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Expatriate Paradoxes and Cultural Involvement

Abstract: *This exploratory study articulates and describes nine paradoxes inherent in the expatriate experience based on data from a sample of 35 repatriated businesspeople. Factor analysis produced four factors: bridging cultures, self-identity, cautious optimism, and cultural intelligence. They correlated with several measures of cultural involvement, an original concept that refers to the extent to which expatriates enter the foreign culture and work interdependently with host country nationals. This indicates that expatriates who are more involved in the local culture seem more likely to experience paradox. Content analysis described how expatriates handle and resolve paradox.*

The concept of paradox began to surface among management writers in the 1980s. Scholars noted its importance for building theory (Van de Ven 1983), for managing organizations (Peters and Waterman 1982; Quinn 1988; Quinn and Cameron 1988), and for understanding group dynamics (Smith and Berg 1987), organizational change (de Cock and Rickards 1996; Evans 1988<<AU: 1988 or 1989 as in References?>>), and performance (Evans and Mavondo 2002). Osland and Bird (2000) described cultural paradoxes in their attempt to move theory beyond sophisticated stereotyping to more complex characterizations of culture.

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We define paradox as a situation involving the presence of contradictory, mutually exclusive elements that operate equally at the same time (Quinn and Cameron 1988). Although scholars occasionally alluded to paradoxical situations in the expatriate literature, no one studied expatriate paradoxes or attempted to measure this concept empirically until Osland's (1990, 1995) research on expatriation as a transformational process. We suspected that paradox played an important role in expatriation, but there was no evidence indicating whether the degree of involvement with the other culture influenced this role. Therefore, the current study extends Osland's (1990, 1995) work on expatriate paradoxes and also introduces another concept, cultural involvement (CI), to the expatriate literature. Our specific research objectives were to (1) determine whether expatriate businesspeople do, in fact, experience paradoxes and, if so, enumerate them; (2) discover if the experience of paradox is influenced by varying degrees of cultural involvement; (3) learn how expatriates handle paradox; and (4) contribute a richer description of the subjective expatriate experience.

To explicate the paradoxes, the authors utilized grounded-theory method (Glaser and Strauss 1967; Strauss and Corbin 1998), an emergent approach beginning with the researcher's experiences with a phenomenon that is iteratively studied and expanded. The authors first identified nine paradoxes inductively from listening to other expatriates and from their own expatriate experience (11 years primarily in international development work in six different countries in Latin America and West Africa). The next step involved searching the literature for references to expatriate paradox.

Literature review

Prior references to paradox or conflicts in the foreign sojourn literature are limited, anecdotal in nature, and generally dated. They fall into three categories: (1) identification and personal boundaries; (2) relationships with the other culture; and (3) job-related role conflict.

Paradoxes concerning identification and personal boundaries

Gonzalez and Negandhi (1967) were the first to conclude that the lives of U.S. expatriates contain many paradoxes concerning, for example, their sense of identity and personal boundaries. Their subjects identified with host country nationals but worried that their children lacked the opportunity to identify with American culture. Gonzalez and Negandhi (1967) also described the fine line between acting "too American" and "going native" and pointed out that successful accommodation involves losing one's identity.

A basic dilemma for expatriates is determining how much of one's identity (or values) must be relinquished (Bird, Mendenhall, Osland, and Schneider 1999; Sussman 2000) and how much of the other culture's values must be acquired in order to become acculturated (Berry 1983). Our overseas experience and observations led us to expand this theme to include another level of complexity: expatriates relinquish some of their cultural values in order to be accepted or successful in the other culture, but at the same time, some of their core cultural values become even stronger as a result of exposure to another culture. They shed peripheral cultural beliefs and values that are less acceptable to the other culture (e.g., those from the United States reported giving up some of their individualism), which is accompanied by a corresponding adoption of the values of the host culture. For example, Lee and Larwood (1983) found that highly satisfied U.S. managers in Korea adopted some Korean values while retaining U.S. values. To be successful, they hypothesized, these expatriates sought to accommodate those Korean values that did not alienate them from crucial U.S. values. The latter half of this first paradox goes a step further and asserts that core values (e.g., patriotism) become even stronger as expatriates are forced to question and reaffirm them or have the opportunity to observe the results of their absence in another culture.

Expatriates often find themselves expanding their personal boundaries and modifying their identities to take on the role of unofficial goodwill ambassadors for their countries (Gonzalez and Negandhi 1967; Torbiorn 1982). Pool (1965) found that U.S. businessmen who were abroad for many years saw themselves less as representatives of their companies and more as representatives of their countries. Some expatriates instinctively assume the ambassadorial role, because they want other cultures to think well of their home country, despite their private criticisms of it (Gonzalez and Negandhi 1967). In other cases, the host culture forces expatriates to assume this role by questioning them about their homelands and their governments (Osland 1995). In both cases, it is common for expatriates to experience the dilemma of representing the ideal versus the real. A U.S. citizen, for example, may dwell more upon espoused beliefs about equality and equal access to education and jobs—the way things should be ideally—rather than upon incidents of discrimination—the way things sometimes are in reality. Paradoxically, at the same time that expatriates are trying to represent and exemplify the best of their countries, they are becoming more aware of its disadvantages as a result of exposure to another culture and other ways of doing things (Gonzalez and Negandhi 1967). Although the literature on business expatriates refers only to representing one's country, experience led us to believe that the same phenomenon occurs at the organizational

level. For businesspeople, this paradox can be framed as trying to represent your company as best you can in order to succeed but also realizing that the “ideal” values you act out abroad may not exist back at headquarters.

