. It is as if Steve is able to justify his suffering by extracting a learning or moral to his story.

I had been so critical of these people and their supposed lack of understanding of me, which probably existed . . . maybe they just didn't want to understand me. But I was a guest in their country . . . It didn't dawn on me until the very end that they're (the British) just different. There's no judgment to be passed. They're not better; they not worse. They're just different.

Case #2

Fred is assigned to Buenos Aires. Fred's job assignment is also changed when he arrives. He is originally sent to Buenos Aires to be a project manager, but he is made a technical advisor by his local superior. Fred explains that his boss did not want to take the position away from the local manager because this would cause less cooperation among management and the locals.
In his new position, Fred begins to criticize the work of others. He sees this as his role as technical advisor. Eventually, Fred finds himself isolated from his co-workers.

So they pushed me off into a corner more or less. I was in an office and that was it. I had a Spanish instructor that came in everyday . . . but they (local manager) would never come and volunteer information to me . . . The first four months were very difficult for me.

But Fred accepts the way things are done in Argentina and is able to justify his own adaptation. Before this acceptance, Fred blames his boss in the U.S. and states that he feels he has been lied to. As in Steve's case, Fred has an experience that sets in motion a chain of events that take control away from Fred and places him in a position which leads to his eventual defeat and isolation.

In each of these cases, a sense of defeat is experienced by the expatriates, but defeat at the hand of natural forces much greater than the expatriate. The expatriate expresses feelings of powerlessness and social isolation. Note also that the expatriate identifies the greater force after experiencing isolation. It is as if the expatriate must vindicate his own downfall through the acceptance of more powerful forces or the inevitability of the natural order of things. Table 4.3
Table 4.3: The elements and characteristics of the Tragedy metaphor

<table>
<thead>
<tr>
<th>Element</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. the harbinger</td>
<td>an event that sets the tone of the experience abroad - this event implies that the expatriate is not in control of what is happening</td>
</tr>
<tr>
<td>2. defeat and social isolation</td>
<td>the expatriate experiences a sense of failure or disappointment - this experience leads to a period of isolation or the feeling of being cast out</td>
</tr>
<tr>
<td>3. the moral</td>
<td>the expatriate relates a universal lesson that has been revealed from having been cast out - a time for introspection</td>
</tr>
<tr>
<td>4. culture contains the key to the natural order of things</td>
<td>the expatriate identifies general cultural dimensions to help define the order of nature in this new society</td>
</tr>
<tr>
<td>5. tragic language</td>
<td>the use of terminology such as &quot;failure,&quot; &quot;defeat,&quot; &quot;out of control,&quot; &quot;isolation,&quot; &quot;abandonment&quot;</td>
</tr>
<tr>
<td>6. fatalism</td>
<td>acceptance of the way things are - certain facts lead to certain outcomes</td>
</tr>
<tr>
<td>7. emphasis on the main character</td>
<td>the narrative focus is on the expatriate - introspection and self analysis occupy much of the narratives - what can be learned to justify the expatriate's suffering?</td>
</tr>
</tbody>
</table>
summarizes the elements of the tragedy metaphor.

**The Battle**

The experience abroad is constructed by the expatriate as a series of skirmishes against opponents with different ideologies. Within the metaphor of the battle, the expatriate often follows a different set of rules which might be unacceptable except in "wartime." There is a sense of fighting for personal survival or the survival of a particular way of life.

The expatriate also describes having to "fight" the control of "headquarters" to be able to do what has to be done to win. The expatriate is actually "in the field" and knows better than "the generals" back home what needs to be done to accomplish the objectives. The expatriate may keep the home office informed minimally to avoid unnecessary explanations of behavior that can only be justified in the context of the battle being waged.

The expatriate conveys a high regard for the opponent as long as that opponent engages in a good fight. The opponent must demonstrate wit and cunning to gain the respect and admiration of the expatriate. But ultimately the opponent is expendable, and the expatriate moves on to another battle that challenges his abilities of strategy and maneuvering.

The host culture is the battleground and must be
understood so that the expatriate can think like the opponent. This knowledge is used to strategically gain the initiative. The expatriate will also engage in the questioning of others' motives. The expatriate evaluates individual action in light of the fact that the opponent is out to gain a strategic advantage just as the expatriate is out for similar objectives.

The following case illustrates the battle metaphor.

Case #1

Alan is sent abroad by his company to arrange the promotion of the company's product through international events that demonstrate the product's uniqueness. Alan moves from country to country and continent to continent in the promotion of this product. As he describes his experiences abroad, he makes frequent reference to historic battles and the influence of WWII on current attitudes towards Americans.

When asked to describe his relationship with the home office, Alan replies that he had virtually complete autonomy. He explains that his immediate superior at the home office provided support, but Alan was free to conduct his business in any way he determined appropriate.

You can't do it any other way. It's just like once you decide that you are going to war, the Congress and the general staff cease to be a factor, because the guy on the ground is holding the land.
Alan spends time justifying his behavior in this context as appropriate for the position he occupies. He expresses frustration with American business ethics that restrict him from maneuvering within differing ethical environments abroad.

Alan describes his relationships abroad as participation in an elite corp of international bon vivants. But this group was also aware of what they were about, and were able to strategically stage these international events. They negotiated using the values of the culture and yet they also viewed themselves as outside the constraints of any one culture. This corps would come into a country, stage an event, then reappear in another country two weeks later and do the same thing. These events took on the image of skirmishes. Alan describes his admiration for these individuals and how each must do what he knows best to be able to "win." Winning appears to be able to survive to the next skirmish. Table 4.4 summarizes the elements of the battle metaphor.

Summary

This section has identified and illustrated four metaphors for the expatriate managerial experience. These metaphors represent subjective constructs which help the individual manager to make sense of the
<table>
<thead>
<tr>
<th>Element</th>
<th>Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. opponent is expendable</td>
<td>the opponent (host culture) is necessary for the good fight, but it is expendable - the fight is what is important, and the opportunity to engage in the next battle</td>
</tr>
<tr>
<td>2. questioning motives</td>
<td>the expatriate is suspicious of other's motives - actions are viewed as strategic and therefore may not be as they seem</td>
</tr>
<tr>
<td>3. cultural awareness is strategic</td>
<td>the culture of a country provides information to gain the advantage - history and cultural assumptions are keys to anticipating the opponent's strategy.</td>
</tr>
<tr>
<td>4. war terminology</td>
<td>&quot;fight,&quot; &quot;battle,&quot; &quot;maneuver&quot;</td>
</tr>
<tr>
<td>5. esprit de corps</td>
<td>common objectives among those engaged in the &quot;fight&quot; - a sense of group and the presence of cohesion</td>
</tr>
<tr>
<td>6. emphasis on motive</td>
<td>the expatriate focuses on the intentions of others - what are the agendas behind individual action</td>
</tr>
</tbody>
</table>
experience abroad. The metaphors identified are The Game, The Romantic Journey, The Tragedy, and The Battle.

