SENSEMAKING IN EXPATRIATION –

AN EXPLORATION

**SENSEMAKING IN EXPATRIATION: een onderzoek naar hoe expatriates
omgaan met het leven en werken in het buitenland.**

Thesis

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For Mum and Dad

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CHAPTER 1 : INTRODUCTION

1.1   BACKGROUND

Contemporary overseas assignments and expatriate experience take place within
turbulent global business environments. These assignments can be crucial for both
internationalising businesses and those already established as global concerns. Over the
last fifteen years the drive to operate in global markets has resulted in heightened interest
in expatriation. A growing body of literature and an international relocation industry feed
the interest and requirements of strategists, human resources personnel, line managers,
expatriates, their partners and families to offer advice and information about expatriation
in all it's guises.

The phenomenon of expatriation exists first and foremost as a reaction to perceived
business need. Its nature and manifestations are highly sensitive to the manner in which
global business is conducted. Articles by Black Mendenhall and Oddou (1991), and by
Brewster and Scullion (1997) demonstrate changes in focus that have arisen partly as
greater understanding of the process of expatriation has emerged.

1.2   RESEARCH QUESTION

 When (1995) this research was first proposed, a limited pool of literature on expatriation
formed an isolated and discrete segment in international business literature. In the earliest
studies of expatriation, expatriate experience was often seen as a step or series of steps in
the progression of an employee through one company. In these studies it was accepted
that the employees' family would fit in with the employers wishes, and that partners
would be unlikely to work. The challenge was to ensure employees and their families
were able to operate effectively and efficiently in foreign situations with local employees
while retaining organisational commitment to their employing organisation. Much of this
research studied the management of international assignments and 'best practice'
procedures. It drew heavily on a theoretical basis of adjustment dating from a time when
international assignments were planned and carried out within a global business climate,

when the costs and benefits of expatriate experience were expressions of investment in an employee over a long term career with a company.

In the 1990's the international business climate changed substantially and research on management strategy investigated sophisticated macro-organisation issues in internationalisation with an emphasis on complexity and uncertainty. In this research there was a shift away from a view of expatriation as a building block of experience for both the individual and the company. Instead it was seen that expatriate experience could be randomly traded in labour markets. Companies or employees offered few guarantees about the future. In these global markets working internationally was now seen as integral to all aspects of business.

Global management practice led to the recognition of the diversity of existing arrangements and the remodelling of contemporary forms of expatriation so that the diversity and uncertainty central to the strategic literature described above became evident and influential in the management of expatriates. Complex expatriate management structures and diverse types of assignment characterise the workforces of organisations operating internationally. In embarking on this research an attempt has been made to address the theoretical tension between operational studies based on adjustment theory and the reality of the complexity and fluidity of global business. The theoretical basis for an individual or family's responses to expatriation should mirror the actuality of the global business environment that creates, moulds and responds to their expatriate experience. This requires a model of expatriation that reflects the many forms of expatriate assignments that exist to meet the volatile reality of global business: (traditional expatriates; locally employed foreigners; people working freelance on contract; split and commuter families etc).

This study attempts to bring some coherence to strategic and operational research by offering and testing a theoretical perspective based on a sensemaking model. The research described in this document maintains that a sensemaking model of expatriation offers an alternative to the linear theoretical models that have been applied to expatriation theory. Already an established theory in the field of management and organisation, mainly through the work of Weick (1995), it suggests that such a theoretical basis would allow a seamless affiliation with latest thinking on macro-organisation issues. Using a

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sensemaking model, the expatriate can be seen to be continually reassessing their circumstances in the face of new experiences. This in turn may lead to their redefining their satisfaction with their current situation and their future requirements and expectations. The simplified model used in this study is given in Figure 1.1.

Such a model allows for complex changes in adjustment and acculturation not just as more information, understanding or ease of living becomes available, but in response to the meaning given to such stimuli by the expatriate. In doing this, this research seeks to move away from a 'pathogenic' model of expatriation where order is the norm and attempts are made to see the experience in terms of success or failure for either the individual or organisation. This research chose instead a salutogenic model where the disorder and complexity of modern business environments is accepted. Expatriate experience is re-framed as an ongoing task of establishing meaningful interpretation.

Fig. 1.1. Sensemaking as a dynamic process in expatriation
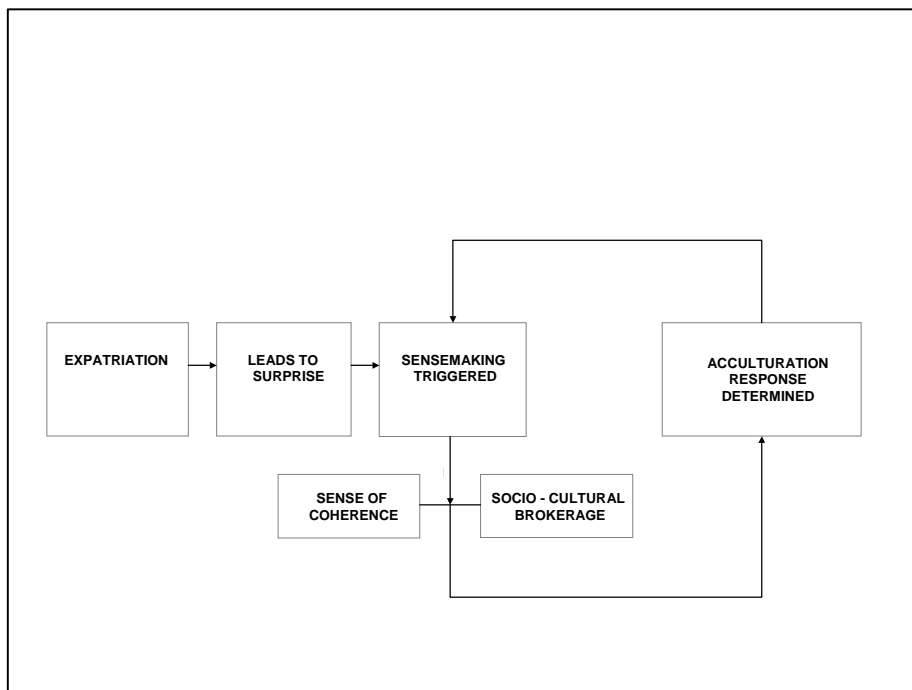
The main objective of the study is to question if, in response to the surprise of expatriate situations, sensemaking elements are related to acculturation responses.

As far as this research is concerned, it is hoped the study can serve to increase understanding of the complex processes in operation when people move countries in

pursuit of their occupation however that expatriate experience is structured. Essentially this research is directed at providing a new theoretical underpinning for use in expatriation studies, which can then be employed in training and development situations. Practically, it is hoped the perspective may be relevant in the assessment of efficient relocation provision.

1.3   THESIS OUTLINE

Chapters 2 to 4 considers literature on the subject of this study, expatriation, literature pertinent to the sensemaking perspective the study adopts, and literature concerning the two sensemaking elements employed in the study, sense of coherence and socio-cultural brokerage.   Chapter 2 reviews the development of expatriation literature, noting the historical influence of prevailing business practice and theory. The review explains how adjustment theories form a theoretical backbone regarding the responses of individuals to expatriation. The study shows how strategic management thought accepts the fluidity of international business environments and this acceptance is not reflected in the adjustment tasks described in operational research. It is suggested that a re-framing of adjustment literature is required. This would help build a coherent theoretical framework to consider how expatriates are able to respond to international business environments where uncertainty and insecurity may be considered 'normal'. This study attempts to review expatriation from the individual expatriate's perspective; adopting a sensemaking perspective to address the problem of how expatriates 'adjust' to insecure and constantly changing circumstances.

The next two Chapters review literature relevant to sensemaking as a new perspective on expatriation. Firstly Chapter 3 provides a detailed discussion of sensemaking and sensemaking properties. It introduces narrative as an instrument of sensemaking method as this is used illustratively in the study, but to avoid confusion with the main quantitative method used in this study, this qualitative method is explained in more detail in the study appendices. The many and varied surprises encountered by expatriates in this fluid and changing expatriate world are noted. The chapter looks at how surprise prompts an individual to make sense of their experiences. Chapter 4 considers literature concerning those elements that aid sensemaking. Two elements are proposed that may influence the

process, Sense of Coherence and Socio-Cultural Brokerage and again literature relevant to these elements is introduced.

The central objective of this research is examined in Chapter 5 when the study asks if, when surprise is encountered in expatriate situations, sensemaking elements are related to acculturation responses. In this study surprise is treated as a result of expatriation, as the independent variable, sensemaking elements as the intermediate variables and acculturation responses as dependent variables. The study looks at what is meant by acculturation responses or 'outcomes' in this chapter. The dynamic process of expatriation is then discussed. A number of hypotheses are framed in Chapter 6 and together these build the conceptual framework of the study.

It was necessary to develop an instrument to measure one of the sensemaking elements, socio-cultural brokerage. The development of this 'brokerage' questionnaire is described in Chapter 7 together with results regarding its reliability and validity. The development of this instrument was aided by a number of organisations and individuals that were selected on the basis of their position in agencies aiding the relocation of expatriates. These organisations together with their broker role are discussed in this Chapter.

This research has depended heavily on the co–operation of the Rotterdam School of Management, particularly the student class of 1999 (intake 1997). Chapter 8 discusses the characteristics of this group, together with how the variables were operationalized, the procedure followed and the statistical analysis used to test hypotheses.

The results of the study are presented in Chapter 9. The first part of the chapter contains descriptive statistics, including scale reliabilities. The second part concentrates on the interrelations of expatriation, sensemaking elements and acculturation responses or 'outcomes'. Thirdly the actual testing of the hypothetical model from Chapter 6 is covered.

Findings and discussion are presented in Chapter 10. Attention will be paid to the practical and theoretical implications of the study, the limitations of the study and the need for further research.

1.5   STORYBASE CONTEXT

Throughout the research reference is made to actual illustrations drawn from academic literature, contemporary media sources and from the author's own story database. The

author is a professional social worker. She has extensive experience in individual, family and group work counselling and is aware of the use of first hand narrative accounts and case study as an effective medium of illumination and change in social work practice (particularly in relation to domestic violence and child abuse). She first became involved in expatriate organisations following her first move abroad to Singapore in 1985. Since then she has had extensive involvement with expatriate organisations on both a professional and volunteer basis. Between1996 – 1999 she was Expatriate Programmes consultant for a Dutch company of professional counsellors and trainers where her responsibilities included the development of manuals, workshops and other practical training sessions for expatriates. Among many other activities within the expatriate community she has sat on the Central Committee of the Unilever Expatriate Network, an organisation that aids the acculturation of employees and families who are new or repatriated to Holland including offering feedback on expatriate policy to company personnel. Currently she is employed as Dean and Quality Manager of a Hospitality College in Switzerland where the student body is drawn almost entirely from Mainland China, India and Vietnam. She also works as consultant for Netexpat, a company providing expatriate partners with the advice and guidance necessary to find suitable occupations during their period of expatriation in a host country.

From her early days within expatriate organisations she has harvested and recorded anecdotes and stories of other expatriates to use in formal and informal individual and group work sessions with other expatriates. To enhance this current research she constructed a story database to preserve these anecdotes and collect other pertinent examples. Financial support for this project was provided by the Foundation for Corporate Education (Stichting Opleidingskunde). Through both personal contacts and her contacts within expatriate circles, she has sought stories and experiences that particularly illustrate the theory contained within this study (Glanz 2003). This qualitative methodology of using narrative in the exploration of sensemaking is explored in the appendices of the study.

CHAPTER 2 : LITERATURE REVIEW- EXPATRIATION

2.1 INTRODUCTION

Expatriation is the starting point for this entire study and this chapter aims to build a framework for the research by mapping and exploring the phenomenon of expatiation by reference to past and current research on the subject. It also attempts to make the case for a fresh theoretical basis that unites current thinking on global business strategy with the realities of individual expatriate experience.

A substantial body of academic research now exists covering various aspects of expatriation. The development of this research records a growing awareness of changing concerns regarding foreign assignments. These changes in focus have arisen partly as a greater understanding of the process of expatriation has emerged, but also in response to societal and business influences. The historical context of expatriate issues in relation to international business is briefly sketched below. Within this literature, adjustment theories form an enduring theoretical spine regarding the responses of individuals to expatriation. It is suggested that this adjustment literature is reframed into a theoretical perspective reflecting experience that requires making sense of rapidly changing, uncertain global business environments.

2.2 EXPATRIATE RESEARCH TO DATE – AN HISTORICAL PERSPECTIVE

The environment of international business is the playing field upon which the expatriate must operate. As business and the environment in which business exists changes, so it can be expected that, sooner or later, this will be reflected in changes in the place and role of the expatriate, and subsequently also in research in this area. In this section expatriate research is set against the background canvas of international business development. Expatriate research addressing modern business environments dates from the 1960's, when trade liberalisation was accompanied by price competition from low wage countries. This was at a time when expatriate experience was represented by those

choosing a long career abroad or taking an individual or series of overseas assignments, all relating to a career within one company. Research at this time started by identifying how individuals responded to new circumstances (Oberg 1960; Gullahorn and Gullahorn1963). Concern with efficiency was expressed by interest in identifying individual characteristics contributing to assignment success (Guthrie and Zenieki 1967). In the 1970's competitiveness was enhanced by attention to quality with consumer preferences becoming more homogenous because of increased travel and communication. The success of especially the Japanese companies internationalising at this time brought with it expatriate literature concerning cross cultural issues especially the transferability of systems and processes across boundaries (Brislin 1981) and dominant international business theory (Perlmutter 1969) conceptualised various forms of international strategy. Expatriation issues explored how selection preparation and acculturation could add value to the performance of an expatriate employee. (Baker and Ivancevich 1971; Triandis Malpass and Davidson 1973; Tung 1981; Torbiorn 1982; Abe and Wiseman 1983).

By the 1980's increased internationalisation was perceived as a threat in some host countries, which was accompanied by a return of trade barriers. The drive to stay competitive was matched in labour markets by a more away from job security for individual employees within a single company, and a more insecure and sceptical labour force. Expatriation research reflected the increase in trade barriers by turning its attention to issues of repatriation. (Adler1981; Black, Gregersen and Mendenhall, 1992). Organisational commitment was investigated (Luthans, McCaul and Dodd, 1985) and the mobility of employees in general grew into a major area of research. Diversity and flexibility were evidenced in concerns about the wider setting and context of expatriate experience. In this family factors were identified as crucial to the progress of assignments (Harvey 1985; Coyle 1986; Briody and Chrisman 1991; Black and Gregersen 1991) and the first attention was given to women managers (Adler 1984); International business theory concentrated on structure and strategy of organisations, in relation to their environments as evidenced by the work of Bartlett and Ghoshal (1989).

By the 1990's technological developments facilitated a tailoring of products to unique and local markets. The importance of responsiveness to local conditions gained prominence especially in terms of delivery of large choice and short lead times.

Knowledge management concerns were investigated in relation to the retention of skills and international expertise in a less stable workforce (Forster 1994). Further changes in career pathing meant that issues regarding employee mobility and recruitment became prominent (Brett, Stoh and Reilly 1992; Forster1992; Suutari and Brewster 1998), especially in relation to the changing position of women in the workforce (Harris 1999; Linehan 2000). Dual career issues arose prominently in expatriate literature (Smith 1996; Harvey, Buckley, Novicevic and Wiese 1999; Glanz and van der Sluis 2000) with dual incomes providing both greater family security and opportunity. The need for local responsiveness combined with a closer review of expatriate costs led to the relationship between expatriates and locals being investigated (Hailey 1999) together with the structuring of overseas assignments in general (Mayrhofer and Brewster 1996), and a closer investigation of cross cultural values and rewards (Sparrow 1999; Bradley, Hendry and Perkins1999).

The five years at the end of the millennium saw a shift in gear to an even higher level of uncertainty in business. By the mid 1990's concepts of uncertainty and unpredictability in the conduct of global business reflecting the flexibility and innovation seen in the marketplace were also displayed in international management theory. Doz and Prahalad's (1986) ideas where the overall balance or fit is more important than deterministic relationships between international management variables have now become widespread. This is also reflected in the recognition of differential structuring of expatriate assignment (Harris, Petrovic and Brewster 2001) and a great deal of expatriate literature now attempts to describe and track the types and construction of assignments currently in operation. The acknowledgement of diverse existing ways of structuring expatriate assignments has led to the questioning of the familiar concept of the expatriate employee (Tayeb 1999; Forster 2000). Since 2001, issues of corporate governance, risk management and cost control have been accompanied in expatriate thinking by considerations of reducing relocation programme costs, focusing especially on relocation policy and its components, and 'commuter' assignments - usually involving the employee working abroad during the week and returning home at weekends (Harris, Petrovic and Brewster 2001).

2.3 ADJUSTMENT MODELS IN EXPATRIATION LITERATURE

Throughout the research above, when attention is turned to the responses of individual expatriates, the most enduring concept in expatriate literature concerns the course of the adaptation of people to their new environment. Adjustment models represent the most coherent attempts to date to establish how individual expatriates respond to the experience. An understanding of the contribution of these models to the body of expatriate research is important to this study.

Lysgaard (1955) was one of the first to suggest that people living abroad pass through a series of stages of adjustment or well being that takes the graphic form of a U-curve. According to this view, people tend to start off their time abroad in good condition. Their well being may even increase a little with entry into a new culture. Later, as they come to grips with the foreign culture their sense of well-being declines. Then, as they learn to cope, they come to feel better about themselves and the world around them.