Peter Adler alluded to another paradox involving personal boundaries and orientation when he wrote: “Where the configuration of loyalties and identification is constantly in flux and where boundaries are never secure, multicultural man [and presumably woman] lays himself open to any and all kind of stimuli. In the face of messages which are confusing, contradictory, or overwhelming, the individual is thrown back on his own subjectivity with which he must integrate and sort out what he allows himself to take in” (1974, 373). Thus, at the same time that expatriates are becoming more worldly and assuming a more macro orientation to the world, they are becoming more and more idiosyncratic about how much of that broadened world they will take in and how they make sense of it.

Paradoxes concerning the relationship with the other culture

The second set of paradoxes noted in the literature concerns the expatriate’s relationship with the other culture. Simmel (1950) stated that strangers are, by definition, dualistic, because they represent the unity of nearness and remoteness. Expatriates are both involved and indifferent at the same time, resulting in structural marginality which, if they stay abroad long enough, can extend even to their own culture. Becoming comfortable in other countries often means sacrificing an unconscious sense of fit within one’s own culture. As Adler noted, “multicultural man” is neither part nor totally apart from his culture but lives on the boundary between the two (1974). Nehru stated that: “I have become a queer mixture of the east and the west, out of place everywhere, at home nowhere . . . I am a stranger and alien in the West. I cannot be of it. But in my own country also, sometimes, I have an exile’s feeling” (“Nehru,” 1964, 16). This is the paradox of feeling at ease anywhere but belonging nowhere.

Zajonc (1952) observed that strangers are to some extent expected to conform to the norms of the host culture, but because of their unique role, they enjoy a certain exemption from conformity. This is further proof of their marginality. Cultures allow strangers some latitude that is not proffered to their own members, but every culture has some rules that are absolutes, what Cateora (1983) called “cultural imperatives.” If one fails to discern where the boundaries of the latitude and freedom end, censure or isolation result that limit the stranger’s effectiveness in the workplace. Thus, the expatriate is both free and not free of the other culture’s constraints.

Peter Adler wrote that multicultural man is committed to essential

similarities among people while paradoxically maintaining an equally strong commitment to their differences (1974). In other words, expatriates recognize both the truth that is at the root of cultural stereotypes and the importance of seeing beyond those stereotypes to the individual differences that abound within cultures. Feshback and Weiner (1982) noted that there is more individual variance within cultures than conformity to social customs. In addition, a classic study of 3,641 managers in 14 countries found that differences among individuals within the same country were approximately 2.5 times greater than the differences among countries (Haire, Ghiselli, and Porter 1965, 8). We phrased this paradox as seeing as valid the general stereotype about the other culture but also realizing that many host country nationals do not fit that stereotype.

Paradoxes concerning job-related role conflict

The expatriate paradox that has received the most attention in the literature concerns job-related role conflict in the form of conflicting local and headquarters loyalty (Brooke and Remmers 1970; Shetty 1971; Torbiorn 1982). This is the most common form of role conflict for expatriates. The greater the conflicting expectations, the less committed expatriates feel to both headquarters and the foreign operation and the less responsible they felt for job outcomes (Black, Gregersen, and Mendenhall 1992; Black and Gregersen 1992). Torbiorn (1982) identified several difficulties relating to the expatriate role: (1) unclear or contradictory expectations from both the local office and headquarters; (2) inadequate communication about expatriate behavior; (3) incompatible expectations; and (4) the conflict between expatriates' personal interests, values, and ability and the role others expect them to play. Brooke and Remmers (1970) observed that some companies blame expatriates for local resistance to their directives. In today's terminology, expatriates are "boundary spanners" whose job is to interpret the local company and culture to headquarters and vice versa; they mediate between the host culture and home culture (Thomas 1991, 1994). We phrased this paradox as being caught between the contradictory demands of the headquarters on the one hand and the demands of the host country nationals and the local situation on the other. Because these demands may be contradictory and mutually exclusive at the same time, this aspect of role conflict fits our definition of paradox.

Role conflict is the only expatriate paradox for which the literature touched on practical recommendations. Although Torbiorn (1982) found no general solution, he states that power differences between the two sides or agreement on priorities sometimes simplify decision making. To reach

compromise, expatriates must foresee possible causes of conflict and be able to integrate attitudes and points of view from the two cultures (Shetty 1971). To do so, they must be capable of acting independently of both sides. Brooke and Remmers (1970) found that expatriates judiciously ration the information they pass on to headquarters to protect their own degrees of freedom. To reduce role conflict, Black and Gregersen (1992) suggested educating corporate managers about local realities, working to bring the headquarters and local expectations into alignment, increasing job clarity and discretion, and assigning a corporate sponsor.