These metaphors have implications for individual decision making and behavior. This research is not able to conclude how these metaphors are constructed by the individual, but it is clear that the metaphor emerges out of a complex interaction between the expatriate manager, the cultural milieu, and a sequence of interpersonal relationships beginning even before the expatriate goes abroad. But once the metaphor evolves within the sense-making mechanisms of the individual expatriate, the metaphor appears to become the cognitive context in which the individual chooses among alternatives and formulates actions. Originally developed as a partial explanation for what is happening to the individual, the metaphor then has the potential to control subsequent experiences.

The metaphors can be classified using a scheme that distinguishes the individual expatriate's subjective experience as positive or negative and as instrumental or expressive. Figure 4.3 illustrates this typology.

Themes and metaphors are related in complex ways. Episodes of subjective experience are thematic and reflect individual beliefs about relationships, causality, and values. Out of these episodes, over time, emerge overarching images that illustrate subjective
Figure 4.3: Metaphor Typology

A POSITIVE EXPERIENCE

The Romantic Journey

AN EXPRESSIVE EXPERIENCE

The Tragedy

AN INSTRUMENTAL EXPERIENCE

The Battle

A NEGATIVE EXPERIENCE
connections between significant episodes. The relationship between themes and metaphors is orthogonal. Themes appear to represent enduring characteristics of the individual's being and remain relatively immutable. Each theme can exist within a particular metaphor framework and the expatriate manager responds to a them in ways that are consistent with a particular framework.

Themes and metaphors are similar in that they usually exist at the tacit level of knowledge for the individual expatriate. The patterns are implicit and remain embedded in the narratives of specific events or series of events. As Victor Turner suggests, "It is likely that scientists and artists both think primordially in such images; metaphor may be the form of what M. Polanyi calls 'tacit knowledge'" (p. 25). Themes and metaphors may or may not be consistent with home or host organization values.

Finally, themes and metaphors are different in that themes are episodic while metaphors tend to be cumulative. The expatriate's subjective experience is characterized by individual meaning for a particular series of related events encapsulated in a specific time frame. This meaning is the essence of theme. The subjective experience is also characterized by a frameworks that connects in a meaningful way a series or
sequence of episodes that constitute the assignment abroad. This framework is metaphor. Figure 4.4 represents this relationship.

The implications of themes and metaphors for the individual and the organization are discussed in the next chapter.

Summary

This chapter has described and illustrated the subjective experience of the expatriate manager through an analysis of individual narratives. The subjective experience has been described in terms of the complex context in which individuals attempt to explain their experiences (subjective and objective context), the dominant and recurrent patterns that unify particular episodes or series of episodes (common themes), and the overmarching images that help the individual to understand the managerial experience abroad (metaphors).

This analysis develops a portrait of the experience abroad as highly complex and acknowledges the crucial role that the individual plays in the development and outcome of the experience. Although factors external to the individual have a significant influence on the assignment abroad, this research recognizes the considerable power of the individual through internal sense-making mechanisms to shape and control the
Figure 4.4: The subjective experience of the expatriate manager.

THE SUBJECTIVE EXPERIENCE
(meanings, relationships, causal linkages, and values unique to an individual)

- Individual Interpretations of Contextual Components
  - cultural environment
  - home organization presuppositions
  - host organization presuppositions
  - the work itself
  - interpersonal relationships

- Stories (sequence of related events that remain memorable)
- Narratives (series of stories and includes connecting phrases and explanations)

- Themes (significance or meaning)
  - failed dependence
  - escape from complexity
  - gamboling
  - nascence
  - institutionalized marginality
  - illusion
  - heightened visibility of self

- Metaphors (overarching framework)
  - game
  - romantic journey
  - tragedy
  - battle
subjective reality of the experience.

Specific conclusions and implications of this study for the individual, the organization, and future research will be discussed in the next chapter.
CHAPTER 5

Conclusions and Implications

This study of expatriate narratives has revealed much about the subjective world of the individual working abroad. It has illustrated a complex cultural, organizational, and interpersonal context that interacts with personal sense-making mechanism and the resulting formulations of the experience by the individual expatriate manager. Several conclusions and implications have emerged from this research. Beginning with the general implications of this research for our knowledge of the subjective experience of the expatriate manager, this chapter continues with a discussion of the implication of the research for the individual and organizational outcomes. It concludes with a discussion of the results in relation to future research.

General Implications

The role of the contextual components in this study has been to define a context for the identification of themes and metaphors. One important implication of this research is the unexplored relationships between the contextual components and individual sense-making processes. As noted earlier, Meryl Louis (1980) identified others' interpretations, local interpretation schemes, predispositions and purposes, and past
experience (p. 242) as contributors to individual sense-making in transitional experiences within an organizational setting. This study infers that the degree of difference of the cultural environment, home organization presuppositions, host organization presuppositions, and relationships with particular individuals are relevant to individual sense-making in the expatriate managerial experience. These contextual components identified in this study are consistent with Meryl Louis' findings and may even help to refine Louis' categories. Additionally, this study identifies the nature of the work itself as relevant in the individual experience of the assignment abroad. This characteristic is not mentioned in the literature reviewed for this study and may represent a unique contribution to our understanding of the experience for the individual. The identification and specification of the contextual components of the expatriate experience open new possibilities for the investigation of complex relationships between the components, individual sense-making, and individual and organizational outcomes.

This study has identified seven themes that reflect the subjective experience of the manager working abroad. Three of these themes have been referred to in other literature about the transitional experience (failed
dependence, institutionalized marginality, heightened visibility of self), three themes represent what appear to be new conceptualizations (gamboling, nascence, escape from complexity), and one theme remains questionable (illusion).

The theme of failed dependence is consistent with the description in Meryl Louis' work in newcomer socialization (1980) and Schuetz, description of the "stranger" abroad. The theme of failed dependence reported by the expatriates represents both the organizational transition and the cultural transition and may indicate a more intense experience of a breakdown in normal sense-making mechanisms. Institutionalized marginality is supported by the work of Schuetz (1944) in which he describes the "marginal man as a cultural hybrid on the verge of two different patterns of group life" (p. 507). But Schuetz' concept of marginality does not include the component of organizational membership issues as described by expatriate managers. The institutionalization of the expatriate is a unique element of marginality for the manager abroad. The theme of heightened visibility of self is supported in the work of Bailyn and Kelman (1962) in which they describe a new awareness of self-image among visitor's abroad. The theme of heightened visibility of self is consistent with
this research but also adds the element of a feeling of exposure. The expatriate manager describes an intense awareness that s/he is the focus of attention and stands out among his/her peers. The reactions to this experience are unique depending upon how the individual responds to this experience. Other research does confirm the existence of the three themes discussed above, but the experiences described by the expatriate managers may reflect unique elements of the themes for the actual experience of working abroad in a business context.