Fig. 2.1: The U- Curve of Cross- Cultural Adjustment or ' Culture Shock' Curve – from Oberg (1960)

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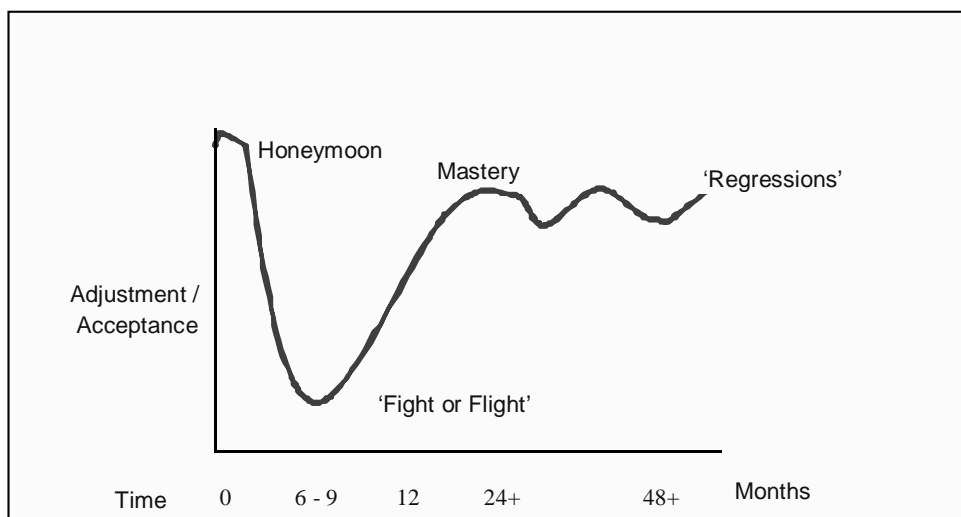
Oberg (1960) offered a well-known version of this hypothesis in his discussion of culture shock (Fig.2.1). According to him, people abroad pass through four stages, beginning with a Honeymoon Stage, and after periods of Crisis and Recovery, ending with a time of Adjustment when the expatriate functions with only a minimum of strain. The U-curve has been extended by Gullahorn and Gullahorn (1963) into a W to cover the period of re-entry at home, at which time, people are supposed to recapitulate, more or less, the course of their adjustment abroad. While the form and progress of the U shaped curve itself has come under scrutiny as being too generalised (Furnham and Bochner 1986), and conflicting with empirical evidence, (Torbiorn 1982; Black and Mendenhall 1991; Selmer et al 1997) the general pattern of incremental adjustment retains strong support. Marris (1980) suggested that the cause of relocation stress is the disruption to people's structure of meaning and the conceptual organisation of their physical and social surroundings. People build up a repertoire of experiences with their surroundings that enables them to solve problems and cope with change. Structures of meaning may be highly specific, as they are embodied in unique emotional attachments and commitments to persons and places. For Marris uprooting produced emotional stress by disrupting this structure of meaning. Marris then moved on to describe relocation as meaning the loss and bereavement of relationships. He suggested that the loss of a neighbourhood or of a way of life interrupts the continuity of the structure of meaning in the same way as the death of a loved one, and that relocation can lead to grief and mourning. This concept of loss is a subtle and enduring assumption behind a great deal of adjustment literature. Over time, theoretical bases of uncertainty reduction (Black Mendenhall and Oddou 1991; Brett 1980) grief (Marris 1980) or social learning (Black and Mendenhall 1990) have been developed. These theories suggest increasing an expatriate's control over, knowledge about or reconciliation to the surrounding cultural environment leads to enhanced acceptance and comfort on overseas assignments. In turn this leads to heightened cultural interaction. Such studies of expatriation attempt to measure an individual's incremental adjustment to the general environment or culture of the foreign assignment by relying on an agreed norm of 'healthy' adjustment as portrayed by De Cieri, Dowling and Taylor (1994) in Fig.2.2 and based on measures of self esteem, social support, satisfaction with life and satisfaction with family relationships. One difficulty

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with most studies considering expatriation is that they examine the phenomenon of expatriation with no reference to a control group of non-expatriates. It is of course also quite possible that executives may proceed through similar adjustment processes when they move domestically within their own home country.

Fig 2.2: Psychological Adjustment Phases De Cieri, Dowling and Taylor (1994) adapted from Harris and Moran (1979)
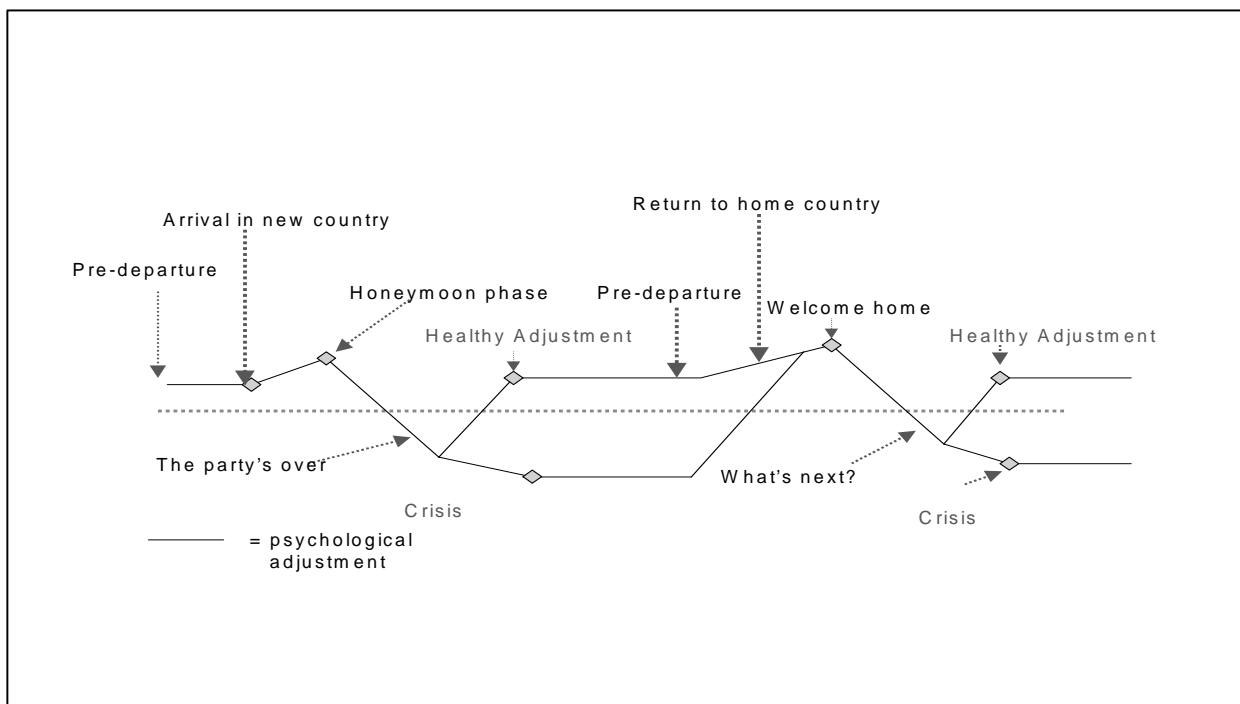
The contribution by Church (1982) discussed whether cultural adjustment models were universally applicable. Subsequent studies have acknowledged that relocation and expatriation involve other adjustment tasks regarding work and organisational responsibilities, family dimensions and task and role definitions. Problems of adjustment associated with attention given to expatriate 'failure' rates first suggested by Tung (1981) and Mendenhall and Oddou (1985) were quoted widely until being questioned particularly by Harzing (1995) and Forster (1995). By and large, the assumption remains that increasing cultural interaction is a desirable and achievable goal both by the individual and responsible organisations. Equally the view that inter-cultural interaction is a reliable measure of satisfaction in an overseas assignment is rarely challenged. It is

often included in studies as a variable against which to compare other dimensions, and in other studies as a measure of (desirable) outcome purporting to measure the 'success' of an expatriate assignment. A notable exception is Janssens (1995) paper 'Intercultural Interaction: A burden on international managers?' When examining the applicability of cultural distance with respect to intercultural interaction, she noted Belgian and British managers showed a lower degree of intercultural interaction than their colleagues in Asia or N. America, relying on their not-too-distant social network at home, and making less effort to integrate. "This result indicates that actions that are motivated to reduce uncertainty and gain control are not necessarily directed toward adjustment behaviour that focuses on integration into the new environment." (1995:160)

In exploring this further, an Australian expatriate living in Switzerland talks about the complexity of 'the immersion process'. "People from similar cultures and backgrounds like to stick with the familiar. They like to talk to each other and share experiences. They like to grow into their new country. They tend to group together… How many of us when visiting China Town, Little Italy, Little Greece or any of these other communities consider them as dysfunctional?" (SD1: 2000).

Aside from taking comfort in the familiar, literature in the form of relocation handbooks sometimes gives an indication of potential difficulties with straightforward attempts at adjustment. " Before asking yourself whether on not you want to mix (with locals) you need to ask something else: Do you have a choice? Of course you will go out there thinking it is the natural thing to get to know the inhabitants of your new country. Then you find that the culture tells a different story, and the locals do not in fact wish to mix with you, a foreigner, or as in the case of certain regimes, may not mix." (Meyer 1996). Flokowski and Fogel (1999) have investigated this aspect of expatriation and have considered how such host ethnocentrism might affect work adjustment and commitment to the host unit.

Increasingly all these issues have led to cross-cultural adaptation being seen as a multi-dimensional phenomenon (Haselberger 2004) that provides a useful grounding for research into operational issues in the management of expatriates.

Operational studies consider the way organisations manage their pool of international assignees and provide the basis for recommended practice procedures (Coyle and

Shortland 1992; Tung 1981; Forster and Johnsen 1996; Fukuda and Chu 1994; Selmer, Torbiorn and de Leon 1998; Furnham and Bochner 1986; Black, Mendenhall and Oddou in 1991; Brewster and Scullion 1997). Research into the management of expatriates acknowledges that expatriates are dealing with increasingly uncertain environments, but retain a theoretical basis that prizes integration and adjustment for individual expatriates as goals. The adjustment models underlying these studies emphasise integration and certainty. For example, Mendenhall, Punnett and Ricks (1995:413) summarise the culture shock cycle as follows: " to reduce the stress and anxiety of culture shock and increase international adjustment, an expatriate must learn the host culture's social rules, and the reason why these exist within that culture. As this increases, so does the level of adjustment to the host culture. And as the adjustment increases, the expatriate's productivity and quality of life increase as well". It is difficult to divorce the prevalence of such models (Oberg 1960; Harris and Moran 1991; Clackworthy 1996) from traditional forms of expatriation, i.e. the sponsored limited term assignment. Expatriate studies utilising 'adjustment' models have been carried out with an underlying assumption that an expatriate will be carrying out duties with a view to using learned skills, both technical and social for the benefit of a company where he or she will continue to work and live. Many Human Resource programmes are also geared to this goal for staff development. However "Companies are not providing security, ergo employees cannot be expected to provide loyalty." (Lanto 1993). As corporate structures have changed over time, people may now be prepared to move sideways within and between companies as they search for alternative awards and reinforcement to standard hierarchical career progress (Syrett and Lammiman 1993). This has implications for expatriate research that has drawn on the costs and benefits of expatriation as an expression of investment in an employee over a long-term career with a company.

2.4 ADJUSTMENT IN UNCERTAIN GLOBAL BUSINESS ENVIRONMENTS

While adjustment models have contributed significantly to the study of expatriation issues, they do not have such a central position in general theories of international business. In fact, if the historical development of expatriation research within

international business literature is considered it can be seen that contemporary research into expatriation is covered differently in strategic and operational research. It appears at times as though these two types of research address very different global business realities.

Strategic research addresses macro-organisation issues in internationalisation with an emphasis on the management of knowledge, structure and resources in the face of uncertainty. (e.g. Perlmutter 1969, Doz and Prahalad (1986); Bartlett and Ghoshal 1989; Mayrhofer and Brewster 1996). This is the perhaps inevitable consequence of more and more global organisations being forced to cope with less stable environments. Paauwe Williams and Keegan (1998) cite these changes as being a product of intensified competition, reductions in product and service life cycles, increasing technological advancement, rapid development in information systems and increasingly complex client and consumer demands. These all source and impact international management strategy. Harzing (1999) provides a review of literature in this cluster. She suggests " Companies following a transnational strategy recognise that they should pay attention to global efficiency, national responsiveness and world-wide learning at the same time. In order to do this their strategy is (literally) to have no set strategy, but to let each strategic decision depend on specific developments. Strategy becomes unclear and it may become dissolved into a set of incremental decisions with a pattern which may only make sense after the fact." (1999:40) Studies in the macro-organisation area acknowledge the modern mercurial nature of global business environments and regard this situation as being the basis for business opportunity. 'There is not one future but hundreds…Getting to the future first is not just about outrunning competitors bent on reaching the same prize. It is also about having one's own view of what the prize is." (Prahalad and Hamel, 1994:9). Such literature encourages players in the field to develop an understanding of the flexibility required in addressing multiple views of the future.

Employees in global organisations have to be considered as dynamic actors in the employment market where managers see the need to manage their career on an individual basis (Mirvis and Hall 1994, Weick and Belinger 1989). Bennett (1993) suggests that when going abroad, the majority of expatriates expect the effect of this to be positive professionally. However, on re - entry the picture might well be different, with, for

example only 26 % of employees gaining promotion on return in a study of 135 repatriated employees representing 5 US companies (Oddou and Mendenhall 1991:26). An Arthur Anderson report (1999) surveying 70 companies employing some 21,000 expatriates suggested more than one fifth of companies said they expected people to find themselves a new position before they returned, with only half the companies surveyed guaranteeing a position when the expatriate returned. Where the individual is encouraged to be responsible for their own career development, and where an employing organisation is able to offer only limited opportunities on repatriation, these figures may represent both individual and organisational reassessment of changed circumstances subsequent to or consequent on their expatriate assignment. Research on Finnish repatriates suggests that expatriates and repatriates may be particularly active in managing their own careers: 'Despite the positive career outcomes, 59% of those who have stayed with the same employer had seriously considered leaving. This may reflect the good external job market situation of repatriates, as will be pointed out later. In total about one third of the repatriate group had changed their employer. From those, one third had done so while they were still abroad (on average four months before repatriation). The timing indicates that they had changed the employer earlier than the average repatriation job negotiations started. The majority of the repatriates who had changed jobs had taken a look at the possibilities with the same employer; and had left on average 18 months after the repatriation. In other words they gave themselves good time to see the alternatives on offer with their previous employer, and then left.' (Suutari and Brewster 2001:11)

In their study, Forster and Johnsen (1995) said companies reported employees asking for written guarantees about employment before taking up employment overseas. Companies do not feel able to offer such guarantees and say they lose some staff as a result of employees expectations of reward for overseas placement not being met (Scullion 1993). This individual assessment of the value of expatriate placement in a career has implications for mobility. Expatriates are portrayed as an expensive human resource, potentially difficult to move, particularly to certain locations. In the 1995 Amrop - Harvard survey (Ely and McCormick 1995) of senior international executives, less than 50% of companies said they were successful in filling posts for international executives

in their organisations. This survey found the greatest shortfall in recruitment arose in Southeast Asia, China and Eastern Europe.

These last 3 locations represented areas of the world where there appeared to be a sudden and widespread demand for expatriates to meet developing markets, at least in the short term. Whether this demand represents a real increase in numbers of employees asked to work abroad on a world-wide basis, is unknown. It has been taken for granted that the globalisation of world markets has led to more people taking up overseas assignments, but this is uncertain, given the lack of good, reliable data. Evidence from one survey (PriceWaterhouseCoopers 2000) suggests the pattern of expatriate employment has changed from long term to short term contracts and placement. Recent research surveying 65 HR managers of mainly medium to large multinational enterprises looked at long- and short- term assignments, international commuting and frequent flyers. 'The survey found that organisations appeared to be making increasing use of all four types of international assignment.' (Harris, Petrovic and Brewster 2001:7). The actual numbers of people working outside of their own country is unknown, a fact acknowledged by Brewster and Scullion (1997). Even establishing this on a national basis is very difficult, because of problems with definition. Existing definitions of expatriation in the business environment tend to refer to individual International Executives. Definitions of expatriates as 'employees assigned to live and work in a foreign country for a period of time (not permanently)'(Pricewaterhouse Coopers 1999:iv) have become usual in studies legitimately concerned with the premium paid for such 'added value' employees. Such definitions exclude large numbers of people e.g. locally recruited foreigners, who would also define themselves as 'expatriate' but have not been 'assigned' to a foreign country, or who may not expect to return. Earlier studies of expatriation define the term more broadly. Cohen (1977) for example defined the term as 'those voluntary temporary migrants, mostly from affluent countries who reside abroad for …business- private entrepreneurs, representatives, managers and employees of foreign and multinational firms, foreign employees of local firms professionals practising abroad'. While it would now be unsafe to suggest such people are drawn 'mainly from affluent countries', a definition, which acknowledges the business interest of an organisation or the career

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interests of individuals, may be more appropriate. 'Expatriate' may be more safely defined as ' people and families who move internationally in pursuit of their occupation'. Of these the experience of 'global nomads' i.e. a global workforce of employees and families who may spend a large part of their working lives moving from one posting to another, rarely staying in one location long enough to put down roots, but no longer feeling part of their home culture', in managing moves and spanning cultures has provided a rich source of information on living and working abroad. This has invited a concentration of research on characteristics of global nomads especially in research on selection and development that has become generalised as suitable for all expatriates. Such generalisation should be treated with care, as it is only recently that research has started to recognise the complexity of this field. It is likely that expatriation has always existed in many guises but that expatriates other than those described above have been hidden and not easily accessible for research and assessment. Some very recent literature both recognises this and is moving away from a narrow examination of expatriate experience in isolation (Harris, Petrovic and Brewster 2001). Businesses employ dual career couples, locally employed foreigners, people working freelance on contract with special ties to particular companies, split and commuter families etc. An expatriate employee may have to relocate only to find the bulk of their responsibility lies elsewhere involving widespread travel. The tasks and responsibilities of expatriates change as do working structures. This is particularly noted by Bonache and Fernandez (1998) who found heavy emphasis in business literature on team-based structures that contrasted with a heavily individualistic trend in standard expatriate literature. Structures for hiring and developing expatriates change according to circumstances as does the relationship between expatriates and locals (Hailey 1998) The practice of recruiting employees who have an international upbringing and outlook specifically to fill certain international postings challenges the traditional concept of a 'home country ' (Soloman 1994). Extended assignments, promotion abroad and movements to a new location overseas can mean assignment duration is can vary dramatically from initial proposals. Previously agreed lengths of expatriate placement are 'not always honoured' (Shiraki /Japan Institute of Labour 1996). In fact, in a study of Japanese subsidiaries in Hong Kong and Taiwan Fukuda and Chu (1994) found the duration of overseas assignments were fixed in only

about half of cases in their study. Group moves and unit transfers are commonplace, bringing their own special requirements and literature.