Original paradoxes

There were no references in the literature to two other paradoxes inducted from the authors' overseas experience and observations. The first one concerns being both powerful and powerless in one's role as manager. Expatriates often possess a good deal of power as a result of their role at work. This is especially true in cultures characterized by high power distance, whereby managers are expected to be experts who make the decisions. At the same time, however, expatriates are extremely dependent upon subordinates for their knowledge of the local culture, business practices, politics, and key players. No matter how well trained or experienced, expatriates never have all the answers when transferred to a new country. Furthermore, because they are less certain of how subordinates from other cultures think and behave, expatriates sometimes downplay their power to gain employee input, cooperation, and commitment.

The second original paradox relates to a seemingly contradictory approach to people from the other culture: having positive regard for host country nationals while being cautious about being taken advantage of by them. Positive regard, "thinking well of the local culture," was identified as one of the competencies possessed by effective U.S. Information Agency officials working abroad (McClelland and Dailey 1973). A relentlessly negative attitude toward local employees is seldom found in successful expatriates, but they develop caution, the other side of the paradox, in response to a propensity to take advantage of foreigners' ignorance of local practices or their status as an out-group member who is "fair game." Optimism not tempered by caution toward the locals is as counterproductive as unswerving distrust and an unwillingness to perceive the positive virtues of the host country nationals.

The juncture of the literature, despite its limited conceptual understanding of expatriate paradox, with our experiential appreciation of paradox provided enough face validity to warrant testing with subjects the nine paradoxes found in Table 1. In addition to verifying whether expatriates had experienced them,

we also attempted to predict which expatriates were more likely to experience them. Assuming that a certain threshold level of cultural experience and acculturation is necessary to feel the pull of the “foreign” side found in some of these paradoxes, we hypothesized that expatriate involvement with the other culture might influence the perception of paradox. The concept of cultural involvement (CI), developed for this study, was defined as the extent to which expatriates enter the other culture and work interdependently with host country nationals. We tested the following hypothesis:

H1: There will be a positive relationship between the awareness of paradox and the degree of cultural involvement, so that variables indicating high involvement will be positively related to the awareness of paradox.

Methodology

Sample

Because the study (Osland 1990) contained both qualitative and quantitative methodologies, the sample size was limited to 35 returned expatriates. Their names were obtained from the World Trade Council and human resource departments of large multinationals headquartered in Cleveland, Ohio. The subjects met the following selection criteria: (1) a U.S. businessperson, (2) abroad for at least eighteen months, and (3) repatriated within the previous seven years. The subjects represented 16 companies in a wide variety of industries: chemicals, oil and mining, banks, accounting, law, electronics, tires, automotive, and defense. Most (51 percent) worked in services, while 34.3 percent were engaged in sales or manufacturing and 14.3 percent in research. General managers (37 percent) comprised the largest occupational group; other occupations included engineers, chemists, auditors, bankers, accountants, and lawyers. All had undergraduate degrees (e.g., engineering, business, accounting), and approximately half the sample also had graduate degrees (e.g., in business and economics). All but two subjects were male. The age range was twenty-seven to sixty-two with a mean age of 41.2. The average length of time overseas was 3.9 years; with 5.7 percent being career expatriates. This was the first international assignment for 90 percent of the subjects. The majority (63 percent) had been assigned to Europe, but there were also postings in Africa, Asia, and Latin America.

Procedure and analysis

Before the interview, subjects completed a demographic questionnaire that measured the cultural involvement (CI) variables. During the interview, sub-

Table 1
Reported awareness of individual paradoxes, ranked significance, and typical quotations

Paradox factors	Aware- ness	Examples of typical quotations
<i>Cultural-intelligence paradoxes</i>		
1. Seeing as valid the general stereotype about the culture you lived in but also realizing that many host-country nationals do not fit that stereotype	77.1% 6	“You’ve kind of graduated from regarding your experience as being an experience with a foreign people in a foreign culture to being an experience involving a very specific job with a very specific group of people in a neighborhood, in a community . . . The cultural aspects of it, the foreign aspects of it, begin to break down and it becomes more personal.” (Banker in Japan)
2. Possessing a great deal of power but downplaying it in order to gain necessary input and cooperation	68.6% 4	“If you go and force something a little bit here, you have a better feel that it is going to work with the people all the way down to the bottom of the pyramid. But in Europe, you are not sure. You know a couple of levels of how it might work, but you are never sure of how it might touch the bottom . . . or how it might be perceived . . . further down in the organization . . . there you are dealing with different people and cultures. You are not real sure . . . So you really give them a little bit more of a chance to participate in decisions.” (VP, European Operations)
<i>Mediation paradoxes</i>		
3. Being freed from many of your own cultural rules and even from some of the host culture’s norms but not being free at all from certain host-country customs that you must observe in order to be effective	62.9% 8	“You don’t have to be a conformist, whereas at home you do have to play more by those rules, whether you like them or not . . . I can’t find the word for it to save my life, but there is an anonymity that really appeals to me . . . Maybe it’s a big city thing and I suppose I could find that in New York where maybe it is less conformist than here . . . but there is something very appealing to me not to have a label on.” (Accountant in London)