The themes of gamboling, nascence, and escape from complexity are not described in the literature reviewed for this study. The implication may be that these themes represent previously unarticulated elements of the experience abroad. In reviewing these themes, it is possible that these themes are not consistent with organizational values or perhaps that they reflect a less rational approach to the organizational experience. That is, organizational literature does not validate the usefulness of play, or naivete, or escape for the accomplishment of organizational goals. Additionally, each of these themes may represent a less than rational or reasoned approach to organizational experience. Reflecting an emotional, spontaneous, and intuitive response, these themes are perhaps not consistent with a
more traditional organizational perspective of what should unify the actions of organization members and therefore do not appear in the literature. But these themes appear to be relevant in a portion of the sample used in this study and represent a unique contribution.

The theme of illusion still remains questionable. The outside coder consistently could not identify this theme using the description and the interview transcripts. Without confirmation by an outside source, conclusions regarded this theme are limited. But the experience of being disillusioned and then the acceptance of illusion as a necessary ruse for survival still remains central in the expatriate descriptions of portions of their experience. I believe that something is there and that this theme needs further study and refinement or modification to determine if it is representative of subjective experience.

This study has identified six themes that expand our understanding of the subjective experience of expatriate managers. Three of these themes have had some characteristics supported in the literature, three are new perspectives, and one remains questionable and requires further study. These themes contribute to our knowledge of the individual's values, causal linkages, and relationships while abroad and provide us with a
working vocabulary for the investigation of the impact of these themes on the individual and the organization.

Implications for the Individual

In Bandura's work on reciprocal determinism (1978), the role of the self system in the explanation of human behavior is explicated. Bandura emphasizes the mutual influences of personal and environmental factors in the production of behavior. He states:

Through their capacity to manipulate symbols and to engage in reflective thought for innovative action, they (self-systems) can generate novel ideas and fashion new environments for themselves and others. (p. 351)

For this reason, the subjective interpretations identified in this research must be recognized as critical determinants of human behavior and as important contributions to our explanatory and predictive power within the context of the managerial experience abroad.

The individual's subjective interpretations of experience constitute a conceptual framework. The framework becomes a mosaic of related premises that informs individual action. As the individual interacts with individuals within a context, the premises are played out in relation to the premises of the other. The nature of these relationships depend in large part on the mutual acceptance of premises. Therefore, the individual who constantly has his/her premises rejected by the other
experiences frequent conflict. The conflict is at the existential level for the individual threatening the propositions that constitute subjective reality. Allowed to remain tacit, the propositions continue to confound the individual as s/he moves in and out of relevant relationships and environments. One implication of this research for the individual is in the process of retrospective sense-making. That is, the expatriate may, through an analysis of patterns in personal stories and narratives, begin to explain his/her actions and reactions while abroad. These explanations can validate the individual experience as more than just a set of unconnected events. This analysis of patterns can also provide the expatriate with a vocabulary for discussing the experience with other returned expatriates.

Another implication of this study for the individual is the validation of story-telling. This study indicates that stories have possible functions for the individual. On the one hand, the story may be a method of connecting the experiences of the past with the here and now. But the telling of stories may also be an attempt by the individual to articulate premises and to legitimate subjective reality.

This study also provides a methodology for the analysis and explication of premises as illuminated
through themes and metaphors. This research develops a systematic analysis for the diagnosis of the underlying meaning of stories and narratives. Combining the methodologies of literary criticism, rhetorical criticism, and ethnography, specific analytic steps have been developed that can be replicated using a variety of symbolic artifacts as data. For the individual, the methodology encourages systematic investigation of deeper meanings in the experience. The specific implications for the expatriate manager are discussed in the next section.

Implications of the Research for the Expatriate Manager

The specific implications of this study for the individual expatriate manager are several. The first has to do with the potential for personal growth and development.

A set of criteria for the appropriate development of the manager abroad might be created and then a comparison done for each expatriate based on the potential of each theme's contribution to this development. But such an approach to the data is questionable and assumes perhaps only a narrow spectrum of acceptable subjective patterns. Patterns can not easily be judged as good or bad; they simply are individual methods of adjustment - ways of
making sense of the world. But perhaps one way to assess these themes and to draw some tentative conclusions regarding them and the individual is to examine the relationship of these themes to individual choice making.

If the individual expatriate develops these patterns to explain the experience abroad, and yet never has the opportunity to identify and articulate these patterns other than indirectly through shared anecdotes of the experience abroad, the expatriate never has the opportunity to examine the consequences of these patterns for him/herself. The expatriate may also never have the opportunity to make personal choices about the value of these patterns for the individual. As the expatriates shared the narratives for this research, several began to become aware of their own meanings for the experience and also to develop some learnings for future experiences abroad. **It appears that it is the process of examining our own sense-making that provides the greatest opportunity for personal growth and development.** The awareness of personal patterns and themes provides the individual with the power to explore consequences and choose from possible alternatives.

Kenneth David (1971) explores the relationship of self-awareness to the experience abroad. He suggests that the experience of going abroad provides the
individual with a unique opportunity to gain greater insight into personal assumptions and attitudes. Peter Adler (1975) also explores the developmental possibilities of the assignment abroad. Adler describes the transitional experience as an opportunity that, when successful, results in "movement of personality and identity to new consciousness of values, attitudes, and understandings." (p. 15). Pivotal to this new awareness, according to Adler, is the "intensity of the experiences, the general resiliency of the individual, or the interpretation and guidance provided by significant others." (underscore added), p. 17). The study reported in this paper also indicates the opportunity for the individual to gain greater insights into self. But these insights may remain implicit or tacit. The analysis of personal narrative themes and metaphors can assist in the process of increased self-awareness and personal growth.

A recent article in International Management (July/August 1988) uses an executive case study to illustrate an expatriate "dilemma and decision." A solution to the case is then proposed by a professor of Organizational Psychology that includes becoming aware of patterns and then breaking those that do not lead toward the expatriate's personal objectives. This approach seems to support the assumption that personal
knowledge of subjective interpretations empowers the expatriate to make choices regarding consequences.

A second implication of this research for the expatriate manager has to do with the validation of individual experience. If the expatriate can identify his/her own experience in the variables, themes and metaphors described in this study, the validation of individual experience can occur. It is important for the individual expatriate manager to be able to locate his/her own experience in the context of several experiences. This locating affirms the subjective experience. The expatriate becomes part of a culture that is connected by mutual patterns of behavior and ways of interpreting that are developed through commonalities of experience. This expatriate culture is distinguished from a class in that the class simply implies common characteristics rather than a common basis for interpreting the world. For many returned expatriate managers, this sense of being part of a common group can help to stem the isolation that some experience.

Third, this research can assist the individual in understanding the sense-making process of others. Whether those others are expatriates or members of other cultures or home office personnel or spouse and family, this understanding can lead to better interaction and
relationships in the future. The expatriate can validate and bridge the experiences of others.

Fourth, this research may help the expatriate to gain greater cognitive flexibility. The expatriate's ability to use multiple metaphors to understand an event or series of events contributes to the potential for flexibility of understanding and greater adaptation to different cognitive frameworks. The individual can become more creative in how the experience abroad is understood and perhaps how other events outside of the expatriate experience are also understood.