Contemporary management of expatriates struggles with attempts to bring coherence to complex and changing business requirements. A wide array of in-house and outsourced provision now exist purporting to support overseas assignments, either through cross-cultural training, tax, legal and financial advice, relocation support, career development provision, remuneration strategy and online support systems. Recognition of the diversity in types of expatriate has not always been welcomed by organisations struggling to standardise provision and bring coherence to organisational planning. In this way such changes may be seen as threatening by some, but an opportunity to create and review by others. Douglas' (1978) thinking is relevant to this: 'though we seek to create order, we do not simply condemn disorder. We recognise that it is destructive to existing patterns: also that it has potentiality. It symbolises both danger and power." The driving forces in the creative management of expatriation appear to arise from the perceived need to accommodate the ever-increasing people and assignments which do not fit 'standard' expatriate profiles and circumstances.

In today's global economy expatriation may be inconsistent with what might be termed linear adjustment. The concept of future unpredictability is not directly addressed in studies that retain ideals of expatriate assignment 'terms', assignment cycles, 'home' companies and tour completion'. Recent research concentrates on what adjustment actually means in terms of employees' attitudes and contributions on assignment e.g. expatriates may need to function in a variety of multiple nationality teams where the form and type of interaction may not be constant (e.g. Berger 1996). Brewster (1998) has considered the paradox of adjustment in relation to the ability to transmit new fresh ideas after a period of time away from the organisational centre.

Potential adjustment to a particular cultural environment both from individual or corporate point of view can no longer be seen as an 'end result' but rather has to be seen in the context of adjustment to potentially changing alternative futures.

2.7   IMPLICATIONS FOR THEORY

The start of this Chapter saw how past expatriate research has reflected changing international business environments. Contemporary global environments are now seen to be subject to great, rapid and diverse change. International business literature and theory has moved to accommodate these unstable environments. Expatriation studies need to address how expatriates make sense of their situations in a global economy where disorder is the norm and any adjustment tasks are carried out in the face of uncertainty. The understanding gained from the theoretical basis of past acculturation studies needs to be re-framed in this light. Previously the task for expatriates was seen to have been to adjust within the framework of a stable career path to the cultural differences challenged by individual postings. Now, with a recognition of the variety of long and short term assignments presented within a changing career landscape, adjustment to cultural differences may be less important than just making sense of what is happening so that the expatriate can operate in these changed circumstances. For example, the speed and frequency of some expatriate assignments precludes the possibility of measured cultural adjustment for some expatriates. It is once more time to focus on individual expatriates and their families, who with more or less support from employing organisations have to meet the daily demands of the multi-dimensional nature of expatriation. Despite all the research on selection, training, adjustment, performance measurement and repatriation, still comparatively little is known of how present day expatriates make sense of their experiences in these volatile business environments. The time has come to seek an alternative paradigm to investigate how expatriates and their families respond to these environments, and this study suggests that sensemaking theory may prove an interesting approach.

CHAPTER 3 : A SENSEMAKING PERSPECTIVE: AN OVERVIEW AND RELATED LITERATURE

3.1   INTRODUCTION

The experience of expatriation has been explored and it has been explained that expatriation research has previously been based mainly in adjustment theory. This chapter now introduces sensemaking as concept that could aid understanding of expatriate experience under the conditions of uncertainty in global business environments that have been outlined in the previous chapter. This is the first of two Chapters outlining the literature pertinent to the theoretical basis of sensemaking. This Chapter offers an overview of Sensemaking theory. The concept and properties of sensemaking of sensemaking in expatriation are illustrated by the use of narratives, and the way in which sensemaking is triggered by surprise is also investigated.

3.2   THE CONCEPT OF SENSEMAKING

Making sense of situations is an understandable concept in everyday speech, but taken literally as "making something sensible" Weick (1995:16) it has become a well established theoretical tool in organisation studies (Gioia and Chittipeddi 1991) especially considering strategic responses to chaotic and complex environments (Schneider 1992; Lissack, Roos, and Petzinger. 2000) and crises Weick (1996). Sensemaking theory applied to organisations starts from an internal process and individual experience. Weick (1995) suggests academics that study sensemaking define it in a number of different ways, but all studies involve the consideration of how active agents 'structure the unknown' (Waterman 1990). For Weick, this process is first anchored in beliefs or actions and then connects the two, beginning with whichever is clearer. The outcome of such a process is a unit of meaning i.e. two connected elements. "Sensemaking is an effort to tie beliefs and actions more closely together as when arguments lead to consensus on action, clarified expectations pave the way for confirming actions, committed actions uncover acceptable justifications for their

occurrence, or bold actions simplify the world and make it clearer what is going on and what it means." (Weick 1995:135).

Sensemaking, then, is the process that occurs when an individual uses rational, conscious means to sort out confusion arising in novel situations. Sensemaking theorists consider that human beings act on the basis of programmed scripts. In new situations, especially when meeting circumstances that appear similar to an individual's previous experience, they draw on those scripts as a resource to determine action. On occasion, a new situation will not conform to their programmed scripts based on past experience, resulting in unmet expectations– a confusion between past and present understanding. This is what is called surprise. Sensemaking is the process whereby use conscious rational thought is used to re-analyse and bring order to this confusion and surprise. This seems to be a concept that provides a workable framework for studying the uncertainty and unstable environments encountered in international expatriate experience.

3.3 THE USE OF NARRATIVES TO ILLUSTRATE SENSEMAKING

Before fully exploring the concept of sensemaking, a central instrument of sensemaking: storytelling and narrative is introduced here to aid this study's account of sensemaking in expatriation. Narrative is not the major method of research in this study, but nevertheless the collection of narratives in the study follow established research method. An overview of this method is given in Appendix 10.

It is accepted while such narratives may be appropriate tools for mapping the fluidity of sensemaking, they are theoretically biased and that others may make alternative sense of these stories and interpret them differently. Indeed, several examples are drawn from existing 'adjustment' literature. This differential interpretation is consistent with narrative theory. Peltonen acknowledges it is "appropriate to assume many competing versions of the 'same' factual development in a persons talk and situationally varying combinations of those meaning structures." (1998:878). More than with other approaches, subjective, heterogeneous interpretations of texts are considered the norm.

This is entirely consistent with how expatriates facing overseas assignments and gathering information will make individual assessments of what such information

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represents to them. As an attempt to illustrate this, the online diary posting below from Thailand is included to consider what it might mean to expatriates facing a move there:

' 12:11pm Nov 1, 2000. We are being battered by a storm that is the result of a typhoon in Taiwan. Winds are ripping coconuts and fronds off the trees, it is dangerous to go outside or it is possible to get bashed with a coconut....wow...I never was in such a storm. I come from tornado country but the sea is a new arena for me. The sea is at our balcony already. The bungalow is being put to the test, the tiles are holding. We expect to lose electricity very soon. The beach is gone.

We are getting blasted from the sea by high winds and waves. The sea is iron-grey fury, and the waves are at our feet. The tide has hit the sea wall and our balcony ends half a meter away. It is wonderful and full of fury. Cool air (about 85F). We get our weather news online since there is no local newspaper and the Bangkok Time comes a day late. ………SO we check the weather online, knowing that we'd be the last to know we were being blasted by a typhoon if one was anticipated' (Heine 2000)

It is impossible to estimate accurately the effect of such a reported experience on a potential expatriate to the same region. The effect could range from an immediate decision to withdraw from candidature for such a posting to one of enthusiasm for the potential challenges ahead. And yet powerful images of this sort of this sort help develop and mould views and expectations of the life they will be living abroad when people are making decisions about overseas postings.

It was felt qualitative data in the form of expatriate anecdotes and stories would substantially illustrate and enhance the main quantitative research project. Rooting the theory in real expatriate experience was felt to be crucial, and narrative method is an appropriate way of augmenting a relatively short-term longitudinal quantitative study with material that may cover years of sensemaking in operation.

3.4   SENSEMAKING PROPERTIES

Weick (1995) himself suggests there are seven properties of sensemaking. He says the process is: grounded identity construction; retrospective; enactive of sensible environments; social; ongoing; focussed on and by extracted clues; driven by plausibility rather than accuracy. These properties will be examined with specific reference to the

experience of expatriation, using illustrations to give an indication of how this process operates in reality.

Weick (1995) speaks of the process of sensemaking being grounded in identity construction. He takes the view that individuals can call on a 'parliament of selves' and the individual is constructed by shifting between definitions of self. "I make sense of whatever is happening around me by asking what implications do these events have for who I will be?" (pp23). Weick (1995), Louis (1980) and Reason (1990) suggest the more selves to which an individual has access, the less likelihood that they will be surprised. The 'selves' making up an individuals core identity will affect the way they respond to certain inputs and can be illustrated by the experiences of children attempting to consolidate two cultures.

 The daughter of a Hungarian refugee has related how as a child she ran to her parents in panic on hearing of the Beatles first tour to America, as in her home, the Beatles were associated with communism which in turn was identified with threat and aggression. The colour red was not allowed in the home. Growing up in small town USA she described how she would have to juggle what she knew of everyday American culture with the possibility that there would, for example, be red tablecloths at a school event that her parents might attend. The meaning of and her response to the Beatles and red tablecloths as she grew up were quite different according to her receiving 'self' as daughter or pupil. (1999 SD2).

The person who has a variety of selves to call upon has flexibility in references and interpretation allowing greater 'goodness of fit' when facing potential dissonance between expectation and reality. This is illustrated by the consideration that some firms recruiting for international assignments may have a preference for the children of expatriates (Soloman 1994). Here it may not be direct international experience that is valued but rather the perception of an international self, or even perhaps the recognition of different selves, that is of interest.

A Japanese student approached a facilitator of an academic workshop covering different expatriation styles. The student thanked the facilitator and said that the workshop had explained a situation that had concerned him for some time. The son of a successful Japanese expatriate, until the workshop he could not reconcile the advice he'd received

from his father about the conduct of international business with the Western (USA) style of management advocated by his present academic institution. A passing comment in the workshop had indicated how Japanese styles of expatriation tended to contain the advice to not draw attention to yourself, not make waves and not jeopardise the company in all endeavours overseas. This contrasted dramatically with the 'make your mark', 'show what you can do', 'make a difference' style of management practice he had been exposed to on his course. The understanding arising out of reviewed experience gave him the chance to reassess his appreciation of the course. (SD3: 1998)

It is in the nature of sensemaking to be retrospective. Meaning is attributed to that which has actually occurred. It may be possible to alter expectation of future experience, but to actually bestow meaning on an experience, that experience has to have happened. This retrospective nature is liable to reconstruct events in the light of known outcome, and so it may be that the past is never remembered with complete accuracy. According to Brown and Deguid (1991) individuals make decisions on a set of 'justified beliefs'. Bradley, Henry and Perkins (1999) explain this further " In order to construct a coherent sequence of events to relate to an interviewer as to how a decision has been made, in effect (individuals) provide a causal map of their experience." (pp133).

Complex histories of events may lead to determinism in recollection that was not present at the time of occurrence.

In his article on how a certain employee was laid off following after two years expatriation in Hong Kong with Bandag Inc., Kaufman (1999) records the employee's interpretations of why the assignment ended in this way. In particular, he refers to behaviour during the assignment that was given a different interpretation when the assignment came to an end. ' Mr. B. had dealt with crises before, overseeing the downsizing and restructuring of a Bandag plant in California where the workforce was cut by 60%. But this was different. Mr. B. felt himself falling out of touch. " You have to see people face-to-face, eyeball to eyeball," says Mr. B. the former Bandag international executive. Mr. B. didn't. He skipped meetings in Iowa that were to discuss the Asian crisis. "I looked at the agenda and there were only two hours that would have included me. It didn't make sense to fly 18 hours for a two hour meeting," he says, noting that no one in Muscadine said explicitly that he had to attend. "We thought e-mail would do. But

e-mail didn't get it done. We didn't have a sense of urgency. We didn't react quickly enough that sales weren't coming in.'".

The process is enactive of sensible environments in that individuals manufacture part of the environment they face. The concept of enactment is a synthesis of self-fulfilling prophecy, retrospective sensemaking, commitment, and social information processing. Weick suggests that when people act, they are creating their environment and the situations inherent in those environments. Peoples' actions within organisations often produce structures, constraints and opportunities that were absent before they acted These actions determine the situation; and it is more often the case that peoples' preconceptions determine the action they take rather than the situation itself determining what action to take. This can be illustrated by the consideration of expatriates completing two years of a three-year assignment. What do they do to influence their future? Do they do nothing? Lobby for a return home? Apply for a further assignment in another country? The actions of individuals influence outcomes.

Sometimes this appears most evident in retrospect as illustrated by this working spouse: "Social life was not easy either. It was a major shock to leave my large circle of friends (In the Netherlands) for the restricted social life in our new location (South America). There was very little culture in the way of performances, cinemas or cafes and the opportunities to walk outside were limited. Most of the younger women had children, but since we did not want to start a family so soon, we fell outside that group. It seems as if I made a mistake by concentrating on learning Spanish and job-hunting and not joining in all the possible activities, which increased my isolation.

Soon after I had been made redundant for the second time we heard that we would be transferred. I decided to stop looking for jobs, and to relax instead with everybody else. This was quite enjoyable for the winding down period as long as I did not think about how little I had achieved during the last two years" But enacting those environments are subject to personal influences. This anonymous spouse continues… "My upbringing defines my attitude towards life and work. In my country it is normal for women to have full time careers at the same time as raising their children. For me it is essential to have professional work in order to feel that I am achieving something in my life and that my years of study have not been in vain." (Destinations 1998:15)

Recognition of constraints imposed by the task in hand encouraged a British manager to press for changes in an assignment. His family, who had experienced multiple overseas postings, was moved to Ireland, where the task of the manager was to close the local operation: a factory that provided work for many families in the surrounding area. Having previous experience of close community relationships on a previous assignment in Ireland the expatriate fought for the opportunity to place his own children in an International school rather than the school in the centre of the area to be affected by the factory closure. The family realised that in this situation   sending their children to the local school would not help either the children or the parents adjust. But the company standard regulations considered the local school adequate since these took into consideration only factors such as   language spoken and syllabus relevance. (SD4.1995). An even more complete enactment of environments is given by Fenton (2000) in her description of how Jardine International Motors when planning a joint venture in India in January 1997accomodated the wishes of their chosen person to oversee the collaboration. "Over four months, Jardine would spend thousands of dollars ferrying the manager, Steven Foster, and his wife between Hong Kong and India putting them up in luxury hotels; paying deposits on an apartment in Bombay and a house in Delhi, and to a school in the Indian capital -- none of which the couple ever used. It arranged a special travel budget for the wife to return regularly to Hong Kong and spent five months paying hotel bills for the manager to live in India while still covering the sky-high rent on his family home in Hong Kong." These expenses were incurred while the manager and his family actively investigated three Indian cities in which to set up home, rejecting one on the basis of the general environment, one on the basis of the potential costs for the company. "For Jardine, the investment in Mr. Foster -- the company declines to reveal the total spent - seems to have paid off. He has established a business that operates out of 23 locations across India, employing 800 staff and selling 2,000 cars a month." Sensemaking is a process that allows for the active participation of people in volatile environments, but bearing in mind the above, it may help for this to be a conscious process. Pascoe (2000) advises repatriating expatriates to reframe their re-entry experiences proactively: "I don't believe we are actively marginalized or pushed anywhere by others upon re-entry, even though we feel that often enough to believe it's

true. I think we arrive home on the fringe and part of the readjustment process is working our way back into the mainstream."

An essentially social process, sensemaking is highly sensitive to the influence of others, whether real or imagined. When a person is considering a move abroad they will understand this move will have repercussions for others as well as themselves-their partner, family, parents, friends, colleagues. Their willingness to move will be affected by the input of these people, either stated or tacit e.g. Young managers whose promotion abroad is greeted by congratulations and envy from their peers may contrast this with some dismay and sadness on the part of their parents. They may eventually make the decision to go in the belief that this assignment will make them more attractive to an imagined and as yet unmet future employer.

The social nature of sensemaking is also displayed when the reactions of others act as a foil to an individual expatriate's own feelings.

A 9th grade (c.14 years old) expatriate child returning to the USA after four years in London wrote the following account. "When I first moved, every adult I knew cooed what a fantastic learning experience Europe would be for me. I simply nodded yes politely, while muttering to myself that experience was no replacement for friends. The adults told me that I would make wonderful new international friends. Again, I smiled politely while thinking that new friends could never take the place of the old. Now I find myself placating these same adults by telling them how glad I am to be back, when my heart is screaming to go home. Telling Americans that it's great to be back in the USA is what they want to hear, just as the fifth grader nodding yes was the correct reaction four years ago." (1992:5 Doggett)

As a final note, the following illustration (Means CIAM online 1999) shows how important the social process of sensemaking is in repatriation. He quotes an expatriate spouse who lived in Brazil with her husband and her three sons for several years, then lived in Taiwan, teaching school there for six months.

" When I returned home," she-says, "I remember thinking what a foreign country America was--even though it was my home. I discarded my whole knowledge-base concerning-Taiwan because no one, not even my family (other than my sons, who experienced it with me), was interested. It is as though a piece of your life is plucked

away, because it is almost as though you were weird to have considered such a move, away from America, and no one wants to hear your stories because they can't relate. I just returned from visiting one of my roommates from Taiwan. I lived there with three Chinese and one American. He is getting a Ph.D. at Tulane and we talked a lot about Asia and Taiwan because of our similar experience. It felt so good to revive some of those memories and stories, to give some meaning to them, some value, and to realise that because I was able to move into the unknown of a strange environment and lifestyle, I have also been able to move more aggressively into challenging work here in America. However, almost no one is interested in you experience unless they are going overseas or coming home. As always, when someone asks about my repatriation I find it hard to verbalise."

Sensemaking is focussed on and by extracted clues. The following illustration shows how despite having an appreciation of the larger picture, an expatriate can fix on certain small factors as clues to try and gain some understanding of a developing situation.

" I was working on a project in the Far East to import latex in flexi-tanks to the Soviet Union. The project relied on the differential between the prices of drummed and container latex. In 1985, when safe sex was established as the only known defence against AIDS, this differential disappeared. For my last few months in the Far East I knew it was likely that I would be made redundant. On my return I requested the company car to which I was entitled, and when it was bought and given to me, I thought the threat of losing my job was substantially reduced. This proved unfounded… five weeks later I was made redundant." (1986 SD5).