4. Trying to represent your company as best you can in order to succeed but also realizing that the "ideal" values you act out abroad may not exist back at headquarters.	54.3%	9	"I think that you like every customer to feel as though he or she is number one on your list . . . but certainly there are customers who are higher in the pecking order. We are part-owned by American companies . . . and they are paying to be that number one priority. Therefore, all of the European customers that I had . . . abroad come somewhere in the second order." (Geologist, European sales)
5. Feeling caught between contradictory demands of headquarters on the one hand and the host-country nationals and the local situation on the other	51.4%	5	"I proceeded according to the boss [at corporate HQ] and did what he said. Although that was perhaps not the best way to go about it. I would have been more tactful and worked with the local people. When you're there, you begin to appreciate the local problems and you see it's not just black and white. When your boss wants to react in a particular way, it's not necessarily the best way. I didn't have any particular problem with my co-workers. You have to walk that fine line between what the boss and the local people think." (European tax director)
<i>Self-identity paradoxes</i>			
6. Giving up some of your American values in order to be accepted or successful in the other culture while at the same time finding some of your core American values becoming even stronger as a result of exposure to another culture	60.0%	3	"It is maybe outspokenness. You tend to be more reserved in what you say. Probably give up some informality. Americans tend to be very informal at home. And in Europe, you may be a little more formal, even going out to the market. Everybody is dressed a lot better than they are [in the States]. And you tend to say after a while, 'I don't want to stand out that much.' . . . You can pick out an American four miles down the street! Giving up some of your American values, you find that you change in subtle ways—the way you live, the way you act. But at the same time, reinforcing a lot of the values that we have here—the freedom of action, the creativity, the aggressiveness in a good sense that you don't see in a lot of European nationalities." (General Manager in Holland)
7. Becoming more and more "world minded" as a result of exposure to different values and conflicting loyalties, but coming more idiosyncratic as to how you put together your own value system and view on life	48.6%	1	"I have changed as a result of the experience in that I am more understanding of a wide range of people. [I am] Definitely more interested in experiencing different situations and cultures than I was when I went, although that is what drove me to want to do it . . . And, of course, I am much more independent than I was before . . . And probably that idiosyncratic question, I think I have changed in that way, I have sort of created somebody. Not intentionally, I don't think, but I think that is what happened." (Accountant in Venezuela)

Cautious optimism paradoxes

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|---|-------|---|---|
| 8. Generally thinking well of the host-country nationals while at the same time being very savvy about being taken advantage of by them | 54.3% | 7 | “This is especially the case in China. I generally liked the people, but I know they’re out to move ahead faster and they will step on people to get their way. The turnover rate, for instance, in Hong Kong—people skipping from job to job—is incredible Because you were going to pay them a little bit more, but they were only going to stay around long enough until they find the next job to pay them a little bit more.”
(Banker in Hong Kong joint venture) |
| 9. As a result of being abroad a long time, feeling at ease anywhere but belonging nowhere | 45.7% | 2 | “I remember experiencing this paradox when we came back home the first time and realized that we were not really in the mainstream of what people were thinking about and doing We were natives and we lived there and worked there and talked like them but weren’t necessarily feeling like them, part of the community We spent a weekend with a couple that were among our best friends and felt out of it, I guess, because we had evolved in different ways.” (Accountant in Paris) |
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jects (1) answered unstructured and structured questions pertaining to their overseas experiences (see Osland 1990, 1995); (2) completed the awareness of paradox instrument developed for this study; and (3) described a paradox using the critical incident technique (Flanagan 1954).

The awareness of paradox instrument asked subjects, first, whether they had ever experienced the paradoxes in Table 1 (yes/no) and, second, to rank them in order of the significance or importance they held. Afterwards, the interview resumed utilizing the critical-incident methodology (Flanagan 1954). In this widely used qualitative method, subjects choose an incident that is significant to them and then answer a set of open-ended questions that elicits a detailed description. Their answers are content analyzed. In this study, they were asked to “choose the paradox or contradiction which was most significant for you—the one that represented the biggest challenge or discomfort.” After an initial description, they answered these prompt questions: “What led up to the situation? Who was involved? What were you thinking? What were you feeling? What did you actually say? What did you actually do? What was the outcome of the situation? So, then in your own words, the paradox or contradiction you are describing here was what? Did you learn to live with it? How?” The qualitative descriptions of the paradoxes were derived from both their critical incidents and responses to open-ended interview questions about their time abroad.

The demographic questionnaire completed prior to the interviews measured twenty-four CI variables classified as work-related, cultural, and personal. Variables that did not measure presence or absence (e.g., previous international travel, presence of a cultural mentor) were assigned values based on the degree of cultural contact. For example, job types were divided into sales and manufacturing (high contact), service (medium contact), and research (low contact). Work-related variables identified the type and size of facility, organizational phase, reason for the assignment, job type and function, degree of customer contact, and number of direct host-country reports and foreign coworkers. The types of facility included corporate/regional headquarters, country service branch, R&D technical center, and manufacturing plant. The reasons for the assignment included management development, initiation activity, no local management expertise, no local technical expertise, and the need to maintain a foreign presence. Job functions were categorized as technical advisor, trouble shooter, operative, and researcher. Continuous variables were size of facility (ranging from small = 1 to very large = 4), organizational phase, that is, life cycle position (established = 1 and startup = 2) and number of host-country direct reports (0 = 0; 1–5 = 1; 6–11 = 2; 11+ = 4).