Fifth, some feel that reading of others' experiences may help to better prepare the individual. This may be true. Much can be done to decrease individual ambiguity prior to departure through clear, consistent expectations; country data; accurate job descriptions; but this approach must be coupled with examples of individual sense-making from others' assignments abroad. This approach can highlight the importance of individual patterns and meanings as well as provide rich metaphorical language that they can later reflect back on while abroad. The process of literary analysis contributes to the expatriate's awareness of associations, emotions, and imagery as clues to individual patterns of subjective meaning. The keeping
of a personal journal while abroad in which the expatriate records specific events and emotions would provide data rich with personal patterns and meanings. This data could be used in periodic expatriate development meetings and could also be used to encourage expatriates to write and publish literary accounts of assignments abroad. These accounts can assist in preparing others and also as a source of theory building.

**Implications of the Research for the Organization**

**Themes and Organizational Goals**

Each organization engaged abroad strives to accomplish specific goals through individuals working in and representing that organization. The ultimate goal of the parent organization is survival. Specific subgoals supporting the primary goal may include making a profit, meeting the needs of the client or customer, product innovation or new business development, controlling costs, developing natural and human resources, and creating goodwill between the parent organization and host culture. Although other industry-specific goals may exist for a given organization, the identified subgoals provide a framework in which to explore the implications of specific themes.

As the individual expatriate manager begins to experience a pattern of failed dependence, implications
for the parent organization to which he/she belongs become significant. Because the individual is unable to rely on previous explanations of events, that person may withdraw into environments that are familiar and unchallenging. If this familiar environment is work, the organization may benefit from increased industriousness on the part of the expatriate. If the work is self-contained and does not require direct contact with ambiguous elements of the host culture, the expatriate's job can be done. But if the individual's work requires interaction with and responsiveness to the host culture, failed dependence can result in a lack of individual productivity, high performance, creativity, risk taking and eventual loss of meaning in work resulting in alienation from the organization.

Escape from complexity may assist the organization through the expatriate's tendency to simplify. Simplification allows the individual to move away from analysis to action. To some degree each expatriate must be able to understand complex phenomena at a concrete level to provide the basis for action. But oversimplification can direct the behavior of the expatriate away from organizational goals. If the expatriate persists in reductionist thinking or is unable to move from the concrete to the complex, then the
organization may suffer from myopia and ignore critical nuances in the domain.

Gamboling, for the expatriate, is often a way of gaining entre into the host organization or host culture. If gamboling provides access to critical contingencies for the organization within the environment abroad, then expatriate playfulness can contribute to organizational goals. But on the other hand, if gamboling becomes the central purpose of the assignment abroad for the individual expatriate, then the organization may suffer from underutilized human resources. The experience abroad may be viewed by the expatriate as unrelated to his/her total career development and may simply be viewed as "time off."

Nascence, through the eyes of the expatriate, can provide the organization with a fresh new look at what it is doing. Just as the neophyte in the organization can present a new perspective on an organizational culture, the expatriate manager who has developed a pattern of confronting the host culture with a sense of wonder can also provide new insights into previously accepted perceptions. The organization can experience a renewal if nascence is valued. But the organization can suffer if the expatriate views the experience of nascence as overwhelming and through the experience diminishes
his/her own contribution. If the organizational culture perceives nascence as naivete and does not capitalize on the energy and perspective that nascence can bring to the organization, a valuable human resource may be lost.

The expatriate who experiences institutionalized marginality develops a keen perspective that is not deeply embedded in any one set of cultural assumptions. These individuals could be utilized in crucial linking positions within the organization. An organization that conducts transactions across cultural boundaries has a need to bridge certain functions through the help of a cultural interpreter. But these individuals, if not brought within the institutional domain of the organization, can create disenfranchisement of the self and other. If the marginal expatriate rejects the parent organization's perspective, then the expatriate may encourage others to work around the system to avoid the restraints of a home perspective. The ability of the organization to capitalize on institutionalized marginality may have a great deal to do with how the expatriate defines his/her personal mission. For some marginal individuals the mission is to explain and persuade. For others, the mission is to punish the organization for being so provincial and not having keen insights into the culture. It is important to the
organization to determine which mission is functioning for a given individual.

The theme of illusion can advance the organization toward its goals if the expatriate begins, through an awareness of illusion, to question and investigate the motives of others. The expatriate who understands illusion may be more sensitive to hidden agendas and may be able to participate more effectively in organizational settings that require an awareness of unstated motives. But if the expatriate can not accept illusion as part of the politics of interaction, then illusion can lead to disillusionment and eventual mistrust that can be debilitating to the expatriate and ultimately harm or, at a minimum, not help the organization.

Finally, the theme of heightened visibility of self can allow the expatriate to attract attention to him/herself and to use this focus on the individual to take the initiative. When the expatriate moves into the new environment, there is a period of increased awareness of the newcomer. If the expatriate understands this visibility as a pattern in transactions, the individual may be able to directly influence the host organization's perception of the home organization and the relationship to the home organization through his/her own behaviors. But in contrast, if the expatriate uses this sense of
heightened visibility of self as an excuse to withdraw, then the organization may lose a valuable opportunity for influence. If the expatriate simply works to fit in, then the opportunity to have mutual influence among the home and host cultures is lost. The expatriate must be able to develop a sense of his/her own uniqueness without a total rejection of his/her own cultural assumptions.

The previous discussion has presented some possible implications for the home organization of individual themes. These implications are by no means exhaustive, but they do begin to indicate that how the organization manages individual sense-making while abroad could directly affect organizational outcomes. That is, the potential for positive and negative outcomes in relation to organizational goals are present in each pattern or theme identified by this research. If the home organization is unaware or disinterested in the emergence and development of these themes for the individual expatriate manager, then the consequences of these themes will remain arbitrary and haphazard. Table 5.1 summarizes the potential outcomes of the themes for the organization.

The next section looks at the positive and negative outcomes of expatriate metaphors for the organization.
Table 5.1: Summary of positive and negative outcomes for the organization of expatriate themes.

<table>
<thead>
<tr>
<th>theme</th>
<th>positive outcomes</th>
<th>negative outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>failed dependence</td>
<td>The individual expatriate may withdraw from the source of failed dependence and remain within environments that are familiar. If this environment is work, then the organization may benefit from increasing commitment to the organization.</td>
<td>The individual expatriate may withdraw from the source of failed dependence and seek out the familiar. If the work of the expatriate requires contact with the unfamiliar and ambiguous, the expatriate may decrease productivity and increase alienation.</td>
</tr>
<tr>
<td>escape from cognitive complexity</td>
<td>The tendency in this theme to simplify helps the expatriate to move from analysis to action.</td>
<td>The tendency to simplify may prohibit the expatriate from understanding complex issues and accomplishing organizational goals.</td>
</tr>
<tr>
<td>gamboling</td>
<td>Playfulness is one way to help the expatriate enter the host culture.</td>
<td>Playfulness as the primary function of the assignment abroad leads to underutilized human resources.</td>
</tr>
<tr>
<td>nascence</td>
<td>The expatriate experiencing nascence can provide fresh perspectives on culture and organizations.</td>
<td>If nascence is viewed by the organization as naivete, the energy and perspective that nascence can bring will be lost.</td>
</tr>
<tr>
<td>institutionalized marginality</td>
<td>Institutionalized marginality may be capitalized on by the organization by creating crucial linking roles for the expatriate that serve as bridges between diverse perspectives.</td>
<td>If marginality results in an attitude of superiority, the expatriate may develop a disassociation with organizational purposes.</td>
</tr>
<tr>
<td>illusion</td>
<td>Illusion can lead to a questioning of unstated motives or hidden agendas</td>
<td>Illusion may lead to the disillusionment and mistrust of organization and individual motives.</td>
</tr>
<tr>
<td>heightened visibility of self</td>
<td>Visibility of self can provide the expatriate with an opportunity to attract attention and take initiative.</td>
<td>This heightened awareness may be so uncomfortable for the expatriate that s/he withdraws and gives up any possibility of influence.</td>
</tr>
</tbody>
</table>
Organizational Outcomes and Expatriate Metaphors