Inevitably, Human Resources practices and occurrences will themselves feed the development of stories, and the following illustrates the importance of the delivery of minor clues, even when based on good intentions.

When a group of managers were being relocated to Switzerland, partners were invited to join employees in attend a meeting with HR about family issues. An initially apparently fruitful discussion about spouse employment was sabotaged at the end of the meeting when all male employees were given a Swiss army knife and all partners and female staff were given teacloths as gifts. (2000:SD12)

The process of sensemaking is ongoing. Some knowledge of why people become expatriates exists e.g. Culpan and Culpan (1993) suggest it is for better compensation packages, new experience, more affluent lifestyle, promotion prospects on return, exposure to new cultures and greater responsibility in the overseas job. In the Shell Outlook survey of employees (1993) Job challenge and variety, the experience of different cultures, personal growth, acquisition of knowledge and career advancement are listed as major attractions for most staff. Relocation may also come about because of impending redundancy or moves from other foreign assignments for a variety of reasons. It is important to consider expatriation may represent 'escape' from a variety of situations for an employee.

Whatever reasons encouraged an expatriate to take up an assignment, this is not a static, once and for all decision but will be open to review, particularly with regard to other significant relationships and systems outside of work. As an example, the way work and family are inter-linked has been documented, particularly in attempts to measure 'spillover' between the two (Aldous 1969, Piortrkowski 1979 Munton 1990). Expatriation is a special case. This is a situation where all aspects of life have been affected by a move for work, and to some extent, work is affected by other aspects of life in an exaggerated way.

A couple who could be described a 'global nomads' felt that over 20 years away from the country of their nationality had left them undecided about where they called 'home'. They had strong ties with a number of countries and felt their future plans could be centred on a country away from that of their birth. A return to the Netherlands, a country where their now adult child grew up, showed that their daughter had no automatic right of residence there. Their daughter found work in a third country, but the experience prompted the couple to buy property in their home country to establish roots where, should the occasion arise, all three had right of residence. Despite their daughter having her own independent employment and life in a third country, the couple made sense of the decision by reference to her prospective involvement. The couple have now (apparently coincidentally, but see note on enactive environments above) been offered a return to their home country (SD6 1997).

Finally the process endows plausibility with greater importance than accuracy. Within an expatriate milieu there is often, consciously or not, a smudging of the reasons as to why an employee is working as an expatriate. In some cases, organisations work to assess and inform employees regarding their status abroad but even within such a structure the basic rationale for an individual expatriates overseas assignment is often not explicit. e.g. an expatriate is moved to a country quickly, and unexpectedly and he is told he is required for his technical skills. When he arrives, he is surprised to find his technical skills appear surplus to requirements. However, he learns the local company are involved in a project where his language skills can be used. He reanalyses his move as being due to his language skills. In fact, he is a highly valued employee who has been moved because his home company is due for closure. This is confidential information, and the true reason for his expatriation is for the company to retain him by moving him away from 'the firing line'. His assessment that he has been expatriated for language skills is an example of sensemaking in action. Faced with partial or inaccurate information, expatriates will seek to organise the information in a way that make sense of this information for them. This aspect of sensemaking can be crucial in retaining expatriates. It can be that a highly valued expatriate, requesting a further move for personal reasons cannot be immediately accommodated. If not kept closely in touch with possibly intricate moves on their behalf, the expatriate may interpret the situation as being that the company does not value their services and leave the concern.

A well-qualified and loyal expatriate seeking information about his future moves with a large multinational was continually told a suitable placement was being investigated. After pursuing a number of approaches, constantly being told a placement was "around the corner" the expatriate took the unusual step of stopping work. While going to the place of work, he carried out no duties at all on the basis that this should at least provoke some reaction. When this failed to produce any response he applied for work elsewhere. He had formed the impression his current company did not value any contribution he might make. He was offered work with a competitor on the same day that his current employer offered him a new assignment involving promotion. He rejected the offer of promotion to move companies. When his old employer asked him to attend an exit interview he was eager to let them know why he had taken his decision. On attending for

the interview he was told no one in the building knew why he was there and he left with no record of why he had reached his decision (SD7 1996).

While each of these properties represent a particular facet of the sensemaking process, the manner in which they combine and integrate builds the framework for understanding. While the illustrations above may highlight one particular property, they also show other properties in operation. Their classification as an example of a category is not infallible and categories may overlap. For theorists in sensemaking this lack of definition in classification is not problematic and even contributes to the building of the total interlocking sensemaking framework. So it is understandable that differing threads of sensemaking can be seen in all the stories above. Sensemaking then is a complex, dynamic process triggered by an interruption of what is perceived to be knowable and understandable. The anecdotal evidence presented in this study suggests that sensemaking could contribute significantly as a new approach in explaining expatriate experience.

3.5 SURPRISE AND OCCASIONS FOR SENSEMAKING

Black, Mendenhall and Oddou (1991) have already noted the relevance of the concept of sensemaking to expatriation in their review of expatriate research. They quote the work of Louis (1980) and the current study will follow the definition of sensemaking used by Louis (1980) in her work on newcomer socialisation.

Louis' concept of sensemaking is that it is a thinking process that uses retrospection to explain surprise. "Sensemaking can be viewed as a recurring cycle comprised as a sequence of events occurring over time. The cycle begins as individuals form unconscious and conscious anticipations and assumptions that serve as predictions about future events. Subsequently individuals experience events that may be discrepant from predictions. Discrepant events, or surprises, trigger a need for explanation or post-diction, and correspondingly for a process through which interpretations of discrepancies are developed. Interpretation or meaning is attributed to surprises…. it is crucial to note that meaning is assigned to surprise as an output of the sense-making process, rather than arising concurrently with the perception or detection of differences." (Louis 1980:241). Louis suggests attempts to place stimuli into frameworks become most visible when predictions break down. Weick (1995) says this leads to the assumption that sensemaking

is partly controlled by expectation. Both academic literature and current business studies of expatriation suggest expectations may be significant in expatriate experience. In her study of relocation stress experienced by families during relocation in Australia, Coyle (1986) found the expectation of moving (i.e. knowing the move would take place) did not relate to either the reaction to the offer nor to the ultimate satisfaction with the placement. Indeed it seems likely that it is mismatch of expectation of what the assignment would mean. That is a discrepancy between what an expatriate expects and what an expatriate perceives as actuality on taking up the assignment. ('The most common cause of assignment failure is attributed to a mismatch of expectations by 60% of companies.' PricewaterhouseCoopers1998: 34) rather than expectation of relocation itself that is significant. As far as a sensemaking model is concerned the actual areas where these predictions break down is immaterial…whether they concern cultural differences or job factors, family issues or organisational differences, the result is that the sensemaking process is triggered. How do expatriates develop expectations? An expatriate will develop expectations as a result of internal personal constructs and their application, reinforcement or modification by surrounding systems. In organisational and expatriate situations there will be certain key shared constructs which may prove more resilient than others because of reinforcement by adjoining systems. Certain expectations may therefore prove harder to falsify than others. e.g. an organisation attempting to say a refusal to move will not have an effect on career or employment may be undermined by the input of the expatriate community outside of the company. In this regard it is it is important to note the effect rumour may have in expatriate situations. Given the exaggerated role work may play, and the small communities that may be involved, it is understandable that in an expatriate situation, misinformation also has an affect on expectations.

How surprise is experienced on an overseas assignment is graphically explained in the following illustration.

"I spotted two listings for jobs in the Tuesday Guardian's TEFL jobs page. Two days later I had my first interview with a young, friendly and professional Chinese woman in her elegant home. The job was well paid. She told me it was in a provincial capital in northeastern China. She mentioned it was cold there. I said I'd lived in Canada, I could

handle it. "How close is it to Beijing?" I asked—proximity to a friend who was living there was important to me. "8 hours on the train. Very close," she replied. Two weeks later I arrived in China to find the school wasn't completely built. Somehow this hadn't been mentioned. For 2 1/2 weeks the fourteen new teachers lived in a hotel with no food supplied and hot water that came on for a half-hour in the middle of the day—while we were teaching. The teaching was exhausting. I had taught for a total of 6 hours in my life and was now teaching 24 hours a week—the upper limit according to most TEFL teachers. Then winter hit. I'd never felt anything like it. I was cold down to the bones— indoors and out. This wasn't Canada; this was Siberia. It was impossible to visit my friend in Beijing, the 18-hour one-way trip didn't permit me to pop down for the weekend (my only free time). My advice is this: make sure you know what you're getting into. Get ALL the facts about the job, the climate, the culture, the pay, the contract, the living situation, travel options … anything you can think of before you arrive. It may save you some unwelcome surprises." (iAgora online 1999). This is echoed in the words of a British manager in Bangalore "It's such a different culture, you're continually surprised and fascinated" (Coles, M FT 8.2.98).

Mandler (1984 :188) suggests there are two types of event or situation that lead to sensemaking being triggered: unexpected events happening and the failure of expected events to happen. "In either case the ongoing cognitive activity is interrupted. At this point, coping, problem solving and learning activities take place." Expatriation has long been considered fertile ground for learning based on the questioning of established concepts. Literature describing expatriate 'blunders' (Ricks 1999) involves stories and anecdotes about how the occurrence of unexpected events or non-occurrence of expected events led to re-evaluation of understanding.

Such surprise is not limited to expatriation but also extends to repatriation. The account given below is that of an expatriate returning to the USA after an 18-month assignment in the UK. 'Because most of our former neighbours were still there and we had maintained contacts with our church, outward appearances suggested things would be much as they were before our move to London. These outward appearances proved to be misleading initially.

My wife had a most unsettling welcome back to the community. Much to her surprise, she was no longer sought as an experienced volunteer leader. She was relegated to the role of a newcomer at the bottom of the heap - licking envelopes and doing grunt work……….. Experiencing this social phenomenon while moving back into our community was extremely painful for her. In a similar way, our #2 son was perceived as the new teenager in town. Even though he had known them before, his schoolmates had changed their interests and activities while he was abroad. So he also had difficulty "breaking in"…. For each of us, settling in our old community took much longer than expected". (1992:16 Piker).

Because of the constantly changing life phases within the expatriate family system, and the emotional and stress elements involved in meeting these, it is possible any learned understanding of the processes involved is diminished, aided frustrated or helped by the emotional responses of all familial members and the interaction between them. For example, a couple whose experience in expatriate social networking has previously provided a coping mechanism in moves, may find their ability to initiate a new social circle limited by their teenage child's regression to dependence following a move. The expatriate who has returned to his home country several times who understands most of the processes of repatriation may be shocked by delayed bereavement for a parent who died during his last assignment. A spouse with a portable career may not be able to pursue employment because of the emotional and time demands of elderly parents in the home country.

Expatriation acts as an interruption in the status quo involving individuals in some form of transition. Louis (1980) considers two types of transitions: Interole, when a new and different role is taken, and intrarole when a person adopts a new orientation to an old role. Both sorts of transitions are regularly experienced in an expatriate assignment, and sometimes one expatriate career can illustrate aspects of both.

 One British expatriate told of his experiences with labour relations over his working career that began in the 1970's in the UK. Although a technical manager, a major proportion of his working life was spent dedicated to labour relations because of the adversarial industrial climate at the time. He then moved to the Netherlands where in his new similarly technical position this was no longer necessary because of the very

different co-operative labour relations existing in the Netherlands. In effect his job was changed entirely. In a subsequent move to Australia in the early 1980's he once again met similar working practices to those that had coloured his work in the UK in the 1970's. This time, armed with the knowledge and experience that an alternative situation was possible, he was better equipped to find alternative means of addressing the labour relations issue (SD9 1995).

In a situation where a certain amount of difference is anticipated, as when people expatriate, the unexpected happening and the expected not happening can be a complex equation. Consider the following email posting in an online support group for expatriates: "I've only moved to England, which is stressful enough! We've been here a year, and I still feel largely unadjusted. I've been working and involved in some things, and that definitely helps, but I still miss the comforts of home, and the rest of my family and friends. When we moved we were given a model that discusses expatriate adjustments. Apparently by 6 months people are supposed to be feeling adjusted. I'm really not on that schedule at all. It's not that I regret the experience, or that I can't cope, I just get 'home-sick' much of the time. Has anyone else dealt with this? What has helped?" (SD10.1999.)

In this posting, it's clear that aside from any anticipation of cross-cultural difference to cover the unexpected happening, the adjustment course attended by this expatriate had stimulated an unmet anticipation of control regarding the timing of any adjustment. Through this the course itself had produced the expectation of a time scale that did not proceed as expected. Input from the online group suggesting her reactions were not unusual and questioning the information on timing she'd received through the course prompted the following response: "Thanks so much …….Those were some great suggestions, and insights. …………..To tell the truth, I feel better already knowing that this is all quite normal….!" (SD10 1999)

From the above example it can be seen the input from the group directly helped bring about a conscious re-framing of the way this expatriate viewed their acculturation experience, from problematic to 'normal', resulting in a change in response. This then serves as an example of a possibly innate human need for sensemaking triggered by surprise and gives a graphic indication of the effects of the process in this instance.

There are however problems with sensemaking in terms of methodology. The fluidity of the sensemaking process brings with it considerable methodological problems. To study sensemaking the researcher has to accept that they are essentially attempting to capture fleeting phenomena – constantly in 'a state of becoming'. The anecdotal examples above illustrate sensemaking well specifically because they utilise the qualitative methods advocated by sensemaking theorists. Although sensemaking as a theory could make a significant contribution to studies of expatriation a useful start would be to check if sensemaking could be operationalized in a way that allows for more direct comparison with adjustment theory, thus using the quantitative methodology familiar in past studies. Such a study could potentially act as a bridge for other more qualitative sensemaking studies to be related to expatriation.

3.6   CONCLUSION

In this chapter sensemaking literature has been examined and it has been discussed as a central concept in the understanding of expatriate experience. Sensemaking properties were illustrated by the use of narratives that are able to display these properties in all their complexity and how sensemaking is triggered by surprise has been described.
The next Chapter will consider those inputs or ' sensemaking elements' that influence the conscious reframing and interpretation of experience.

CHAPTER 4 : SENSEMAKING ELEMENTS

4.1   INTRODUCTION

This is the second Chapter that outlines the theoretical basis of this study and related literature. In the last chapter, surprise was seen to be a trigger for sensemaking, and in this chapter the objective is to look at sensemaking in more detail, particularly sensemaking elements - those inputs that moderate sensemaking - when it is triggered by surprise. Having initially investigated elements identified by Louis (1980) as significant to the process, this Chapter goes on to explore two potential sensemaking elements in expatriation – Socio-cultural brokerage and Sense of Coherence. Arising from these the chapter discusses the adoption of a salutogenic perspective that accepts uncertainty as natural and inevitable in modern global business practice. Then briefly the implications of sensemaking for practice in the management of expatriates are considered.

4.2   INTRODUCTION TO SENSEMAKING ELEMENTS

What elements can influence the way people deal with a breakdown in prediction, with surprise? Louis (1980) provides a useful account of the elements she considers play a part in the process of sensemaking in her research into the socialisation of newcomers (based on her research into how MBA's cope with their early job experiences) in organisations. Her research is widely quoted in other expatriate studies (Black and Gregersen 1991; Ayree and Stone 1996; Harvey 1997; Bonache and Fernandez 1997; Peltonen 1998; Feldman and Bolino 1999; Hippler 2000) and is generally seen as relevant to the way people make sense of novel situations. Louis lists four major inputs as instrumental in the sensemaking process. These are general personal characteristics, past experience, influence of others and local interpretation schemes. (Fig.4.1).

Louis based her four inputs on observation when she compared newcomers' experiences with 'insiders'. "Their past experiences with similar situations and surprises help them in coping with current situations. Individuals are also guided by their more general personal characteristics, including pre-dispositions to attribute causality to self, others fate

etc…..as well as ….their orienting purposes in the situation and in general' (Louis 1980:241).

Fig.4.1: Louis' Sensemaking in Organisational Entry (1980)
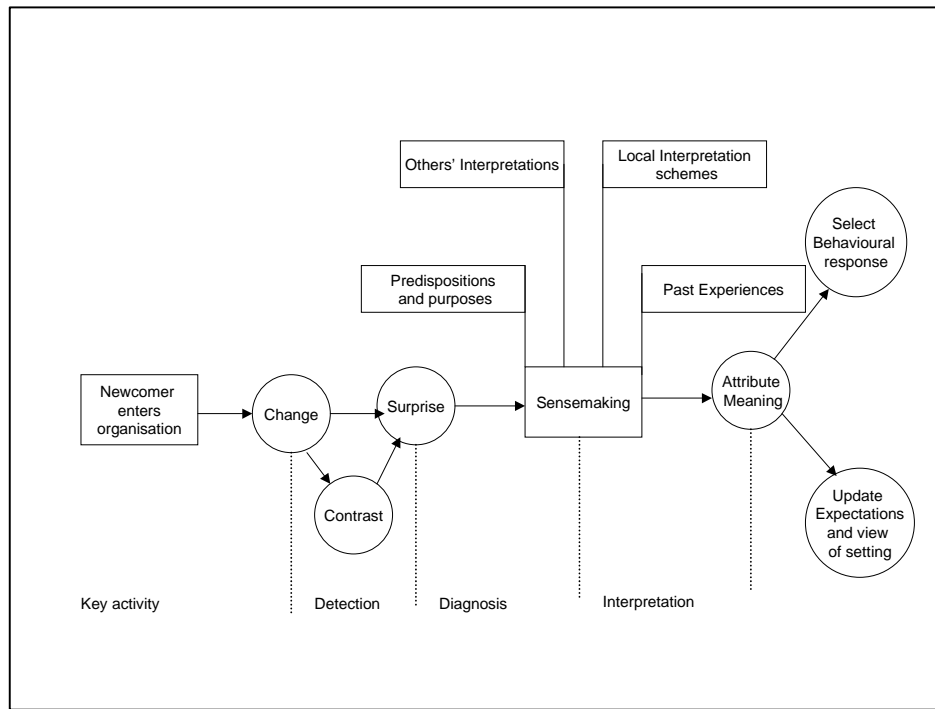
As regards local interpretation schemes, she suggests newcomers probably do not have adequate history in the setting to appreciate as fully as insiders might why and how surprises have arisen. As a result a newcomer often attaches meaning to action , events and surprises in the new setting developed through their experiences in other settings. Finally she says that in comparison to the situation of insiders, newcomers have probably not developed relationships with others in the setting with whom they could test their perceptions and interpretations. "Since reality testing is seen as important in sensemaking it seems particularly important for newcomers to have insiders who might serve as sounding boards and guide them to important background information for assigning meaning to events and surprises" (Louis 1980:243).