Cultural variables focused on the ease of understanding the host culture.

They measured the degree of cultural similarity between the United States and the country of assignment and the presence of a cultural mentor. The operationalization of cultural similarity was based roughly on Torbiorn's (1982) cultural groupings and his finding that people adjust most easily to cultures most similar to their own. In this study, English-speaking countries were placed in the most similar category. The second category consisted of European countries, the third comprised Latin American ones, and the fourth and least similar category included the Asian countries. The second cultural variable measured the presence or absence of cultural mentors, people who explain the local culture to expatriates. Osland (1990) found that expatriates with cultural mentors were more fluent in the local language, reported higher adaptation to work and general living conditions abroad, and had higher performance ratings by both superiors and themselves. Thus, we assumed that the presence of cultural mentors reflected a higher degree of CI.

Personal variables identified both typical demographic data and characteristics that facilitate cultural entry, such as the effort made to learn non-English languages (yes or no), language fluency (low, medium, and high), number of languages spoken, length of time abroad, number of countries lived in, previous international travel, and desire to go abroad (yes, no, ambivalent). Demographic variables measured age at posting, number of children (children's activities sometimes involve parents in the local cultures), company tenure, and occupation.

The interviews were taped, transcribed, and content-analyzed by two coders for common themes. Factor analysis was performed with the paradoxes; all other quantitative analyses made use of Pearson Product Moment correlations.

Results

Reported awareness of paradoxes

The expatriates experienced an average of 5.4 (standard deviation [SD] = 2.06) of the nine explicated paradoxes. The mode was 5.00, and the range was 1–9. The percentages of subjects who reported each paradox ranged from 46 to 77 percent, as shown in Table 1 along with their rankings, although the rankings were not used in the factor analysis. Table 1 also contains typical quotations that describe how the subjects viewed the paradoxes. Thus, the answer to the research question, "Do expatriates experience paradoxes?" was affirmative. Furthermore, the first original paradox, powerless and powerful, was experienced by 68.6 percent of the subjects and ranked fourth in significance among the nine paradoxes tested, while the second original paradox,

positive regard/savvy was experienced by 54.3 percent of the subjects and ranked seventh in significance.

The data were analyzed using a principal component factor analysis procedure with a varimax rotation of factors. It yielded four factors, shown in Table 1, with eigenvalues greater than 1. These factors (named in the parentheses) replicate the categories derived from mentions of expatriate paradoxes in the literature review: (1) identification and personal boundaries (self-identity); (2) relationships with the other culture (cultural intelligence and cautious optimism); and (3) job-related role conflict (mediation).

The first factor accounts for 27.9 percent of the variance and consists of paradoxes 3 (free/not free of norms) (0.63), 4 (ideal/real values) (0.88), and 5 (HQ/national demands) (0.79). Because these paradoxes involve mediation between headquarters and the local subsidiary/market and between cultures, the factor was labeled *Mediation*. It relates to job effectiveness in terms of making the effort to respect host culture norms, be a company ambassador, and get the job done by complying with the headquarters' demands in a culturally acceptable manner or finding a reasonable compromise to conflicting expectations.

The second factor, labeled *Self-Identity*, accounted for 15.5 percent of the variance and is composed of paradoxes 6 (relinquish/strengthen values) (0.87) and 7 (macro/micro perspective) (0.64). It relates to the expatriates' willingness to open themselves to cultural influences and risk being changed in the process.

The third factor, *Cautious Optimism*, accounted for 12.4 percent of the variance and consists of paradoxes 8 (positive regard/caution) (0.86) and 9 (at ease anywhere/belonging nowhere) (-0.47). The latter is negatively loaded, which means that this factor probably does not draw from people who were abroad for a long time. This factor relates to the expatriates' approach to the local people.

The fourth and final factor, *Cultural Intelligence*, accounted for 11.4 percent of the variance and consists of paradoxes 2 (powerful/powerless) (0.62) and 1 (stereotype/individual differences) (0.69). This factor relates to the social acuity necessary to decode behavior and respond with flexibility.

Correlations between cultural involvement variables and paradox factors

Table 2 reveals numerous correlations between the CI variables and individual paradoxes, but, for brevity's sake, we discuss only correlations with factors significant at the < 0.01 or 0.05 level. Our hypothesis was partially supported by the data. All but ten of the twenty-four CI variables were

Table 2
Significant correlations of paradox factors and cultural involvement variables