How the expatriate makes sense of the experience abroad affects how that individual behaves within the context of the assignment abroad. These behaviors imply the potential for both positive and negative outcomes for the organization. That is, as the individual develops a framework for understanding the expatriate experience, individual action may or may not lead to specific organizational objectives. Table 5.2 identifies some of the possible outcomes for the organization of each metaphor.

As with the implications of the themes, the potential for both positive and negative outcomes of the metaphors indicates the importance of the organization remaining vigilant. Specific ways that the organization may respond to the subjective experience of the individual are discussed in the next section.

The Organization's Response

During the interviews with the expatriates, it became apparent that organizations send individuals abroad for a host of reasons. Personal and professional development, providing a unique skill, and establishing vital linkages to a foreign subsidiary are some common reasons. But organizations also seem to use the
<table>
<thead>
<tr>
<th>theme</th>
<th>positive outcomes</th>
<th>negative outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Game</td>
<td>The expatriate focuses on getting the job done. If the assignment abroad is only to provide technical assistance, the game metaphor can be productive. The individual learns on a need to know basis, and information is acquired for its immediate usefulness. The game metaphor implies a practical nature and a limited resourcefulness.</td>
<td>If the organization must change the scope of the assignment, the game metaphor limits the expatriate's ability to learn that which may not be considered immediately useful. More general understanding of the host culture would allow for more creative uses of cultural assumptions.</td>
</tr>
<tr>
<td>Romantic Journey</td>
<td>The expatriate tends to provide the organization with a broader knowledge of and access to the host culture. This knowledge can be useful in planning broad-managerial objectives in the context of the host culture.</td>
<td>The expatriate can develop strongly divided loyalties. The expatriate may be absorbed deeply into the host culture and be unable to integrate back into the home organization upon return. The expatriate experience may create a set of unrealistic expectations for subsequent assignments abroad.</td>
</tr>
<tr>
<td>Tragedy</td>
<td>The expatriate can provide the organization with insights regarding the environmental constraints within the context of the expatriate assignment. These constraints include those forces within the home organization that inhibit the expatriate's ability to accomplish objectives and those forces within the host culture that restrain individual action.</td>
<td>The expatriate may experience severe feelings of inadequacy as a result of not being able to overcome obstacles. These individuals tend to develop resentment toward the organization for putting them in a situation in which they experience personal defeat.</td>
</tr>
<tr>
<td>Battle</td>
<td>The expatriate develops important strategic abilities to accomplish objectives in hostile contexts. The expatriate is capable of working semi-autonomously in a variety of cultural contexts.</td>
<td>The code of ethics that the expatriate develops may conflict with the legal constraints under which the organization must operate. The expatriate may also override home office mandates due to a sense of obligation to a greater purpose.</td>
</tr>
</tbody>
</table>
assignment abroad as a place to test problem employees, an outpost where the problem individual can’t get into trouble. The assignment abroad may be used by the home organization as a place to force the individual to conform to organizational expectations because the expatriate may not have the support group h/she developed at home. But assignments abroad must be examined by each organization to determine the specific purpose and whether that purpose will lead to the long term goals of the organization. The global marketplace has become too competitive for organizations to continue to consider the assignment abroad as a dumping ground for human resources. The organization must get the most value from its investment in the expatriate by developing human resources while abroad and utilizing that investment upon return.

Several ways that the organization might respond to the subjective experience of the individual expatriate manager became apparent through an analysis of the data. First, the organization can respond by a critical analysis of the elements of the context over which the organization has control. The following are recommendations regarding the context.

The organization must examine the relationship between home country presuppositions, host country
presuppositions and expatriate expectations. How this relationship contributes to individual ambiguity or encourages specific patterns of sense-making should be explored. For instance, if the nature of the job abroad is highly ambiguous or if the nature of the job changes during the course of the assignment and if the individual expatriate is unable to influence the scope and purpose of the work, this situation may comprise the situation specific variables that give rise to the theme of failed dependence. Or if the nature of the job abroad appears to have no relationship to work upon return, then the theme of gamboling may emerge.

An examination of the contextual variables that ultimately result in individual sense-making can help the organization to become more consistent and thoughtful in preparing the individual and the participating organizations for the assignment abroad. Although the organization can become more aware of those factors affecting individual sense-making prior to the departure of the expatriate, the critical learning is that the organization must assist the expatriate in articulating the individual explanations of the experience during the assignment. Individuals within the context of the expatriate need to understand the importance of sense-making. By helping the expatriate to identify personal
patterns within the subjective experience, the expatriate is able to explore the consequences of specific patterns for individual and organizational goals.

Specifically, the organization must provide the individual expatriate manager with organizational support for identifying and analyzing patterns. This support can come in the form of another individual or individuals within the context of the assignment abroad who solicits expatriate stories and listens and helps the expatriate to gain insights into the expatriate's sense-making. This individual must be careful not to superimpose his/her own sense-making or to not be judgmental of specific patterns. By recognizing and validating the expatriate's subjective experience, the expatriate becomes empowered to make choices about the experience and to direct specific consequences.

The support person or persons for the expatriate becomes the "reader" in the literary sense of the word. That is, the support person views the expatriate's narrative as meaningful and reflective of the inner condition of the individual. As such, the narrative becomes allegorical and provides access to the phenomenological, hermeneutic world of the expatriate. But the reader approach to the expatriate makes the process of human resource management much more complex.
It indicates that management of the benefits package is insufficient to adequately respond to the needs of the expatriate abroad. Effective human resource management also involves the ability to read the individual experience for underlying meaning and represent that meaning so that the expatriate can gain insights into his/her own sense-making. This ability requires skills of literary analysis that have yet to be openly valued in contemporary organizations.