Considering how to translate Louis' study to the world of expatriation, it is clear aspects of these four inputs have been investigated in previous expatriation studies. A number of

factors have been studied in the past relating individual characteristics to expatriation outcomes. These have included factors which can be considered to be related to both general personal characteristics (Empathy: Reuben 1976; Self confidence: Ivancevich 1969; Initiative and Intelligence: Guthrie and Zetnick 1969; possessing effective communication and listening skills: Abe and Wiseman 1983) and past experience (Church 1982; Black, 1982; also ability to learn from past experience: Spreitzer; McCall and Mahoney 1997; Black 1990; interpersonal skills Clarke and Hammer 1995) By and large these have produced partial explanations for adjustment, and understandably expatriate research has moved to a consideration of the experience as a complex phenomenon in which many of these aspects play some part. Similarly, the concept of the influence of others via social networks (Briody and Chrisman 1991) and local interpretation schemes, particularly the use of training schemes (Brewster and Pickard 1995; Reeves-Ellington 1993; Tung 1981) have been examined and these too have been thought to have some significance.

4.3   PROPOSED EXPATRIATE SENSEMAKING ELEMENTS

This study's task is to identify theoretically sound elements that comply with Louis general schema, address sensemaking components and can be applied to expatriate experience. It proposes that two elements; sense of coherence and socio-cultural brokerage may contribute to an attempt to operationalise the concept of sensemaking in expatriation. Sense of coherence offers to integrate Louis' general personal characteristics and past experience inputs, and socio-cultural brokerage offers to integrate the inputs of influence of others and local interpretation schemes she describes. Sense of coherence is an element whose quantitative methodological construction is similar to the types of individual pre-dispositions and general personal characteristics previously addressed in adjustment theory. Socio-cultural brokerage that has a qualitative methodological pedigree, representing the methodological methods familiar in sensemaking theory, which focuses on how others influence and help individuals interpret their perceived world. These two elements are examined below.

4.4   SENSE OF COHERENCE

4.4.i Combining general personal characteristics and past experience

If expatriation is thought of as a potentially hazardous interruption in the status quo it seems "A hazardous event can be experienced by the individual as either a threat, a loss, or a challenge. A threat may be directed to instinctual needs or to an individual's sense of integrity or autonomy. A loss may be that of a person or an experience of acute deprivation. A challenge may be to survival, growth, mastery, or self-expression. Each of these states has a major characteristic affect. Threat carries with it high anxiety. Loss is experienced with affect of depression or mourning. Challenge is accompanied by some anxiety but carries with it an important ingredient of hope, release of energy for problem-solving, and expectation of mastery may be to survival, growth, mastery, or self-expression." (Rappoport 1970:276).

What brings about such different responses? Why should one expatriate experience a situation as threat, another as challenge? It has already been seen that work in adjustment theory has attempted to identify personal dimensions have been found to impact a manager's transition to an overseas assignment. If general literature which looks at types of people who can cope with or make sense of difficult situations (loss of employment: Kobasa 1982, family contribution to children's health: Boyce, Schaefer and Uitti 1985; Reiss 1981, social climates: Moos1985) is considered, the work of Antonovsky (1987) based in the field of health, is particularly interesting. His fundamental contribution was to argue that research should focus on health and the forces that help people maintain effective functioning even in the presence of hazardous influences. In his Israeli national sample, he looked at people who appeared to survive and cope remarkably well with trauma. People in his sample were known to have undergone severe trauma with inescapable major consequence for their life i.e. severe disability, loss of loved person, difficult economic conditions, concentration camp internment, or recent immigration to Israel from the Soviet Union. Yet the people sampled were thought by a referee to be functioning remarkably well.

Although most of the examples quoted in this study are based on the everyday life of expatriates, this response can best be illustrated by reference to an unusual and extreme but well-known and well-documented expatriate experience.

In 1986 John McCarthy was taken hostage in Beiruit at the start of an overseas journalism assignment. 10 years on his reflections display the characteristics that Antonovsky identified in describing his concept of Sense of Coherence.

"McCarthy was released after five years' detention in 1991, a year after Keenan. His first appearance as a free man was unforgettable, the way he strolled into the chaos of the paparazzi in Damascus, calm as you like. ``Well, hello,'' were his first words. There wasn't a hair out of place. The newspapers called him a very British hero and marvelled at how he could return from hell with a dignity bordering on insouciance."

McCarthy's own account of the experience recognises the difficulties and extreme nature of his situation. "He tells me about the occasion he had given up, not spoken for days, and all he could hear was Keenan and Tom Sutherland firing banal questions at him. ``I suddenly became aware of what they were doing. They were talking round the clock just to get me talking again. They were willing optimism back into my body"……His rehabilitation has been slow and disquieting, but now he feels it is complete. ``You know, after six months, I'd look back and think, a few months ago I was fine but now I know I am, then, a year on, I looked back and thought, six months ago I thought I was fine, but now I know I am. It went on till I'd been home five years………McCarthy tells me of all the great projects he has got lined up - books, TV programs, radio. He says he knows he wouldn't have got these opportunities had he not been kidnapped. Earlier this year he married Anna Ottewill. ``Finding the right person and settling down has been wonderful. It's just that idea of being established, another part of your life that is defined. ''He talks about how fortunate he is, how blessed. He says he no longer feels the past peering over his shoulder." (Hattenstone 1999).

Antonovsky considers what contributes to such a response – " What predicts to a good outcome?"(1987:7). He adopts a salutogenic perspective. He questions the concept that illness is the move away from normal, self - regulatory homeostatic processes.

Fig.4.2 Comparison of 'Pathogenic' and 'Salutogenic' models of Expatriation Glanz, Williams, and Hoeksema, (2001)
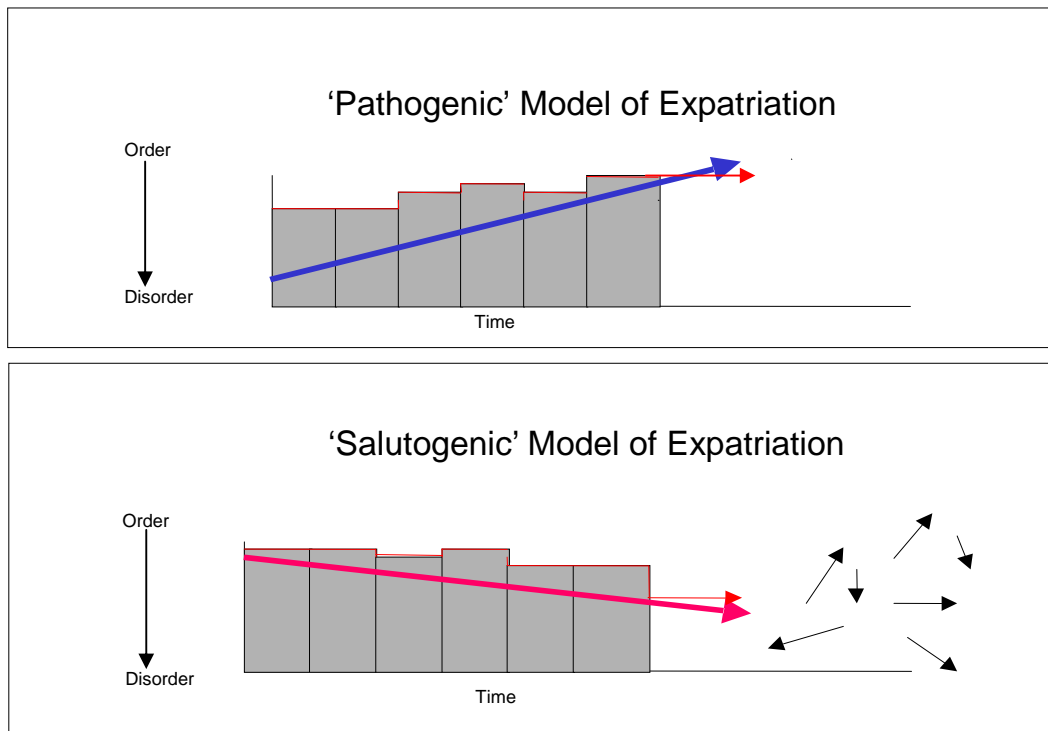
Instead he proposes heterostasis, disorder and pressure toward increasing entropy (chaos) is normal. Basically he states everyone is dying and this is the natural order of things. Health then becomes the product of a series of measures, starting with elementary needs the provision of water, food, shelter and then an increasing hierarchy of needs (e.g. Maslow 1954) that promote health. Crucial to the understanding of what follows, is the belief in his model that certain 'pathogens' can be beneficial.

He suggests coping with certain stressors may have positive outcomes. This is particularly important in a consideration of expatriation, as so many studies treat stress as negative rather than neutral. A salutogenic approach to expatriation would see all moves as subject to disorder and change, but containing the seeds of order, as opposed to seeing all moves as organised, containing the seeds of disorder. (Fig 4.2) Such an approach better allows for positive aspects of change and disorder, and sees flexibility and challenge as contributing to the overall scheme of things. In time this approach builds on experience to construct an inner sense of coherence.

4.4.ii The position of Stress in Culture Shock and Sense of Coherence

Antonovsky's measure of sense of coherence, which is central to the salutogenic model and to the understanding of the relationship between the social system and the individual's well-being, has been used by nearly l50 researchers around the world; the measure which was constructed with academic rigour has been translated into twenty languages. It has been used to investigate a wide variety of stressful situations e.g. responses to natural disasters (Kaiser, Sattler, Bellack, and Dersin 1996) coping with partner's dementia (Baro, Haepers, Wagenfeld, and Gallagher 1996) adaptation of army families to relocation (Bowen1989) loss of a family member (Larsson, Kallenberg, Setterlind and Starrin1994). In contrast to the way stress has often been considered in expatriate theory (Zeira and Harrari 1977; Harvey 1983; Coyle 1986), Antonovsky suggests stressors should not be seen in the context of mitigators, buffers and moderators, but can also be seen as motivators, movers and so on. This helps explain Coyles (1989) observation that models of stress (e.g. Holmes and Rahe 1967) sometimes do not address the high levels of stress predicted in an expatriate situation, which do not result in negative outcomes.

A great deal of adjustment literature concentrates on emotions arising from the breakdown of controlled, predictable environments on expatriation ('culture shock'). There is a debate as to whether anticipating such emotions may help with adjustment, as by and large these emotional responses have been considered problematic and unhelpful. Weick (1995:46) adopts what could be seen as a salutogenic approach in considering the emotions associated with interruptions in general. "Interruption is a signal that important changes have occurred in the environment. Thus a key event for emotion is 'the interruption of an expectation'. It makes good evolutionary sense to construct an organism that reacts significantly when the world is no longer the way it was". In this way, what is commonly known as 'culture shock' can be seen as the emotional manifestation of sensemaking in operation.

 A study by Hawes and Kealey (1981) of Canadian expatriates in Africa found some of the persons who experienced intense culture shock were ultimately the most effective in their work sphere of technology transfer. Using a concept of stress as motivators, movers and so on, in the manner of Antonovsky (1987), it would be possible to forward an

interpretation that confronting these differences may have contributed to eventual understanding and effectiveness on the assignment.

Confronting stress - not extreme stress but some of the everyday continuous stress that underlies a great deal of culture shock is portrayed in the following email from a very experienced American expatriate spouse, now leaving Tobago, en route to a new posting in Switzerland:

"I was still too embarrassed to tell this story when I was in Tobago, but I'll share it with you -- At the beginning of our lives as expatriates to a really "foreign" destination (Asia as opposed to Europe), we moved to a remote island in the Philippines where we were the only expatriates living on the company compound. My husband's boss, Mr. X, was returning to Switzerland and his going away party at the clubhouse was our first social function in our new country. One of the men stood up and made a very eloquent speech about Mr. X, and then he said that each of the wives would also say something about him. Gulp -- WHAT did he say?!?! At this point I was beyond terror! I had met Mr. X for a few minutes when I was still jet legged, and deep in the maternal fog of being responsible for a baby and a two-year-old in a completely new and FOREIGN place. I literally did not have a clue about what I could say, and to top it all off, it seemed as if the other wives had plenty of amusing anecdotes to recount. The microphone was getting closer and closer. My mind was blank, and my heart was pounding so loudly that I was sure that everyone in the room could hear it. Somehow or other I managed to say something that wasn't completely lame, and my husband's career didn't end in a shambles as I had envisioned in the excruciating minutes that it took before the microphone reached me. You would think that this would have been enough for one night! No, the next item on the entertainment schedule was karoke. Yikes, my family doesn't even attempt to sing Christmas carols, yet once again the microphone was coming in my direction and everyone insisted that I HAD to sing a solo! My husband correctly surmised that if he didn't bail me out that he would be living by himself in the Philippines, so he came over and we screeched out a duet. Lately, I've been thinking and thinking about this party that took place about 10 years ago, and it still makes my blood run cold. I think that it was especially traumatizing to be in a situation where I also didn't understand the basic rules of the game. The evening was so different than I had imagined it would be, and that in

itself was incredibly frightening! While I was getting ready for the party, I certainly didn't expect that I would have to make a speech and to sing (!!!).

So, why am I thinking about this party so much right now? Maybe it is because we are at the "good- bye" stage of our current posting, and I'm starting to think about how I will have to, once again, learn to play by different rules in a "new" country. (SD.11.2000).

It is difficult to know how far previous expatriate experience is of help in a new posting. Most of the information regarding how previous experiences as an expatriate can provide transferable skills and knowledge is anecdotal, partly because of the complexity of the processes involved. There is some literature which implies previous expatriate experience teaches the mechanics of transfer, and also provides some learning about expatriate processes, so that for example, experienced expatriates may have learned to review expatriate packages more critically than inexperienced expatriates. There is also some research (Stichting NOB 1992) that suggests the way Dutch children who have attended school in non- western countries may be influenced by their experience, particularly in the way they seek new relationships. However, according to sensemaking theory, it may also be that past experience provides the greatest block to change and development and the ability to gain new skills. Antonovsky (1987:19) indicates why this may be the case. He states "Confronting a stressor ...results in a state of tension, with which one must deal. Whether the outcome is pathological, neutral or salutary depends on the adequacy of tension management." He describes factors determining tension management as 'generalised resistance resources' Examples of these are money, ego strength, cultural stability, social supports and so on. He sees stressors and resources on a continuum that he calls the GRR-RD (Generalised Resistance Resources - Resistance deficits) Thus lack of peer support is a stressor, good peer support is a resource.

Common to all generalised resistance resources is that they facilitate making sense out of the many and varied stressors affecting someone. Over time they generate a strong sense of coherence described by Antonovsky as "a global orientation that expresses the extent to which one has a pervasive, enduring though dynamic feeling of confidence that one's internal and external environments are predictable and that there is a high probability that things will work out as well as can reasonably be expected." (1987:19)

4.4.iii. Sense of Coherence components

Antonovsky constructed his own quantitative scale to measure sense of coherence and it is proposed using this scale in this study. The scale is based on three components: comprehensibility, manageability and meaningfulness which are crystallised in three questions: does one think that one can understand? Does one think that one can manage? Does one wish to manage?

Comprehensibility refers to the extent to which the stimuli deriving from one's internal and external environments in the course of living are felt to be structured, explicable and consistent.

This is most easily illustrated in expatriate terms by a situation where things are thought to be comprehensible, but are not, on repatriation.

'In Asia I never felt disconnected from my own culture . . . as long as I lived 9000 miles away from it…. On another level, I completely lost track of England and knew nothing of the day-to- day events of the last 15 or so years. This made it difficult when, for example, the general populous expected me to be English and I wasn't. To all intents and purposes, I was foreign and I had no idea what the new coinage looked like, or which latest Royal sibling had got married, let alone who was top of League Division One.

In London, I fumbled on the 73 bus (that I had taken for years in my student days), and found myself saying "20p to Upper Street please". The conductor looked at the (unknown to me) illegal tender 10p coins that I was offering and said bluntly in his Barbadian accent: "Where YOU been, lady?" How do you explain this kind of ignorance? Just because I spoke English it was assumed I lived in England, this was never more clear when I used to ask for forms for VAT refunds in Oxford Street stores. The shop girl would look at me strangely and in a ripe estuary accent declare: "I thought you was English." "I am," I would reply, "but I live abroad". I concluded that if I had had a heavy French accent it would have been easier.' (Shalgosky 2000)

Manageability or load balance considers the extent to which resources are available to meet the demands posed by these stimuli. 'Underlying …. the flexible employment of appropriate resources, is the belief that one indeed has such resources at one's disposal. Note, at one's disposal, not in one's control.' (Antonovsky 1993). Such resources and demands refer to a variety of resources that may or may not normally be considered as

falling within the confines of work requirements. The following example quoting the spouse of an oil company executive describing the company reaction to the Bali bombing in 2002 shows how such responses to pressures outside work can affect the load balance of expatriates.

"After a slow start, ConocoPhillips Indonesia has really come through on this," she reports. "Like everyone else, they were caught be surprise by the Bali bombing, and their initial communications and actions weren't as effective as they could have been.

"However, they admitted their mistakes and moved on. Now the spouses and employees get e-mail updates, we all have pagers and phones so we can be contacted quickly. Partners are invited into town hall security meetings and the company has supported such things as having the security firm come out and show parents how to check school buses for bombs.

"They were also one of the first of the oil companies to lay out a series of options for employees to manage the school closing crisis. These options ranged from provisions for home schooling (which already existed but were brought to our attention), to having the family move to Singapore and flying the employee out for weekends, to having the family move home so the employee would go on single status and allowances would be recalculated so the two households would not be financially hit too hard.

"None of the options are easy, but the feeling that the company is handing back some control over our lives is amazingly therapeutic." (Pascoe, 2003).

Meaningfulness refers to the extent to which these demands are challenges worthy of participation and individual investment. Meaningfulness is a concept similar to the concept of task significance in Hackman and Oldham's Job Characteristics Model (1976), but it is important to see that Antonovsky's concept of meaningfulness can cover situations both in and out of work and then look at the combined effect on expatriation. On expatriation, surprise can occur which shakes fundamental understanding of taken-for-granted systems and institutions.