Work-related variables	Media- tion	Self- identity	Cautious optimism	Cultural intelligence
<i>Type of facility:</i>				
Corporate/regional HQ				0.28 ^c
R&D technical center		0.23 ^c		
Manufacturing		-0.23 ^c		0.24 ^c
Size of facility				-0.41 ^a
Organizational phase		-0.22 ^c		
<i>Reason for assignment</i>				
Initiation activity		-0.41 ^a		0.42 ^a
No local mgt. expertise	-0.27 ^c			
No local technical expertise	0.29 ^b	0.38 ^b		-0.24 ^c
Need to maintain foreign presence			0.36 ^b	
<i>Job type</i>				
Research		0.26 ^c		-0.29 ^b
Sales/manufacturing				0.23 ^c
<i>Job function</i>				
Technical adviser				-0.45 ^a
Trouble shooter			-0.28 ^c	
Operative	0.38 ^b			
Researcher		0.23 ^c	0.24 ^c	-0.32 ^b
<i>Customer contact</i>				
No. of direct host-culture rpts.		-0.25 ^c		0.27 ^c
<i>Cultural and personal variables</i>				
Cultural mentor (absence of)		-0.47 ^a		
Age at posting	-0.29 ^b	-0.49 ^a		
Previous overseas experience	0.23 ^c			0.31 ^b
Number of countries lived in	0.28 ^b			0.34 ^b
Previous international travel		0.25 ^c		
Length of time abroad				0.33 ^b
Language effort		-0.28 ^c		
Language fluency	0.24 ^c			
<i>Occupation</i>				
General manager				0.28 ^c
Engineer/chemist				-0.24 ^c
Banker		0.30 ^b	0.28 ^b	
Lawyer				0.26 ^c
Accountant	-0.27 ^c	-0.29 ^b	-0.32 ^b	-0.53 ^a

Notes: ^a $p < 0.01$; ^b $p < 0.05$; ^c $p < 0.10$; $n = 35$.

significantly related to at least one of the paradoxes at $p < 0.01$ or 0.05 ; of those ten, six were significant at the $p < 0.10$ level. With few exceptions, the correlations were in the predicted direction.

Work-related variables

The mediation factor correlated with both the operative job function ($r = 0.38$; $p < 0.05$; see Table 2 for correlations) and lack of local technical expertise as the reason for the assignment ($r = 0.29$; $p < 0.05$). The self-identity factor correlated positively with the lack of technical expertise as the rationale for the assignment ($r = 0.38$; $p < 0.05$) and negatively with initiation activity ($r = -0.41$; $p < 0.01$) as a reason for the assignment. The cautious optimism factor correlated only with the need to maintain a foreign presence as a reason for the assignment ($r = 0.36$; $p < 0.05$). The cultural intelligence factor had the largest number of significant correlations, correlating positively with customer contact ($r = 0.42$; $p < 0.01$) and initiation activity as the reason for the assignment ($r = 0.42$; $p < 0.01$) and negatively with size of facility ($r = -0.41$; $p < 0.01$), the technical advisor function ($r = -0.45$; $p < 0.01$), research job type ($r = -0.29$; $p < 0.05$), and the researcher job function ($r = -0.32$; $p < 0.05$). Research jobs in this study involved laboratory work in small organizations that involved less supervision of other employees and less contact with host-country nationals.

Two variables had both positive and negative correlations with different factors. Lack of local technical expertise as a reason for the assignment, a category checked by 54 percent of the subjects, was positively correlated with both the mediation and identity values factors but approached significance ($p < 0.10$) in a negative direction with the cultural intelligence category. The negative correlation is explained by the expected intercorrelation ($r = 0.45$; $p < 0.01$) between lack of local technical expertise and the technical advisor job function; technical advisors were the least likely to experience the cultural intelligence paradoxes ($r = -0.45$; $p < 0.01$).

Initiation activity was both positively related to cultural intelligence ($r = 0.42$) and negatively correlated with self-identity ($r = -0.41$). The positive correlation is predictable, because expatriates who set up a new office or program interact to a high degree with the other culture because there is no established program or organization to buffer them. No explanation for the negative correlation comes to mind except that it involves the most abstract of the paradoxes, which may have little significance for a group strongly oriented to entrepreneurial, concrete results.

Cultural and personal variables

The mediation factor correlated positively with the number of countries lived in ($r = 0.28$; $p < 0.05$) and negatively with age at posting ($r = -0.29$; $p < 0.05$), meaning that the expatriates who were older were less likely to experience these paradoxes. Self-identity correlated positively with the presence of a cultural mentor (coded inversely) ($r = -0.47$; $p < 0.01$) and with the banker occupation ($r = 0.30$; $p < 0.05$), but it correlated negatively with age at posting ($r = -0.49$; $p < 0.01$). The cautious optimism factor correlated only with the banker occupation ($r = 0.28$; $p < 0.05$). Cultural intelligence again had the largest number of significant correlations, correlating positively with the number of countries lived in ($r = 0.34$; $p < 0.01$), length of time abroad ($r = 0.33$; $p < 0.05$), and previous international experience ($r = 0.31$; $p < 0.01$). These variables all measure cultural experience, which means that experienced expatriates were more likely to be aware of the cultural-intelligence paradoxes. In contrast, this factor correlates negatively to a strong degree with the accountant occupation ($r = -0.53$; $p < 0.01$).

Qualitative descriptions of expatriate paradoxes

The reactions of the expatriates to the list of paradoxes ranged from polite interest to excitement at discovering a concept they had experienced but never articulated. Typical quotations that describe each paradox in their words, taken from the interviews and critical incidents, appear in Table 1. For more detailed findings on expatriate paradoxes, see Osland (1990, 1995, 2000, 2001).