Human resource management in the current literature on expatriates has been limited to selection, training (Maisonrouge, 1986; Mendenhall and Oddou, 1986; Tung, 1981), and benefits/compensation (Misa & Fabricatore, 1979; Schein, 1986). This study indicates the need for the organization to expand the existing conceptualizations of human resource management. An expanded view of human resource management would include a total organizational approach to the individual expatriate. Human resource management would not remain limited to a human resource department (usually occupied with benefits administration) nor limited to a training and development department (usually occupied with predeparture training and repatriation) but would become an agenda for all organizational members to play an active role in the development of human potential within
a variety of contexts. This enlarged perspective views human resource management as a continuous, ongoing process that proceeds throughout the assignment abroad and connects the assignment abroad to the total career of the individual within one organization or a series of organizations.

The responsibility for human resource development becomes diffused among relevant members of the organization. This enlarged view requires that each individual within the organization with direct contact with the expatriate be aware of the value of the individual and specifically to be aware of the human experience of being assigned abroad. Responsibility and accountability for the effectiveness of the assignment abroad can not be limited to one person or one organizational unit but to all relevant segments and key individuals. This view is difficult to administer in contemporary organizations because of existing views of accountability and division of tasks. If an assignment abroad "fails," how can we hold the entire organization accountable? And yet, is this not the case in reality? The individual expatriate is at the core of the experience, but situational factors combine to assist or impair individual sense-making and action. The expatriate experience must be embedded in an
organizational context that is sensitive and knowledgeable about the role and purpose of the assignment abroad. Without this perspective, the expatriate, no matter how well-trained initially or well-compensated during the time abroad, cannot hope to become a total resource to the organization.

This enlarged perspective of human resource management also implies a systematic, purposeful approach to the assignment abroad by the organization. But research (Baker and Ivancevich, 1971; Tung, 1988) indicates that this is not the approach taken by most multinationals. The training and development of U.S. expatriates remains generally unsystematic. Before the individual expatriate manager can become effective abroad, the company must have a more encompassing approach to the management of human resources.

Harrison and Hopkins (1967) suggest in their discussion of a proposed alternative to the "University Model" for training Peace Corps Volunteers that the teacher "helps the learner to verbalize his feelings, perceptions, and experiences and to draw conclusions and generalizations from them" (p. 446). This approach of counseling the expatriate may be perceived as more relevant for Peace Corps Volunteers because they are somehow more affected by the cross-cultural experience.
Church (1982) even suggests that adjustment in the cross-cultural setting is less difficult for business people. Less ambiguity, more simple aims, secure financing, greater maturity, greater structure reduce the problems associated with going abroad. The study reported here suggests that this is not wholly the case, and that the expatriate manager could benefit from the training approach proposed by Harrison and Hopkins.

Specifically, the human resource manager can, through an awareness of patterns (theme), assist the expatriate manager to move toward positive rather than negative outcomes of particular themes. Because these themes appear to be central to the individual's view of the world, it is unlikely that they can be changed. But awareness and acceptance of these themes makes it possible for the individual expatriate manager and human resource manager to direct the themes toward the positive development of the individual and organization. Because metaphors are composite frameworks that develop over a series of episodes, perhaps they are best reserved for homecoming conversations. As part of the repatriation process, the expatriate manager could be given descriptions of the four metaphors as a way to discover individual frameworks, changes, or contradictions while abroad. This process could be part of a development
program to establish individual goals and new choices for behavioral patterns.

**Implications for Future Research**

Future research might explore the sense-making and meanings of expatriates managers from areas other than North America. This comparison could explore the relationship of meaning and sense-making to culture and to situation specific variables. Is individual sense-making a product of culture specific values or the immediate environment or the interaction of both? To what extent are the values illustrated in the themes and metaphors culture specific or gender specific?

Future research needs to encourage the documentation of expatriate managers' stories. These stories are vital sources of insight into the dynamics of organizations abroad. The documentation and investigation of stories reflects the central role the individual plays in the character and goals of the organization. The individual becomes an interpreter of experience that involves human emotions and patterns of underlying meaning. These patterns, reflected in the subjective experience of the person, affect individual action and effectiveness and ultimately organizational action and effectiveness. Contemporary organizations must "read" the expatriate's narratives. Narratives are the vital link to the
complexities of the human experience abroad. Without an understanding of these complexities and appropriate responses to these complexities, American organizations will continue to provide superficial support to their managers abroad and minimize our most vital resource - the expatriate manager.

Finally, future research might explore the dimension of time as related to themes and metaphors. Do the themes occur at specific times during the duration of the assignment abroad? Are certain themes more likely to occur at the initial stages or later stages of the assignment abroad? Are the metaphors related to length of time abroad? Is it possible for an expatriate to maintain one metaphor for an entire assignment (i.e. romantic journey)?

Perhaps the most significant contribution of this research to future research lies in Victor Turner's description of the importance of studying metaphors (1974).

I believe it would be an interesting exercise to study the key words and expressions of major conceptual archetypes or foundation metaphors. . . . I would expect these to appear in the work of the exceptionally liminal thinkers - poets, writers, religious prophets - just before outstanding limina of history, major crises of societal change, since such shamanistic figures are possessed by spirits of change before changes become visible in public arenas. The first formulations will be in multivocal symbols and metaphors - each susceptible of many meanings, but with the core meanings linked
analogically to the basic problems of the epoch which may be pictured in biological, or mechanistic, or some other terms - these multivocals will yield to the action of the thought technicians who clear intellectual jungles, and organized systems of univocal concepts and signs will replace them. The change will begin prophetically, "with metaphor, and end, instrumentally, with algebra." (p. 28)

This research has been an adventure into the patterns and metaphors in expatriate managers' storytelling. This study can become the basis for future research that seeks to understand and explain the issues and commonalities of experience that give rise to individual sense-making and result in our image and effectiveness in the global marketplace now and in the future.
APPENDIX A

INTERVIEW QUESTIONS

I. Opening comment

"The purpose of this phase of the research is to understand your experience abroad from your point of view. I will be asking you a few demographic questions and then have you talk more generally about your experience."

II. Demographic information

a. Where were you?
b. How long were you there?
c. How long have you been back?
d. Why did you go abroad?
e. In what capacity were you there?

III. Prompt for storytelling

"Think about the time you were abroad for a moment. Tell me two or three stories that characterize your experience abroad. That is, describe two or three specific instances or events that happened that remain significant to you."