A South American couple took up assignment in Northern Europe. Their severely handicapped child accompanied them. They did not involve the company in arrangements for their child as in their home country, their child's condition was considered a matter of private grief, to be dealt with and financed by the family themselves. Acting on their

'programmed scripts' they believed the care of their daughter would be arranged through private doctors and brought the name of a recommended doctor with them. Arrival showed that such handicap was a matter of public concern at their destination, with limited day care provision regulated through approved bodies and involving a long selection procedure and waiting lists, together with significant implications for medical insurance. After the initial shock of their situation, the family were given significant help by the intervention of their company's Human Resources department, the local partners support scheme with contacts in a special needs group for expatriates and the company medical department. The family was able to return home on completion of the assignment with instructions and tapes explaining the radical treatment that had advanced their child's abilities during day centre treatment in the destination country (SD8.1996). From the above example one can see the meaningfulness component of expatriate experience cannot be measured in work terms alone.

Antonovsky (1987:19) suggests the three components are intertwined but separate and build into a way of viewing how the patterning of life experiences may affect responses. The illustrations above help to show this interconnection and give some indication as to how responses build into a sense of coherence.

He believes the most significant feature of a strong Sense of Coherence is the variety and number of coping strategies available. He says Sense of Coherence is not a trait, or state but rather a dispositional orientation. '….I wish to make it clear that the SOC is not a specific style of coping. In fact, it works precisely because it enables one to select that mode of coping, those resources, which seem to be appropriate to the particular stressor complex which one faces.' (Antonovsky 1990). Behaviour cannot be predicted, although the quality of behaviour can.

The attraction of using Antonovsky's Sense of Coherence concept to examine expatriation is that it attempts to bring some predictability to the way individuals meet unpredictable circumstances. This acceptance of unpredictable circumstances means it could be a useful instrument to examine individual experience in the context of the continually changing, unstable business environments described above. Most importantly for this study's purposes, it forms a measure to unite Louis' individual characteristics of general personal characteristics and past experience. Antonovsky's sense of coherence is

a measure which attempts to gauge how responses to previous experience build into a broader personal characteristic which gives some indication of an individual's view on the world as a whole.

4.5   SOCIO -CULTURAL BROKERAGE

4.5.i   Combining influence of others and local interpretation schemes

To complement the flexible contribution Sense of Coherence may make to a sensemaking model of expatriation, a equally dynamic and adaptable element should cover Louis' inputs of influence of others and local interpretation schemes. Sensemaking is essentially a social process. Weick (1995:39) states, "Those who forget that sensemaking is a social process miss a constant substrate that shapes interpretations and interpreting. Conduct is contingent on the conduct of others, whether those others are imagined or physically present". So other people play a significant part in sensemaking. How people are influenced by others, and local interpretation schemes are essentially the most social dimensions of sensemaking in expatriation. Availability of and accessibility to various types of social contact govern these two inputs. For this reason, this study suggests some form of social mediation or socio-cultural brokerage may act as a vehicle for these inputs and provide a useful second element in a sensemaking model.

In their summary of Louis work and its implications for research with regard to expatriation, Black Mendenhall and Oddou (1991) suggest: "The inputs for an individual's attempt to understand the novel or the unexpected situation comes from several sources: past experience, a set of cultural assumptions and input from associates. Unfortunately, these sources are often inadequate because the person does not have enough history in the new context or isn't acquainted with enough or the right people to help interpret the discrepancies or novelties in the novel context."

It may be these sources can be or are manipulated by individuals in an expatriate situation, and such manipulation leads to a greater command over and satisfaction with the expatriate environment for either themselves or others. The means of this manipulation may be socio- cultural brokerage.

 This concept is examined more fully in section 4.5.iii but first this study looks at past work on the social aspects of expatriation.

4.5.ii The Social Aspects of Expatriation Experience

The social aspects of expatriation have previously received attention. In terms of structure within organisations Harzing (1999) identifies '(elements of) control by networks or socialisation as the most appropriate control mechanism for uncertain environments' (1999pp 83). Evans (1991) notes the significance of international mobility on the development of an informal 'network of personal relationships based on long term trust' as a mechanism of co-ordination within companies. It is via this 'nervous system of the organisation ' that important horizontal initiatives get implemented.' He suggests that this system requires a large number of loose ties ('knowing someone who knows someone') but these can be based on strong ties between key people in the organisation. Aryee and Stone (1996) recommended the introduction of a 'buddy' system as a means of socialising newly arrived expatriates on discovering co-worker support to be significantly positively related to work adjustment. An attempt has been made to discuss to what extent receipt of informal supervision and support at work contributes to satisfaction in expatriate situations by Feldman and Bolino (1999) who found informal mentoring in expatriation can contribute to satisfaction on assignments.

 Outside of the work environment the social aspects of communication and support within expatriate families has also been shown to be important for adjustment on overseas assignments in research with expatriate families taking a systems perspective. (Caligiuri, Hyland, Joshi, Bross 1998). Access to social relationships and networks were emphasised in Briody and Chrismans' study of General Motors families (1991), especially for spouses. It appears expatriates finding some form of meaningful dialogue with other people to helps explain and define changed situations.

The value of finding such dialogue is well established in relocation and adjustment literature. "I am a non-Dutch, non-working woman. One year ago I was still living near Pisa, Italy. Alberto, my husband, got an offer to work for his company in the Netherlands. After days of thinking and hours of discussions we finally decided to accept the offer and move to Amsterdam… After unpacking and the initial settling down, Alberto had long days at work and I had lonely days at home. Once all the museums, many sights and shopping streets were visited, it was clearly necessary to adapt and to meet other people……As a complete beginner, I decided to take several hours of (Dutch) classes a

week and practice through self study and conversations in daily life. After visiting a few schools, I chose to join semi-private classes that were held in the apartment of the teacher………… In addition I took one private lesson each week with a retired schoolteacher, with whom I established very close contact. Many of our conversations were about personal life in the Netherlands and my future here. She made me understand how to do things the Dutch way and became an important person in my life" (Expats at home 1997:16).

The male spouse quoted in Coyle and Shortland (1992) clearly attributes changes in an expatriate experience to meaningful dialogue with an individual. This example shows that such intervention need not be the sustained contact associated with mentoring and social support but can relate to single or short tem incidents. It can also come from informal or unexpected input.

"For the first six months it was difficult to settle in. I was a male in what is mainly a female environment of people that stay at home in an expatriate community. I didn't meet anyone, therefore I didn't find out or make any of the networks that women would normally make…The change came as we started to meet people who were strong supporters of us. My wife went along one morning to a talk on 'Health, Stress and the Expatriate' and afterwards she went up to the lady almost in tears and said 'Help, we're not going to make it" and the lady said 'Come round and talk to me' - which we did. We spent a whole afternoon getting it off our chest and she advised and counselled us - really made us answer some of the questions that we should have been firm enough to ask ourselves - and we came away with some strategies and once you have those strategies to go after, life looks a lot better. And so the focus for me was starting my own business. Once we'd set up the business it gave me the opportunity to get out and work in the business environment and so I was meeting other men which I hadn't easily been doing up to that point."

The lady giving the talk acted in the role of 'threshold guardian' or 'magical friend' (Osland 1995) in her application of Joseph Campbell's 'hero's adventure' to the expatriate experience.

To illustrate this role, she quotes an American international lawyer working in Belgium. He attributed his high degree of acculturation in Brussels to a person from the host

culture who 'basically looked at me in the Ugly American role and viewed it as her job to educate me in the ways in which refined people in Europe conduct themselves.... She would take me along to luncheons and dinner parties and introduce me to all the right people and make sure that I said the right things at the right time" (Osland1995:48). She continues "Whatever form the magical friend takes, the function of that friend is to provide expatriates with the moral support and guidance they need to survive the trials and obstacles that make up the next stage in the hero's adventure." (Osland1995:48) Where the future is unknown, organisations and individuals become pioneers in novel territory and in this regard the work of Rogers (1995) on the diffusion of innovation is of interest. Rogers describes the role of individuals who can stand in two camps and provide clarity and interpretation as crucial to the diffusion of innovation. This suggests that in dynamic fluid environments, such intermediaries provide the catalyst for the distribution of knowledge. The concept of a link person(s), interpreter(s), guide(s) or intermediary(ies) then may well be a good starting point for an element to combine both the sensemaking inputs of the influence of others and local interpretation schemes in expatriation. The business advantage of this within organisations has already been pointed out by Janssens (1995:165). She suggested that in the conduct of global business, " Organisations...will need mediating persons able to respond to other culture influences by selecting, combining and synthesising the appropriate features of these respective social systems without losing their cultural cores." This is not simply a cultural issue, but may be applied to all aspects of expatriate life.

A young expatriate in Singapore recollects how a director of an associate firm gave extremely generously of his time, contacts and insights both inside and outside work to help the expatriate and his wife settle. " He'd lived in Australia himself, so understood what it was to cope with living in another culture. He explained customs, showed us aspects of the country to which we would never otherwise have had access and helped us on a daily basis. One day, I was asked to provide a list of names to the chairman of his company. Knowing it was required urgently, I typed the list carefully and swiftly, put it into a plain white envelope that we used in everyday business, and rushed it to him, handing it over personally, with two hands as I knew to be the custom. I knew from his polite but very shocked reaction that I'd done something terribly wrong. Later, our friend

explained the list was names of international specialists to treat the Chairman's recently discovered cancer. To have handed him a white envelope, the colour of death, in those circumstances was a mistake of the first order. I should have used red or gold for luck, or at the very least, a neutral plain brown envelope. I don't know exactly what he did, but I do know from information that filtered back to us, that without our friend taking a lot of trouble to smooth things over, our relationship with that Company would have been gravely jeopardised" (SD12.1986).

This experience is far from unusual. "One of my postgraduate students wanted to explain why Holiday Inn outperformed the other hotel chains in China. Investigating the management of personnel in international joint ventures in Hong Kong and China he stumbled upon the so-called "overseas Chinese" as middle managers (Fung, 1994). These expats turned out to be vital for a reduction in an employee turnover rate. They were able to build up trust between Chinese employees and Western top managers. They managed to generate commitment by being able to navigate between two alternative rationalities, two cultural softwares. They did so, because they were equipped with two sets of cultural softwares and they knew how to "translate" them in an organisational context. They could interpret one set of values in terms of the other. For instance, personal obligations could be translated into contractual relationships, and vice versa (Magala 2000).

In order to investigate this concept of mediators in an international context, it is useful to return to the anthropological base where the concept of 'brokerage' appeared before it was absorbed into analyses of networks and organisation.

4.5.iii   Background to the concept of socio-cultural brokerage

The term 'culture broker' is known mainly in the area of applied (action, agency or practice) anthropology to describe people who are able to bridge cultures, and who essentially act as agents of change. Originally, the term was used almost exclusively to refer to the way political and economic changes may occur. Adrian Mayer (1967) draws an important distinction between patrons and brokers - Patrons are people who dispense first order resources e.g. land, jobs, scholarships etc. A broker dispenses second order resources i.e. strategic contacts to people who control such first resources directly or who have access to such person. The concept of culture brokerage then, has explicitly been used to consider power relationships and this association has perhaps impeded its

adoption as a more general concept of cultural mediation. The anthropologists who used the concept of brokerage (Wolf 1966, Bailey 1969 and Long and Roberts1975) understood culture as being constantly created and renewed, and more accurately viewed it as a process than an entity, with man seen as a manipulator. Action anthropologists look not only at how a culture broker influences and interprets between cultures but also why he does so, and what he (or they) gains from the interaction. In many ways, this active concept transfers very well to the environments of global business and compliments the employee as an interactive player in learning organisations.

In order to examine the way culture brokerage may act as a mechanism in sensemaking for expatriates, it is useful to examine a working definition of culture brokerage. Boissevain (1974:7) has closely examined social Brokerage as part of network theory to look at "the range of social forms usually dismissed as informal organisation. Instead of looking at man as a member of groups and institutional complexes passively obedient to their norms and pressures, it is important to see him as an entrepreneur who tries to manipulate norms and relationships for his own social and psychological benefit." He describes these brokers as expert network specialists, acting as entrepreneurs, manipulating resources for their own profit. To some extent, all men in Boissevain's model are potential brokers, and social configurations are networks of choice-making persons competing for scarce and valued resources. By suggesting all men might be brokers, Boissevain avoids looking closely at what he terms 'the true motive of social action'. This avoids a facet of 'brokerage' that has also produced considerable attention that is concerning the hermeneutic difficulties in the role of culture broker (Geertz 1984). Boissevain's (1974:148) concept of a 'social broker', perhaps particularly appropriate to expatriate networks, is as follows: A social broker 'places people in touch with each other either directly or indirectly for profit'. The profit motive may be latent or manifest and the reward may vary in type. A broker's capital consists of his network of relations; his tariff is the value a broker derives from the transaction in goods, information, status, personal satisfaction etc. This tariff is rarely paid at the moment of transaction and is rarely specified. A broker will try to maintain his credit (actually this consists of what others think his capital to be thus they are dealing in expectations and hope). It is in the interests of both parties to underpay or overpay, thus keeping the transaction open. Boissevain

suggests it is easier for a broker to increase credit than a patron, because his resources are invisible. As interest the broker does not take the return service, which is his fee, but the possibility of deciding when and what that service will be.

To start a career, a broker must first cultivate a need for his services and must then build up credit by producing results. The ultimate aim of the local broker must always be to develop his own range of contacts who control first order resources so that he does not have to work through other brokers, for as long as he does so, he is dependant upon them. A broker may wish to convert his second order resources into first order resources, but to do so is risky. He has to be able to make first order resources available, and if he fails to do so, his credit diminishes rapidly. Boissevain says a person may become a broker depending on the structure and content of his social network (including centrality, time, and power,) and his willingness to use this for personal gain.

Both social support and mentoring have been shown to have some effect on expatriation and socio-cultural brokerage can encompass both these types of intervention. Socio-cultural brokerage makes explicit an element of trade or some form of self-interest in the role of exchange in bringing understanding to compatible experience. It embraces the elements of opportunity and accessibility as crucial factors in the sensemaking equation. Such brokerage does not explicitly determine whether it needs to be played out between individuals, in a particular setting or with a regard to hierarchical positions of players. In this way it emphasises the interplay between individual characteristics of expatriates and situational factors in their work and living environments.

People who are able to adopt a brokerage role in an expatriate situation may accelerate sensemaking in such situations. This is because through their actions they influence access to and availability of the social properties of sensemaking. Though the social property of sensemaking can be carried out with imagined actors and audiences, greater access to real-life social contacts provided by brokerage can be expected to aid sensemaking.

4.5.iv. Application of socio-cultural brokerage to expatriation

How then does this concept transfer to the expatriate environment? Dennis (1994:303) gives an insight into how the concept relates to expatriation in a very personal account of culture brokerage. " What is it like to actually be a culture broker? From 1989-1991 I

directed a Latin American study abroad program for a consortium of US liberal arts colleges. My job involved living in San Jose, Costa Rica, with my family, and directing the daily operation of the program. I also visited the colleges and the central US office regularly. I had read about culture brokers, dealt with some of them in different cross-cultural situations and written about them. Now I was one, acutely aware of the role I was playing, all day, every day." This article is important firstly because Dennis makes obvious the link of culture brokerage with expatriation. Secondly, he does so in a way that Weick (1995) advocates in sensemaking studies, using stories and personal input. His own brokerage spans not just geographical and cultural borders but by personal input he also acts as a mediator between the fields of expatriation and academic study. Dennis concluded " The most important thing I learned about culture broking was very simple: that promoting positive personal relationships between different groups allows problems to be worked out successfully."

Mediation or brokerage exists within expatriate experience firstly on an economic basis. The role of mediation in a business setting is well established. In advocating strategy for cross-cultural negotiation in situations where participants have low familiarity with their counterpart's culture, Weiss (1994) advises the use of both agents and mediators. He first considers the situation of agents operating at corporate level "Between 1983 and 1986 IBM prepared proposals for a personal computer plant for approval by Mexico's National Commission on Foreign Investment. The company hired Mexican attorneys, consulted local experts such as their American Chamber of Commerce and US embassy staff, and met with high-level Mexican Government officials. These advisors provided information about political and social cultures and the foreign investment review process, access to influential individuals and assessment of the leanings of key decision makers on the commission".

Weiss then looks at the position of mediators…"go-betweens, middle men , brokers and other intermediaries operating at a more personal level but still on an economic basis. " A mediator may also emerge, as happens when the 'introducer'(shokaisha in Japanese) who first brought the mediator to the counterpart continues to play a role , or in the team-on-team negotiations, when an individual involved in the talks who does not initially have authority as a mediator, such as an interpreter, becomes a de facto mediator in the course

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of the negotiation. Such cross-cultural mediators should be at least moderately and preferably highly familiar with the cultures of both parties. In the 1950's an American truck manufacturer negotiated a deal to sell trucks to a Saudi contractor because of the intermediation of Adnan Khashoggi. Khashoggi, the son of the personal physician of the founder of Saudi Arabia had met the manufacturer while in college in the United States and learned about the contractors needs upon returning to Saudi Arabia. This was his first 'deal'. Long before his involvement with Lockheed and Northrop" (Weiss 1994). Outside the direct business environment and concentrating on the non-business life of expatriates, mediation also plays a part in economic terms. An organisation may provide expertise to an expatriate employee e.g. to educate in the ways or customs of a country, to look for appropriate housing or education in the new home, to help investigate work possibilities for partners in the host country, or to help develop appropriate language skills or to mentor staff in the workplace. All provide means of giving meaning and understanding to the novel situation.

Cross cultural training and relocation assistance by professionals is a form of brokerage. It fulfils the roles of local interpretation schemes and the influence of others as recommended by Louis (1980). It has become incorporated as best practice for expatriate provision whether provision is outsourced as with intercultural training (Brewster and Pickard 1994) or in house as in Reeves Ellington's role as a trained 'insider' anthropologist working for Pharmco (1993). Although it has a complicated relationship with the forming of expectations such training may aid sensemaking by providing access to other peoples local interpretation schemes and past experience. In these cases, the tariff is clearly commercially applied. However, informal brokerage has long played a role in expatriation where the tariff is paid in intangible rewards, and indeed, the global relocation industry has largely grown from attempts to offer consistency of help based on informal aid provided previously by volunteer institutions and individuals. Many expatriates substitute or supplement the formal offer of interpretive services outlined above in informal ways. Often these are provided through informal expatriate organisations, through neighbours, colleagues, or within their own family group. The goods that are being exchanged in this situation are information, contacts and services. These 'goods' carry the means to address surprise experienced in an expatriate situation. It

is in this way that meaning is constructed and transmitted in the multifaceted expatriate experience.