Handling and resolving paradoxes

Russell (1913) resolved the famous Liar Paradox by framing it as two statements having different levels of reference that are not paradoxical when kept separate. Accepting both truths, reframing, and looking for a higher unifying principle are common ways of dealing with paradox (Quinn 1988; Quinn and Cameron 1988; Smith and Berg 1987). The higher unifying principle utilized by the expatriates was *effectiveness*. The rankings in Table 1 indicate that some paradoxes were more significant than others. All paradoxes were problematic only when first confronted. Once resolved, they no longer constituted an obstacle or required attention. Uncertainty was an element in many of the critical incidents, which may mean that paradoxes are only figural until the uncertainty is resolved. Once they have developed the cognitive maps that include both contradictory truths as well as the cues that

tell them which truth is most closely aligned with effectiveness, expatriates resolve paradoxes by considering the various contingencies present in the specific situation. Descriptions of how they dealt with contingencies and handled paradox were surprisingly similar. The following list resulted from content analysis of their critical incidents:

1. They looked for reasons to explain the situation so they could understand why the other culture behaved as it did in order to understand the “foreign” side of the paradox.
2. They determined what their role was in the particular situation and gauged whether they could influence or change it and whether they had the right, as an expatriate, to do so.
3. They weighed the contingencies of the situation: What would happen if they chose to act on either side of the paradox?
4. They discerned the critical factors (norms or actions) essential for success.
5. They “picked their battles” in headquarters–local conflicts and avoided losing causes.
6. They accepted what they could not change.
7. They learned from the experience and applied it to the next paradoxical situation.

Discussion and implications

This study makes these contributions to the expatriate literature:

1. It articulates expatriate paradoxes and documents their presence as an inherent part of the expatriate experience for this sample.
2. It describes how expatriates handle these paradoxes, highlighting their concern for effectiveness.
3. It reports an initial effort to create a CI index.
4. It provides preliminary evidence that the more expatriates are involved with the other culture, the more likely they are to perceive these paradoxes or contradictions.
5. It creates a language of paradox that can be used in training and coaching.

The findings support the value of taking a grounded-theory approach that detects and articulates phenomena that have meaning for subjects. Expatriates reported awareness of these paradoxes, proving that the concept of expatriate paradoxes is valid and warrants further exploration. The consensus in recommendations for handling paradoxes indicates that they may be useful for training purposes.

Given the study's limited sample size, the link between cultural involvement and the awareness of paradox is less definitive but still promising. The majority of CI variables correlate at various degrees of significance with individual paradoxes and factors in the predicted direction. The significant CI correlations lead to these tentative conclusions:

- More overseas experience, more time abroad, and multiple country postings correlate with mediation and cultural intelligence, but previous international travel has a weaker relationship.
- Expatriates with cultural mentors are more likely to perceive self-identity paradoxes.
- Age may be a factor in perceiving paradoxes or CI, because older expatriates are less likely to perceive mediation and self-identity paradoxes.
- Expatriates involved in initiation activities, which require the cooperation of locals and involve more direct contact with the local culture, report more cultural-intelligence paradoxes but are less focused on self-identity paradoxes.
- Expatriates who deal directly with customers are more likely to report cultural-intelligence paradoxes.
- An effective foreign presence requires a skeptical but positive regard for host-country locals.
- Bankers are more likely to experience paradoxes than researchers, technical advisors, and accountants, whose jobs may demand less social interaction.

Sample size is a major limitation of this study, because having thirty-five subjects was ambitious for the qualitative portion but minimal for the quantitative measures. Factor analysis of the nine paradoxes yielded a ratio of nearly four observations to one variable, which is slightly below the five to one ratio that is normally accepted. Therefore, the factor analyses and the correlation findings must be viewed as exploratory and cannot be generalized to another population without further research. Another limitation might be retrospective recall; although, the repatriates' detailed descriptions of critical incidents and the facility with which they spoke about their overseas experience seem to indicate that the passage of time was not a problem in this study. Their ready recall of these events can be interpreted as further proof of the significance of the expatriate experience and the inherent paradoxes it contains.

Acculturation and cultural sense-making

Acculturation plays a two-faceted role with paradox. A certain threshold level of acculturation and experience was necessary to become aware of the

paradoxes, but even more acculturation was needed to master them or learn to live with them. In Gestalt psychology, the figure in the foreground of an image or situation can switch places with the ground, or the background, according to the viewer's changing perception of their salience. Similarly, the perception of paradox starts out as ground when the expatriate is too much of an intercultural novice to notice its presence, switches to figure when it becomes problematic, and then reconverts to ground when the paradox is resolved. The differing salience (ground to figure to ground) depends on the evolution of the expatriate's level of acculturation. Paradoxes occur abroad because expatriates mediate between two cultures and two organizations with fewer navigational devices and accepted forms of etiquette and norms to guide them. In the shadow of the ubiquitous ambiguity and uncertainty in the expatriate experience, paradoxes represent complexity frozen in time and the inability to index priorities outside one's own culture. They may well be "the muddle" before new sets of contingencies are both accepted and clarified. Knowing which truth to choose in a paradoxical situation relates to both cultural sensitivity and a concern for effectiveness (Osland 1995, 131–132).