IV. Contextual data

"Some expatriates report different relationships that may or may not have existed for you. Would you describe briefly any of the following relationships from your point of view?

a. you/home office
b. you/referent group
c. you/work
d. you/host culture
e. you/cultural liaison

V. Self characterization

"Describe yourself while abroad. Step back for a moment and describe what [expatriate's first name] is like while abroad."
## APPENDIX B

### EXPATRIATE MANAGER DEMOGRAPHICS

<table>
<thead>
<tr>
<th>ID No.</th>
<th>Sex</th>
<th>Marital Status</th>
<th>No. of Children Stay Abroad</th>
<th>Length of Stay Abroad</th>
<th>Industry</th>
<th>Position</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>M</td>
<td>M</td>
<td>2</td>
<td>20 months</td>
<td>oil production</td>
<td>liaison with research group</td>
<td>London, England</td>
</tr>
<tr>
<td>02</td>
<td>F</td>
<td>S</td>
<td>0</td>
<td>34 months</td>
<td>polymers &amp; aerospace</td>
<td>chemist</td>
<td>Luxembourg, The Netherlands</td>
</tr>
<tr>
<td>03</td>
<td>M</td>
<td>M</td>
<td>*1</td>
<td>30 months</td>
<td>accounts management</td>
<td>auditor</td>
<td>Brussels, Belgium</td>
</tr>
<tr>
<td>04</td>
<td>M</td>
<td>M</td>
<td>*1</td>
<td>24 months</td>
<td>oil production</td>
<td>processing engineer</td>
<td>London, England</td>
</tr>
<tr>
<td>05</td>
<td>M</td>
<td>S</td>
<td>0</td>
<td>15 months</td>
<td>polymers &amp; aerospace</td>
<td>staff engineer</td>
<td>Luxembourg, The Netherlands</td>
</tr>
<tr>
<td>06</td>
<td>M</td>
<td>M</td>
<td>3</td>
<td>48 months</td>
<td>industrial ceramics</td>
<td>operations management</td>
<td>London, England</td>
</tr>
<tr>
<td>07</td>
<td>M</td>
<td><strong>D</strong></td>
<td>*1</td>
<td>36 months</td>
<td>legal</td>
<td>lawyer</td>
<td>Brussels, Belgium</td>
</tr>
<tr>
<td>08</td>
<td>M</td>
<td>M</td>
<td>3</td>
<td>18 months</td>
<td>polymers &amp; aerospace</td>
<td>manager of design group</td>
<td>Luxembourg, The Netherlands</td>
</tr>
<tr>
<td>09</td>
<td>M</td>
<td>M</td>
<td>0</td>
<td>22 months</td>
<td>accounts management</td>
<td>manager</td>
<td>Johannesburg, South Africa</td>
</tr>
<tr>
<td>10</td>
<td>M</td>
<td>M</td>
<td>3</td>
<td>54 months</td>
<td>chemicals</td>
<td>general manager</td>
<td>Brussels, Belgium</td>
</tr>
<tr>
<td>11</td>
<td>M</td>
<td>M</td>
<td>2</td>
<td>24 months</td>
<td>industrial ceramics</td>
<td>operations management</td>
<td>Buenos Aires, Argentina</td>
</tr>
<tr>
<td>12</td>
<td>M</td>
<td>M</td>
<td>5</td>
<td>84 months</td>
<td>electronics</td>
<td>plant manager</td>
<td>Dublin, Ireland</td>
</tr>
<tr>
<td>13</td>
<td>M</td>
<td>M</td>
<td>2</td>
<td>27 months</td>
<td>banking</td>
<td>operations management</td>
<td>London, England</td>
</tr>
<tr>
<td>14</td>
<td>M</td>
<td>M</td>
<td>3</td>
<td>48 months</td>
<td>polymers &amp; aerospace</td>
<td>general manager</td>
<td>Wolverhampton, England</td>
</tr>
<tr>
<td>15</td>
<td>M</td>
<td>M</td>
<td>2</td>
<td>22 months</td>
<td>industrial ceramics</td>
<td>division technical director</td>
<td>Central Mexico</td>
</tr>
</tbody>
</table>

* born abroad  
** divorced abroad
APPENDIX C

CHART OF EXPATRIATE MANAGER CONTEXTUAL COMPONENTS

<table>
<thead>
<tr>
<th>ID No.</th>
<th>Home Office</th>
<th>Referent Group Work</th>
<th>Culture</th>
<th>Cultural Liaison</th>
<th>Self</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>&quot;Out of sight, out of mind&quot; he worked hard to maintain relationship through communication technologies. His group in U.S. was dissolved. Explained that American he was having an &quot;adjustment/covert competitiveness.&quot; He was trying to maintain a &quot;culture&quot; or a &quot;personal relationship.&quot; Home didn't meet his expectations.</td>
<td>Co-workers defined as those in his vicinity who worked on same things. &quot;They just happened to be there.&quot; The relationship was competitive.</td>
<td>At professional level it was good, I took it more seriously than I'd ever taken my work before. The one thing I really knew when I left the house was what I did. Liked work better because society is more respectful of an individual's contribution. He felt taken seriously.</td>
<td>At work, a Brit. who got him acquainted with anyone 01 had to do business with. Felt other guy might have gotten sick of 01, but was too polite to say so.</td>
<td>More tense, wary</td>
</tr>
<tr>
<td>01</td>
<td>&quot;Out of sight, out of mind&quot; he worked hard to maintain relationship through communication technologies. His group in U.S. was dissolved. Explained that American he was having an &quot;adjustment/covert competitiveness.&quot; He was trying to maintain a &quot;culture&quot; or a &quot;personal relationship.&quot; Home didn't meet his expectations.</td>
<td>Co-workers defined as those in his vicinity who worked on same things. &quot;They just happened to be there.&quot; The relationship was competitive.</td>
<td>At professional level it was good, I took it more seriously than I'd ever taken my work before. The one thing I really knew when I left the house was what I did. Liked work better because society is more respectful of an individual's contribution. He felt taken seriously.</td>
<td>At work, a Brit. who got him acquainted with anyone 01 had to do business with. Felt other guy might have gotten sick of 01, but was too polite to say so.</td>
<td>More active-actively crowded out homesickness less open-minded</td>
</tr>
<tr>
<td>01</td>
<td>&quot;Out of sight, out of mind&quot; he worked hard to maintain relationship through communication technologies. His group in U.S. was dissolved. Explained that American he was having an &quot;adjustment/covert competitiveness.&quot; He was trying to maintain a &quot;culture&quot; or a &quot;personal relationship.&quot; Home didn't meet his expectations.</td>
<td>Co-workers defined as those in his vicinity who worked on same things. &quot;They just happened to be there.&quot; The relationship was competitive.</td>
<td>At professional level it was good, I took it more seriously than I'd ever taken my work before. The one thing I really knew when I left the house was what I did. Liked work better because society is more respectful of an individual's contribution. He felt taken seriously.</td>
<td>At work, a Brit. who got him acquainted with anyone 01 had to do business with. Felt other guy might have gotten sick of 01, but was too polite to say so.</td>
<td>Less tolerant of others' opinions.</td>
</tr>
</tbody>
</table>

"...you just sort of tend to draw this little box and just say 'I know who I am, and I'm gonna remain comfortable with that, and nobody's going to tell me anything different.'

"I felt like I had been a child."
APPENDIX D

LITERARY ANALYSIS OF EXPatriate Stories

Harry Stephenson (fictitious name)

London
20 months

Reason for going abroad: Supposedly there was a technical need that Harry could fill. But soon after Harry arrived, he said that upper management decided not to participate in the area of exploration that Harry had been assigned to so Harry's function and technical area was changed.

Harry stated at the end of the interview that he thought his selection to go abroad was an honor, but then he was disappointed to find out that it was just to do a job.

STORY #1

Scene - First day in London
At a hotel in the city
Awakened from 5-6 hours of sleep after the trip from the States

Characters -

Harry - hungry, lost, upset, out of control, tentative, slow, shocked and disoriented (Harry's language)

Harry's wife - He described her as equally disoriented, but he experienced her as being "a little more in tune with what to do next," she was also the first to realize that this place was different - really different!