The establishment of a support and reference organisation such as Shell Outpost has been heralded as a major combination of company resources and the volunteer efforts and expertise of Shell expatriate partners (Soloman 1994). Tayeb (1998) describes precisely how this transition between informal and formal brokerage can occur. In her study of NCR Dundee, she quotes an NCR manager explaining how he supplemented help and support for incoming expatriates 'on the basis of his own experience'. " I was trying to find the best way to provide support for the families and for the expatriates. So what I actually did was, I hired an expatriate wife, so she works for me. She has already been through the experience and the problems of getting used to living here. It's her job and her responsibility to help other expatriates settle into life..." (Tayeb 1994: 432). This fits very comfortably with Louis (1980) assertion: "Practices that facilitate relevant and reliable information aid sense making. Specific information is made available according to newcomers needs rather than in advance… The information comes from someone who knows and is willing and able to share a particular part of 'how things operate around here'".

Socio-Cultural brokers in an expatriate situation operationalise the strategies suggested by Louis (1980) in her sensemaking model. As 'on the spot experts' they intervene at the time of surprise, which is natural and innovative, to help inject meaning, rather than attempting to prevent surprise. They may help an expatriate make sense of events which have just unfolded. This helps the expatriate to find meaning in the surprise, rather than attempting to avoid or reduce surprise by the use of anticipatory preparation and training. Osland and Bird (2000) have most recently suggested a cultural sensemaking model (Fig.4.3). In this model, making attributions is seen as drawing inferences based on identity and experiences… echoing Louis'(1980) general personal characteristics and past experience inputs. They introduce 'cultural mentors'; a concept very similar to socio- cultural brokers.

They suggest that 'cultural mentors' " are a hybrid of vicarious and personal attributional knowledge –a sort of live cultural assimilator… Reading an explanation from a book or working through a series of cultural assimilators is different from receiving an

explanation of an expatriate who has personally lived through and now wishes to understand. Cultural mentors can correct inaccurate hypotheses about the local culture" (Osland and Bird 2000:73).

Fig 4.3. Osland and Bird's (2000) Cultural Sensemaking Model
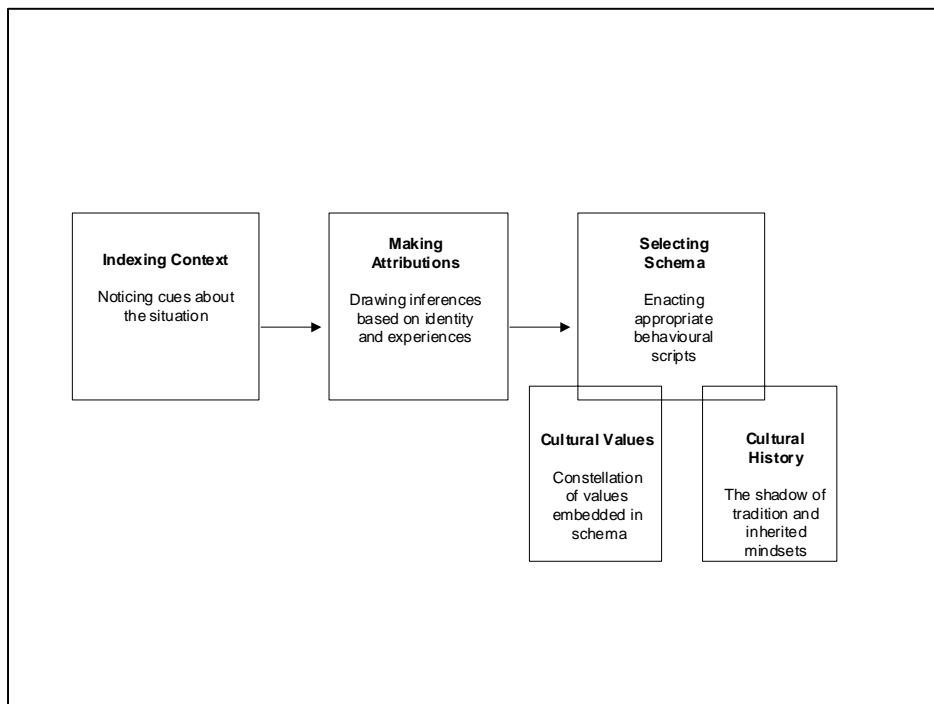
These intermediaries are people who are able to deal with cultural paradoxes: those situations where the cultural norms and values are other than might be predicted by a basic understanding of the culture. They suggest the interplay of cultural values may be metaphorically seen as a card game. Each card represents a particular cultural value. People understand the values of the cards, but in certain situations, a particular card takes precedence or trumps others. In this metaphor, cultural mentors understand the rules of the game and can teach these to others who also wish to play. But most importantly, they are experts in understanding and explaining when a particular card or set of cards (a particular values or set of values) trumps or overrides others unexpectedly. In their model

(Fig5) cultural mentors can intervene using their understanding of cultural values and cultural history to help expatriates select appropriate schema.

Socio- cultural brokers foster links between newcomers and insiders - it is in their interests to do so, as this increases their sphere of operation. They can provide formal and informal feedback on a running basis to reduce uncertainty, considered important by Brett (1980) who suggests the primary process in relocation adjustment is that of reasserting control through uncertainty. Finally culture brokers can provide some understanding of the sensemaking process itself at times of transition being given to newcomers. In practice, this is rarely done explicitly, but is often carried out informally by means of comparative stories, previous histories, and accounts of what are recognised responses to various situations. Because of the complex nature of the expatriate situation, such socialisation processes are difficult to track and may be sporadic in application but they exist to a greater or lesser degree for individual expatriates.

It appears from the anecdotal evidence above that brokers can influence how expatriates respond to their changed circumstances, acting as a conduit for interpretation schemes and actively helping expatriates to bestow meaning on their situation. Although a clearer image of socio-cultural brokers has been given, measuring their influence and activity in a quantitative way is more difficult, especially as their original identification lay firmly in qualitative methodology. The most relevant measures so far developed unfortunately do not cover social cultural brokerage in total but rather only one aspect of it; mentoring, e.g. how on-site mentoring impacts expatriate socialization using a structural equation modelling approach (Feldman and Bolino 1999). Mentoring however, addresses the receipt rather than the donation of brokerage and these can be seen as two interactive facets of the socio-cultural brokerage concept. Thus an attempt must be made to develop a quantitative measure of brokerage as a rounded concept, since there is no such item available in the literature, and this attempt is discussed in Chapter Six.

4.6   POSSIBLE IMPLICATIONS OF SENSEMAKING FOR PRACTICE IN THE MANAGEMENT OF EXPATRIATES

This thesis studies the sensemaking role in expatriation. Such an approach may have considerable implications for organisational management of expatriates. On the one

hand the aspects of sensemaking such as personal characteristics and past experience are applicable most perhaps to the selection process but that selection is known to be often based on technical needs and also becomes a complicated process involving the whole family. Personal development and learning programmes address the more individual aspects of sensemaking, but it is the social inputs of influence of others and local interpretation schemes – the brokerage element which is perhaps most accessible to an organisation. To what extent do organisations massage brokerage? Many organisations organise mentor programmes or other support systems within their expatriate provision. These are most tangible and explicit in the organisations providing family support such as Shell Outpost, Unilever Expatriate Network, The World Bank Volunteer Services, Schlumberger's internet initiative. Other organisations use outsourced training and relocation provision representing avenues of brokerage. If surprise consequent on expatriation leads to a review of 'mental maps', brokerage may help act as a guide in reconstructing understanding of the terrain. In this regard, availability of brokers, access to and openness for brokerage should all affect the ability to restructure understanding. In their research into expatriate training, Brewster and Pickard (1994) noted that training appeared to be more effective in places where there were large expatriate communities. They point out this may be because training is directed to operating in such communities. It may also be that in large expatriate communities brokerage is more easily accessible to both interpret and to validate training.

Organisations attempting to provide positive emotions associated with interruption (expatriation) for employees within the sensemaking model are facing an uphill task. Weick (1995) suggests in a relationship, positive emotions are generated in two ways over time, either by the removal of interrupting negative stimuli or by the ability to accelerate completion of plans. While both of these appear within the grasp of an organisation, in order to generate positive emotion, these interventions have to be unexpected. " The implications of these propositions about positive emotions for the development of relationships is sobering. As the other person (party) in the relationship becomes more predictable, and as a partner expects that person' (party)'s help, there should be fewer occasions for positive emotion to occur." (Weick 1995:47).This implies some tension between the suggestion that constant, regular expatriate provision may well

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contribute to an expatriate's comfort, but over time, the ability of this alone to produce positive emotion will reduce. Organisations will have to learn and bring about systems that can engender unexpected intervention to accelerate plans or remove negative stimuli. There are also implications for timing. Among the four practical strategies to aid transition in an organisational context Louis (1980) suggests is 'Intervention at the time of surprise, which is natural and innovative, to help inject meaning rather than attempting to prevent surprise'. Forster and Johnsen (1996) show an emphasis in the management of expatriation being placed on preparation and arrival yet literature suggests that the most difficult times for expatriates occur some months after arrival. Pre-departure provision may help foster of the concept that the employing organisation has the best interests of its expatriate workers at heart. However sensemaking theory would tend to suggest 'anticipatory adjustment' is unlikely to be possible as it is in the nature of the sensemaking process to be retrospective. Reflection is required to bestow meaning. Helping expatriates develop realistic expectations may well be helpful. One aspect should be guarded against though, and that is to suggest to prospective expatriates themselves that 'culture shock' can be avoided. This is sometimes forwarded in marketing literature for courses and pre- departure provision. To do so is to set up an expectation that if unmet, according to theory above, will actively contribute to discomfort. A salutogenic perspective illuminates some dangers of unrealistic expectation. Taking language provision as an example, with a pathogenic model, inadequate provision delays the path to comfort. In a salutogenic model, it increases the path to disorder. For some people wrongly timed language provision may increase feelings of alienation and failure, and their sensemaking response may be that language skills required for the work are beyond their grasp and will never be sufficient to be happy on assignment.

 Still relatively little is known about what it is about international experience that is formative… which aspects particularly stimulate the learning and enrichment which are seen as so desirable in international recruitment. Attempts to allow people to gain international experience in some shortened or 'sanitised' form through project work or through 'strike force expatriate assignments' (Harvey 1999) designed to reduce disruption might not provide the formative experiences of confronting emotions engendered by having to cope with surprise on a more long term basis – though will

inevitably produce their own set of characteristic surprise elements such as the intermittent spouse syndrome described by Kahn (1997)

As far as sensemaking is concerned, the mechanism itself does not proscribe either accuracy or desirability. Plausibility is more important than accuracy in influencing action. Weick (1995: 153) "if we return to organisational settings we can assume that the changing mix of people solutions and problems through constantly changing decision opportunities thrust up by an unstable competitive world, means that most people, most of the time cannot afford the luxury of accuracy. Instead their goal is to establish some sort of stability and predictability under conditions that work against this goal". If someone has made sense of the situation inaccurately or in a way that is undesirable to the organising body, that's just the way it is. In the absence of accurate information, sense will be made on the basis of available information. The accuracy of input for others is immaterial until such time as the knowledge of others becomes manifest to the individual. On becoming aware that the understanding of others is different, creating a dissonance in understanding, an individual's process of sensemaking is triggered once more.

If no surprise is encountered, people have no need to review their 'mental maps' and will continue to make sense of their situation based on existing understanding. If inaccurate or inappropriate understanding remains unchallenged organisations bear some responsibility for the consequences. It may well thus be to the advantage of organisations to attempt to influence the input of others and local interpretation schemes to enable people to make sense of their situation in a way that actively promotes the company's ethics and values and makes these explicit.

4.7. CONCLUSION

Having looked at how sensemaking is triggered by surprise in Chapter 3 this Chapter has identified two potential sensemaking elements in expatriation – Socio-cultural brokerage and Sense of Coherence and considered their associated research literature. It is suggested these are elements that can act as moderators for expatriate sensemaking. The implications of sensemaking for practice in the management of expatriates were then considered briefly. It is now important to move to the central objective of this study, to consider how the surprise triggered by expatriation may be affected by the sensemaking elements described above.

CHAPTER 5: EXPATRIATION RESPONSES AND THE APPLICATION OF A SENSEMAKING PERSPECTIVE

5.1   INTRODUCTION

The aim in this Chapter is to establish what happens as a result of sensemaking and by tying this to the theory and literature explored in Chapters three and four to complete a paradigm for this study. Chapter 3 explained that sensemaking is ongoing. This has an effect on what is considered to be the 'outcomes' and dynamics of the process, raising particular methodological issues for any study based on sensemaking theory. What constitutes an 'outcome of expatriation' lies at the heart of this study as this is the driver to search for an alternative sensemaking perspective on expatriation. As a means of setting down the research questions of this study, the theory relating to the understanding of 'outcomes' in sensemaking terms is explored in this Chapter. Inevitably this leads to an investigation of the dynamic process of sensemaking. This is the final area of theory to be examined enabling the theoretical model and hypotheses of this study to be revealed in Chapter 6.

5.2   ACCULTURATION RESPONSES AND 'OUTCOMES'

A number of attempts have been made to describe how an individual's reaction to expatriation appears in practice. In looking at 'types' of expatriates, expatriate literature has identified matrices which identify 'transfer archetypes'. These include terms of assignment orientation after 10 years (Harzing and Borg 1996), 'modes of acculturation' (Berry 1992: See Fig 5.1) and 'expatriate allegiances' in terms of the parent firm, the local operation, both or neither (Black and Gregersen 1992) in terms of career achievement (Fukuda and Chu 1994), and cross cultural citizenship types based on value orientations (Fish 1999).

Initially it would seem such categorisation is inappropriate for a sensemaking approach to expatriation . Strictly speaking, in sensemaking terms these cannot be considered 'outcomes'.

Responses in sensemaking terms are the stages in the process where understanding has influenced action. These are times when interpretative schemes have found some sort of

expression in action and attitude. The resulting enactive environments are constantly in the state of becoming. Disconfirmation of an existing interpretation requires a revised scheme to take its place, and this in turn will affect actions.

Fig. 5.1 'Modes of acculturation' From Berry 1992

	GOOD CONTACT WITH HOST COUNTRY	LITTLE CONTACT WITH HOST COUNTRY
GOOD CONTACT WITH HOME COUNTRY	Integration	Separation 'Heart at home'
LITTLE CONTACT WITH HOME COUNTRY	Assimilation	Marginalisation 'Free Agent'

If expatriates regard themselves as e.g. 'global nomads', 'trailing spouses', 'dual career couples' or 'third culture kids' this will affect future actions and colour recollections of past experience.

But this general frame will be subject to further review when expectations are challenged by new input over the course of expatriate (or possibly repatriate) experience. A 'free agent' may well change to become a 'heart at home' expatriate in the face of serious illness for example. A 'heart at home' expatriate may experience repatriation in a way that leads them to seek further terms abroad, an assimilated expatriate might find their allegiance questioned in a situation of local conflict or security problems etc. Using a sensemaking model the expatriate can be seen to be continually reassessing their circumstances in the face of new experiences. This in turn may lead to their redefining their satisfaction with their current situation and their future requirements and

expectations. Sensemaking allows for complex changes in adjustment and acculturation not just as more information, understanding or ease of living becomes available, but in response to the meaning given to such stimuli by the expatriate.

In fact in the complexity of a sensemaking model, it is to be expected that a range of responses and referents will be in operation at any one time. It will be the way these intertwine that, for the moment, determines a more general framework like those above. It may well be that satisfaction with an expatriate experience does not relate highly to feeling at home in a country. Future intentions to expatriate may not relate to present adjustment on an expatriate assignment. But the interlinkages of such factors build to provide a transient acculturation framework in which the expatriate may gain meaning in their experience and though this a little of the process comes to be understood.

These transient acculturation frameworks provide understandable concepts against which expatriates can test their experiences and as such become tools of the sensemaking process. Existing expatriate literature accepts that they are generalised terms made up from the interplay of complex factors. Brett (1980) for instance pointed out that adjustment to a foreign posting does not necessarily mean that people like their situation. These factors may also change over time. Fish for example suggests: ".... it is unrealistic to argue that all managers maintain traditional value patterns, particularly in the long term. More importantly, it is unrealistic to argue that traditional values are maintained in all possible circumstances under all possible conditions, whilst a difficult process, personal development and changed circumstances or stimuli will evoke changes to values in some people." (Fish 1999:473).

Louis (1980) says newcomers are ill equipped to make sense of the myriad surprises that potentially accompany entry into an unfamiliar organisation, and suggested they would benefit from a greater understanding of the nature of entry experiences, the implication being that making sense of a situation is to be encouraged. There is however a word of caution in this. Sensemaking applies to complex fluid situations precisely because it can accommodate complex fluid responses.

Richards (1997:567) give a good example of how sensemaking in practice results in responses that are not always seen as helpful. He says, " It has been argued that the expatriate feels and indeed is excluded from interaction with the host community, and

this exclusion contributes to the development of mild or serious paranoid patterns of behaviour. This is a largely rational response to the ambiguous experiences which expatriates encounter and to the perceived threats which the host culture provides to the identity of the sojourning expatriate." An expatriate who sees difficulties and problems as residing in others may be making as much sense for himself as the expatriate who is struggling with what he sees as his own shortcomings in trying to integrate.

Richards (1997) quotes an Australian teacher employed on a three-year government contract in Brunei as an education officer on a certain salary level. On arrival he determined his salary was inequitable and submitted an application for a salary review that then took many months, finally resulting in a nominal salary upgrade backdated to the day of appointment, two years after appointment. 'This expatriate was nonplussed by the experience, but was groping for an explanation.' Richards quotes this expatriate negative feelings arising " because of the open discrimination I felt was being applied against me in this case. I could not accept that even blind bureaucracy could act so inconsistently and with so much slowness: I had accepted the normal speed with which this country's bureaucracy operated but was not prepared to accept it in this case. Two years was a long time to get a decision which was so straightforward based on the evidence in the submission. Furthermore there [were] indications by some of the officers I dealt with of an anti-Australian attitude with respect to qualifications and experience; this I tolerated in order to resolve the issue." The issue of 'truth' or 'paranoia' in this case is cloaked by the sense given to the situation by the individual involved. This was his reality according to the meaning he bestowed on these circumstances.