An avenue of future research relating to the processual aspect of paradoxes is their relationship with trigger events and sense making, where such events call sense-making behaviors into action. A relevant type of trigger event is termed *discrepancy*—when "acts are in some way frustrated," when there is "an unexpected failure," a "disruption," "a troublesome . . . situation," when there is a significant difference between expectations and reality<<AU: **Where should opening quotation marks be placed?>>" (Louis and Sutton 1991, 60). Discrepancy triggers may first draw attention to paradoxes, taking them from ground-to-figure and leading expatriates to make sense of the paradox. Sense making involves placing stimuli into a framework that enables people "to comprehend, understand, explain, attribute, extrapolate, and predict" (Starbuck and Milliken 1988, 51).**

Osland and Bird's (2000) cultural sense-making model was designed to deal with cultural paradoxes but has been expanded to make sense of general intercultural interactions. It involves framing the situation, making attributions about the people involved, and selecting appropriate scripts from the local culture based on both cultural values and history. This model has also been used to study trigger events in expert interculturalists (Osland and Bird 2001). Future research could determine whether this model and the role of trigger events are relevant to expatriate paradoxes.

This study raises but does not answer the question of whether the awareness of paradox in itself is desirable and related to expatriate adjustment and effectiveness. Future research is needed to answer these questions and

to determine whether there is a causal relationship among these concepts. It would also be interesting to study the logical assumption that awareness of paradox correlates with cognitive complexity, the ability to perceive situations as highly differentiated and to determine how to integrate them (Kelly 1955).

Global leadership and global mindset

Wrestling with paradox and contradiction builds the cognitive complexity associated with global leadership and global mindset (Black, Morrison, and Gregersen 1999; Calori, Johnson, and Sarnin 1994; Gupta and Govindarajan 2002; Levy 2001; McCall and Hollenbeck 2002; Wills and Barham 1994—for a review, see Osland et al. 2006). Dealing with paradox involves managing uncertainty as well as the ability to balance tensions. The HQ/host-country paradox in particular helps expatriates understand the global/local tensions inherent in global business (Bartlett and Ghoshal 1992). Paradoxes force expatriates to perceive more than one truth or mindset, which develops their ability to analyze situations more accurately from various perspectives. This is a key aspect in Maznevski and Lane's definition of global mindset: "the ability to develop and interpret criteria for personal and business performance that are independent from the assumptions of a single country, culture, or context; and to implement those criteria appropriately in different countries, cultures, and contexts" (2004, 172). Levy and her colleagues (1999) operationalized global mindset as cognitive complexity and cosmopolitanism (an enthusiastic appreciation of other cultures)—which may also relate to the awareness of paradox. In addition to helping expatriates learn to read international situations more accurately, paradoxes lead expatriates to develop the behavioral complexity needed to respond appropriately and effectively. In sum, learning to deal with the paradoxes inherent in an international assignment helps expatriates develop the skills needed to be effective global managers and global leaders, and it contributes to the development of a global mindset. This explains, in part, why expatriate assignments were identified as the best method with which to develop global leaders (Black, Morrison, and Gregersen 1999) and how that development occurs (Osland 2001; McCall and Hollenbeck 2002). Future research could examine the relationships among awareness of paradox, cultural involvement, global leadership, and global mindset.

The study contributes a language of paradox and methods for dealing with them that could be used in training and coaching for expatriates, their managers, and human resource professionals. This language could serve as a bridge between expatriates and their U.S. colleagues, so the latter can bet-

ter understand the expatriate experience. While U.S. coworkers often have little patience with expatriates' anecdotes and "war stories" (Osland 1990), they may find the paradoxes interesting, because they contain lessons for effectiveness abroad and for handling paradox at home.

Future research on paradox and cultural involvement

Paradox and cultural involvement, as well as the instruments developed to measure them, merit further development and study. The awareness of paradox instrument appeared to measure what it was supposed to and caused no difficulty for subjects. The factors seem useful in identifying different types of paradoxes, with the exception of the cautious optimism factor that seemed less conceptually sound and correlated with only two CI variables.

We have taken the first steps to create a CI index that, after further development and testing, could be very useful in expatriate and sojourn research. Of the CI variables utilized in this study, only cultural similarity and desire to go abroad did not correlate with awareness of paradox; these items, however, are related to other dependent variables utilized in expatriate research. The concept of cultural involvement enabled us to predict whether subjects would be aware of expatriate paradoxes, albeit with a small sample.

How well integrated and immersed expatriates are with the other culture has been addressed previously only by measuring expatriate adjustment (Black, Mendenhall, and Oddou 1991). There is no expatriate measure of acculturation, although that would be a valuable contribution. The commonly used measure of Black (1988<<AU: Provide reference>>) measures how well expatriates perceive their adjustment to general cultural and everyday life, work roles, and interaction with host-country nationals. In contrast, cultural involvement takes place upstream and impacts how much adjustment is necessary. CI refers to the level of the adjustment and acculturation demands made on expatriates based on the degree of interdependence in their work and their personal predisposition and experience at entering other cultures. Expatriates whose work situation is heavily buffered from the local culture and who make no attempt break out of this cocoon may report a high degree of adjustment, but their adjustment is arguably of a different degree and nature than that of expatriates whose effectiveness at work depends heavily on deep involvement with host-country nationals. Once the concept of cultural involvement is more fully developed, future research could determine its exact role in the expatriation process and provide a richer and more accurate picture of expatriate adjustment and effectiveness.

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