Plot -

[Graph showing evaluation over time]
Point of view - Told almost exclusively from Harry's perspective. Harry found it very difficult to describe the experience from his wife's point of view. i.e. "I think she was feeling what I was feeling."

Themes:
lost in the woods - adventure (this one has a fairytale quality; that is, a sense of the unreal)
child-like quality (adolescent)
tragedy - hero is defeated at every turn

At first Harry is seemingly defeated by the urban environment of London. But I think Harry really was communicating that he had been defeated by himself. Through some innate character flaw (a lost sense of direction, a failed rational ability to figure "it" out without even knowing what "it" was), Harry in his mind had played the central role in his own nemesis.

crisis in identity - One may begin to question who one is after a perceived defeat by someone or something stronger than oneself, but how shattering to have your very construction of self demolished by one's own perceived inadequacies.

existing frames of reference don't work - reference to not like going across the street to Denny's restaurant.

Failed dependence - can't rely on self, or anyone else for that matter.

STORY #2

Scene - one day and evening
took place on a cricket field at the research center then later on a boat ride
seems to have occurred toward the end of Harry's stay abroad

Characters -

Harry - he plays cricket better than "they" expected
he doesn't feel different than he would have any place else while
he is playing cricket (the "sporting part")
he drives the boat
he is feeling nice
he likes that this is being done for him

Harry's family - they only play a minor role
wife is referred to as being there but is not mentioned again
children are said to have been given mementos by "them" and Harry remembers thinking that that was "nice"
Bob - the other American sent to this area by Harry's company
Bob is at the cricket match and plays on the opposing team
Harry is amused because the organizers of the day have planned
trophies and they assumed that Bob would play better than Harry,
but in the end, Harry gets the trophy intended for Bob because he
plays better

Jay Court - a Brit
he organized the day
Harry gives him a memento for "all the hard work he put into the
day"

Large crowd of Brits who participate and watch but are really not described as
individuals

Plot -

Point of View: Told from Harry's perspective
Others are backdrop for Harry's drama but are also necessary to
validate Harry's feelings

Themes:

centrality of self - Harry is the center around which the action moves
reclaimed potency - driving the boat
performing well at cricket
put others off balance - Harry surprised them with his playing ability
familiarity and similarity - familiarity of sporting environment evoked a familiar response mechanism that confirmed Harry’s image of his competent self through the reactions of others

note that others are necessary to confirm who Harry thinks he is - he doesn’t trust himself to validate who he is

disjunctive self - Harry appears to have separated himself into two identities - the competent self and the unsure self - he looks to others to validate who he is, he is defensive and unsure because of his increasing dependence on others to validate his worth. He has become incomplete by disenfranchising his weak side. He has lost his integrity (his wholeness)

seems to divide the culture into two groups - those who affirm his competent self and those who don’t - unclear how he makes this distinction.

STORY #3

Scene -
first vacation
went to Devon and Cornwall
off season
drove out

Characters -

Harry - tense doing work too, disappointed with accommodations, confusing

Harry’s wife - again not an active part - she was there and was a point of comparison for Harry’s driving ability
He said she was better at driving than he because she had more opportunity

Harry’s children - they enjoyed the sandy beaches because they had never seen them before

Harry’s supervisor - Harry knew he had to go "out there" for some work so Harry’s supervisor suggested that he make a holiday of the trip
Plot:
- Harry has work to do outside of London
- supervisor suggests making it a holiday
- driving is tension-filled
- accommodations not "modern" people are "nice"
- scenic - no people
- kids liked beaches
- evaluated experience as "nice" overall

Point of View:
Again, Harry tells the story from his perspective, doesn't describe other's motivations except in passing.

Note:
At least three elements contribute to Harry's tragedy:
(1) unclear or changing expectations regarding job
(2) no preparation for cultural differences
(3) personal tendency to blame himself for outcomes

Themes:
- getting away from people (referring to the Brits) - Harry comments that it was the off season and there weren't many people around
- escape from complexity - at first I thought the story might not have an underlying meaning - the recounting seemed somewhat aimless and superficial. But upon closer examination, it seems that simplicity is the underlying theme. Harry describes this experience as overall good, but what made the experience good for Harry? He describes the children as enjoying the beaches, but expresses no personal enthusiasm. Perhaps to Harry the experience was memorable and pleasant because he had escaped from the complexity - the need to figure things out, to validate self.
- disconnection - a theme that seems to run through Harry's entire interview is that of disconnection - from his home office, from himself, from his neighbors, from the culture, from his co-workers.
APPENDIX E
EXAMPLE OF PENTADIC AND CLUSTER ANALYSIS

Pentadic analysis

1. Each story and narrative is analyzed for references to each of the following:

   act (names what took place in act or deed)
   scene (the background of the act)
   agent (person or persons who performed the act)
   agency (what means or instruments were used)
   purpose (why the act was done)

2. A determination is made as to which element(s) mentioned above predominates the individual's telling of the story or narrative.

   i.e. An expatriate tells the story of going to an open-air market in Europe. The story is predominated by descriptions of the scene. Although the expatriate mentions who went to the market with him and what he did while there, a large proportion of the story is a vivid description of the scene including sights, sounds and smells. The focus by the expatriate on scene may indicate that the individual is motivation by his senses and engaged by exotic or different encounters.

3. An hypothesis is checked against the substance of the story or narrative. Does the expatriate feel and express being engaged by contextual components that tantalize his senses and offer opportunities for the new and different? Does the expatriate seek out these experiences? If so, the beginnings of a possible theme and/or metaphor begin to emerge.

Because human beings make choices about which elements of the experience they emphasize in the telling, an awareness of these elements and the ratio of occurrence to other elements in a story or narrative is indicative of a particular view of the world.

Cluster analysis

1. Key words or phrases are identified through an analysis of the story and/or narrative. Key words are identified by frequency (mentioned often) or intensity
(tone, volume, or superlative modifiers).

i.e. One expatriate referred to the purpose of his assignment abroad as an opportunity for him to get "international exposure." He stressed that the company thought that this "exposure" was important and that the expatriate agreed. He mentioned this twice in the first moments of the interview, and throughout the interview, he used phrases that referred to his visibility while abroad.

2. The key symbol ("international exposure") is charted to determine other words or phrases that cluster around this key symbol to determine the expatriate's meaning.

    i.e.

    "have a lot of strange looks"

    "recognize that you are different"

    "international exposure"  "you learn a lot about yourself in situations where you stand out"

    "you're different than most people"

    "the minority person"

    "people stare at you for something you consider quite normal"

3. The symbol clusters are then analyzed for the particular meaning for the expatriate. In this case, "international exposure" for the expatriate seemed to be becoming the center of attention. He became highly visible and this forced him to examine who he was as an American and a person.

4. Key symbols and symbol clusters and individual meaning are then checked against other contextual components for the expatriate to determine consistency. Themes and metaphors are then developed.
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