This study thus recognises it is possible to suggest in making sense of their situation, an expatriate comes to understand aspects which will both increase and decrease happiness with an overseas assignment. They may come to make sense of the situation through learning the ways and structure of a new country, modes of operation at work, new techniques and abilities, different modes of learning and thinking, the benefits of improved financial status and of relationships with others of different backgrounds. But the sensemaking process can have other implications. They may also gain an understanding that the expected promotion is unlikely to occur or colleagues in the home base are progressing more quickly. They may find the demands of their extended family

can no longer be accommodated during an overseas assignment, their teenage children are now reluctant to stay in the land of expatriation, or present travel demands are such that they can just as easily live in their home country. They could decide "all the company wanted was a warm body to watch the money" as on reflection a Canadian expatriate described her work experience in Bangkok (SD.13).

Nowhere is this more evident than with hindsight on repatriation. Consider the following quote – " The problem as I see it with the company's talk about international managers is that they were just paying lip service to it. When I applied for the posting to Malaysia in 1992 they gave me all this stuff about the assignment being a really good career move and how I'd gain this valuable international experience and so on ... and, don't get me wrong, we really enjoyed the posting. We loved the people and the culture and the lifestyle and when it came to going back to the UK, we weren't really all that keen.

The problem was that whilst I had been away, the company had undergone a wholesale restructuring, including losing about 15% of the work force through redundancies. This meant that when we got back, my job had effectively been removed so after three months in limbo, I decided to leave that company and that's where you find me today - unemployed, although we are looking at a contract job in the Middle-East with Vickers. Thinking about it now, my previous employer wanted a job doing and they sent me out to do it, but all that talk about developing me as an international manager was just window-dressing. Engineer 37, married, 3 children." (Forster 2000:137).

In sensemaking people are seen as very much part of their own environments. Through their actions, they create the materials that become the constraints and opportunities they face. Weick suggests " the sensemaker is himself or herself an ongoing puzzle undergoing continual redefinition, coincident with presenting some self to others and trying to decide which 'self' is appropriate. Depending on who I am my definition of what is 'out there' will also change" (1995:20).

In this way the frameworks individuals employ serve to define and construct what happens to them. These frameworks can for example include a framing of expatriate experience as entirely 'normal' - congruent with the life of people not experiencing expatriation.

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'Life as an expat is not always as different from life at home as we would like to think it is. Friends at home can find it hard to believe that the expat life is not one of constant glamour, holidays and excitement. But expats usually live their lives in much the same way as they did at home, with all the cultural attitudes and tastes that they grew up with -- not those of the country they live in.

I left the UK almost 10 years ago. I was single and I wanted a change in lifestyle, career and location and I definitely found those changes. I am now married and we have two children, both of whom were born abroad. Instead of being an engineer I am now a freelance writer. Since leaving Wales, I have lived in England, Hong Kong and Turkey and am looking forward to moving somewhere new this summer.

Because of these major changes, my life abroad bears little resemblance to the life I led before, but there are many parallels in my international life to what my life would have been had I stayed in my home country. But my friends in the UK have also married and had children, changed careers and lifestyles and moved away from home, though all within the same country.

For all of us, daily life revolves around our work, our partners and children, and the routines necessary for maintaining a happy family household and creating the lifestyle we want. We all go shopping, drive a car, work on the computer and juggle the requirements of children and too much work.

The differences in my life are, for the most part, more cosmetic than structural. I still shop, but in a different language. I still work, but with colleagues from numerous countries and cultures. I still have a home, though the building style may be different to what it would be in England.

My children go to school, but they play and learn in two languages. I socialize with friends, but they are from all around the world instead of from the other side of town. I go on weekend outings, but I go to King Midas' tomb at Gordion, not to Stonehenge.'(Francis 2001).

Weick accepts the methodological problems this causes but suggests noticing, manipulation, interpretation and framing are all legitimate ways helping others understand the actions of people in everyday life. Referents and accounts are given when a moment in the process of evolving is frozen. What is captured as an 'outcome' of

sensemaking is just such a frozen moment. He suggests to try and understand sensemaking it is necessary to try and use multiple gauges to gain some understanding of frameworks in use. The most accepted frames of reference available for these 'outcomes' presently lie in the adjustment literature. This study has attempted to apply a number of measures that have been used to track expatriate responses to expatriation over the course of one discrete experience and relate these to the sensemaking elements of sense of coherence and socio-cultural brokerage described above. They are well tried and accepted and despite their inability to reflect possible sudden and overwhelming revision of meaning provide a glimpse of the framework currently employed by an expatriate at the time of testing.

It is possible to draw on the adjustment literature to measure this basic ability to operate by social integration and adjustment scales. It is accepted that adjustment to fitting into the culture or acculturation may not be a final goal. However, if an expatriate has to live and work in a country for a lengthy period then they will need some basic ability to operate in that country. This study believes measures of social integration, adjustment and satisfaction give a measure of felt ability to operate as a manager (or MBA student) in another country - an ability to operate at the most basic level in a different community.

At the same time the interplay of these measures may vary according to how an expatriate is readjusting their frameworks to make sense of new input over time. This is especially so with the sample in this study. It is fair to imagine not all MBA students will expect or wish to acculturate completely to a Dutch way of life on an 18-month course.

It is not necessary to think and feel and act like a Dutchman to study happily for an English language MBA in Holland. But it is likely that some form of ability to operate on a daily basis will contribute to a transient framework of acculturation. An integration scale measuring basic emotional operating skills and an adjustment scale measuring basic skills needed to maintain life in a new environment, together with simple questions of general satisfaction with life may provide a gauge of sufficient complexity to take a snapshot of acculturation responses. That is not to say these measures will provide a fixed and unchanging outcome of adjustment… rather that they will show the interplay of

integration, adjustment and satisfaction over a period of time in varying circumstances - for instance between when students first take up their course with the prospect of 18 months in a new country contrasted with the pressure to find employment at the end of their course.

5.3   A DYNAMIC PROCESS

If expatriation is considered salutogenically (as described in Chapter 4), it can be seen certainty about an overseas experience appears greatest at the start of the assignment. This is in contrast to the perspective of adjustment studies where assignments are seen to be most uncertain at the start. While it may seem these two perspectives are diametrically opposed, rather they are expression of adopting differing levels of abstraction.

 For new expatriates, the start of a single assignment will usually be accompanied by day-to-day lack of certainty and it is this that is highlighted in adjustment studies. More experienced expatriates are likely to build expectations of a period of settling in which they project will include confusion and bewilderment. This day-to-day uncertainty is predictable, even though the process of living through it can be extremely uncomfortable. At a higher level of abstraction, the further an individual moves from the present, the less predictable the surrounding world will be. At the start of the assignment, there is some given understanding about what the contract says, the home and family position as currently constituted, the expatriate's existing hopes and wishes about what the position will bring. There will often be a real or imagined idea about length of placement, tasks involved, what the placement will be like and any future with the organisation. The decision has been made on the basis of present understanding, and this represents a level of certainty in sensemaking terms. Over time, it can be expected that the assignment will be subject to the influence of random unpredictable factors. This can be considered by the narrative of an expatriate who has already been introduced in this study in section 3.1 (SD5). If this expatriate is tracked, these unpredictable influences become clear. His first experience of working abroad ended in the redundancy described in Section 3.1, his return from Singapore was prompted when the project he was working on (the import of latex in flexi-tanks to the former USSR) collapsed in 1986. The project lost financial viability when the differential in the price of drummed versus container latex suddenly

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and seriously widened. The reason for this unexpected surge in container latex price was the emergence of AIDS and the recognition that condoms were the only known protection against the spread of the disease. The firm that acted as agents for the former USSR and the need for project staff in the company was further decreased as Glasnost opened the country and past relationships and contacts no longer gave a competitive advantage to business in the area. This is a good example of how world events can contribute to unpredictable end to an expatriate experience. What is harder to predict is what reaction this will provoke in the expatriates themselves. In the above case, the expatriate returned to his home country. He found work quickly and apparently settled into a domestic career. However " I was promoted at work but my boss said there would be no extra money for the additional responsibility for several months…and that discussion ended with him saying 'if you don't like it you know what you can do'. Normally that would have been the end of it but then by chance a colleague showed me an advert in the Public Ledger, a trade paper containing trading jobs. The advert was a good opportunity for me in a Dutch company. I saw the interview as a chance to visit Holland for a weekend and pick up a couple of bottles of duty free booze. When I went to the interview and was asked what my pay should be I gave them an answer that sounded a bit like telephone numbers to me. I suddenly realised they were taking me seriously and that became the start of 11 years in the Netherlands." (SD5)

Random unpredictable factors begin immediately with the expatriate's perception of their new culture (bearing in mind sensemaking is retrospective by nature). In this way, adjustment can follow a normal U curve, but as one potential outcome in the chaos of future uncertainty. Beyond adjustment factors there can be major changes to the family, the organisation, tasks and responsibilities, location for day-to-day business etc. All could impact direction or meaning given to any adjustment tasks, not just as hiccups but also as fundamental reasons for the expatriate to re-evaluate their position. The resulting disorder should not be equated with the assignment breaking down. It could equally be seen as one of the following: Promotion to a new assignment, the (planned or unplanned) departure of the employee from the organisation, assimilation within a group move, a change in the structure of an assignment to accommodate a split family, or paradoxically, the change in the structure of an assignment to permanent status. The crucial factor is that the end result

is accepted to be uncertain at the start of the assignment, and subject to random unpredictable influence. Such disorder and uncertainty is reflected and created by the diversity of individual expatriates, their families and their relationships with employing organisations.

In their model on organisational sensemaking in strategic change initiation Gioia and Chittipedi (1991) emphasised how phases in a sensemaking cycle correspond to periods dominated by understanding and influence respectively. A dynamic fluid process, sensemaking differs from the way models of social learning and uncertainty reduction have been previously applied in respect of expatriation. Rather than seeing the experience of expatriation as incremental, moving toward some distant ideal goal, sensemaking allows both for such incremental learning and for situations where all previous learning might be overturned in the face of new input. It is useful at this stage to return to the experience of the expatriate manager in section 3.4 (SD7) of this study who chose to reject an offer of promotion with his current company when they had failed to notice he had stopped working awhile on expatriate assignment. He subsequently took up a position in his home country that gave him responsibility for the management of plant safety. Very shortly after he took up his new position there was an industrial accident in that factory. This meant for a number of months he lived with being accused of possible criminal proceedings against him because of his position within the company. He has now left this company and now runs his own consultancy, still in his home country. At the time he left his expatriate assignment, he was sure this was the right decision. Subsequent events caused him to reconsider this. This gives an indication as to both the retrospective and dynamic nature of sensemaking. Recently the multinational with whom he carried out his expatriate assignment has brought in widespread redundancies among upper middle managers, and few of his expatriate contemporaries remain employed by them. This again becomes a cause to reassess his earlier decisions.

Weick (1995:15) says " to talk about sensemaking is to talk about reality as an ongoing accomplishment that takes form when people make retrospective sense of their situations in which they find themselves and their creations." An expatriate will constantly be building understanding of reasons and implications of that experience, based on inputs that he or she can also influence. The expatriate career of an employee with a large

multinational can show how disorder and uncertainty is part of the package, even when the employee takes a proactive approach to his employment. A young engineer was sent to the Netherlands on a two to three year placement. While abroad he was promoted to an all Dutch company environment and the family had settled in well. According to the U shaped curve, it could be said the family were adjusted to their stay, but the expatriate came to look to return to his home country. The reason he gave was that his wife wanted to return back home but in addition privately he said that although he had learned good Dutch, felt it was 'impossible to shine in a foreign language'. He returned home, through a sideways but politically astute move, and immediately began canvassing for his next promotion. Within two years, the family left for Bangkok as a major promotion for the employee, and enjoyed the expatriate experience of living in the Far East. Then as part of major restructuring in the company, he was offered a downward transfer or large redundancy payout. He chose to leave the company after some 20 years of employment. Here may be where Sense of Coherence acts on outcomes. The expatriate chose to use part of the time his payment allowed him to travel the world with his family, returning after six months to attempt to find work. A family letter detailing this time shows how he views the outcome:

'A pretty tough choice at the time ……….but one that is working out pretty well and recommended highly. Unconvinced? Then just think what many of you were doing all year. The sensible money is betting on ….. boring meetings, email, redrafting for the 10th time a 25 page report that no-one reads anyway, more email, an early morning trip to the airport, more email, a late night return trip from the airport and another project meeting that achieved zip. Sound familiar? (X) on the other hand has had best part of 6 months on "holiday" in Bangkok (plenty of golf, shopping, lazing by the pool and lunch with the Bangkok Ladies), learnt to scuba dive and has been on holiday to Sri Lanka, the Maldives, Australia and the USA before returning to the UK. ……..Probably the best bit is being able to recharge the mental and physical batteries and having plenty of time to have a good think about what you want to do with the next part of your life. (SD 16, 2003).

At each stage, and every stage, it is possible to see that a review of circumstances in the light of other possibilities informs and produces a review of outcomes. The expatriate

extracts clues to build frameworks that explain their circumstances and may accelerate revelation. These in turn produce their frameworks for prospective action. Peltonen (1998) suggests that, such frameworks become interwoven into coherent meaning by individuals. He suggests that 'expatriate experience is here neither a radical deprecation of new cultural layers of experience on top of old ones. Neither is it a test of developmental maturity…. Instead it could be seen as a change in the composition of selfhood, perhaps a minor rearrangement in what one is." It is precisely this potential affect on fundamental selfhood that mitigates against linear models of adjustment.

5.4 CONCLUSION

In this chapter there was a concentration on the dynamic process and results of sensemaking, to complete a paradigm of sensemaking in expatriation. A dynamic process raises questions about the applicability of linear models used in adjustment theory approaches to expatriation and provides the rationale for an examination of alternative model of expatriate experience. Such a hypothetical model and related hypotheses and will be examined in the next chapter

CHAPTER 6:   HYPOTHESES AND HYPOTHETICAL MODEL

6.1.   INTRODUCTION

This chapter incorporates the theory from all chapters on both expatriation and sensemaking in the construction of the hypothetical model and hypotheses that form the basis of the study described in Chapters 7 and 8.

6.2   HYPOTHETICAL MODEL

Fig.6.1 Relationships within the Hypothetical model
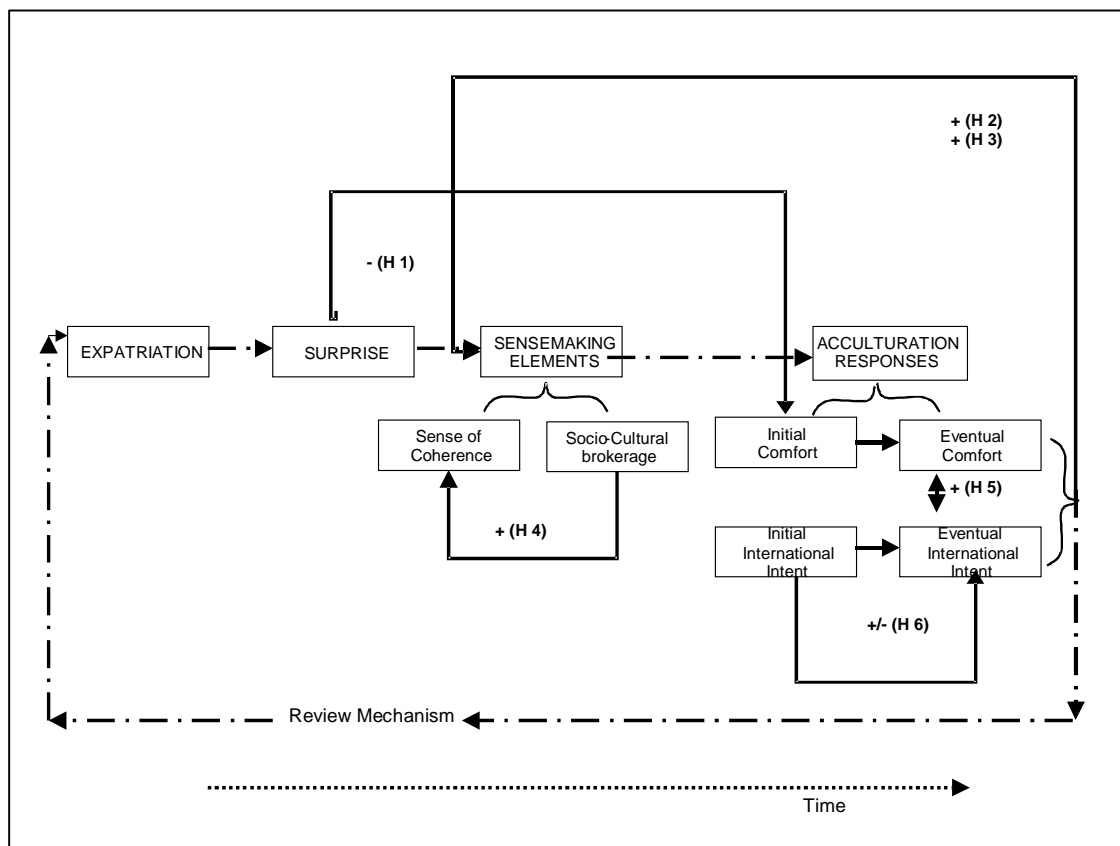
In Fig. 1.1 this study described diagrammatically how two elements fit into the dynamic process of expatriation as sensemaking elements, and this is elaborated in Fig.6.1 As with Gioia and Chittipedi's model (1991) in relation to organisational sensemaking in strategic change initiation, this diagram contains a continual review mechanism whereby the Understanding/ Influencing or Cognition/ Action processes are ongoing. This dynamism is crucial to the model. It stands at the core in progressing the thinking beyond more linear concepts of adjustment to include more unpredictable environments.

This study has seen how difference translated into surprise has a long pedigree in adjustment studies of expatriation(Section 2.3), how such surprise appears to trigger sensemaking (Section 4.1), proposed sensemaking elements that may influence sensemaking (Section 4.3), mapped acculturation responses (Section 5.2)   that may be part of a fluid dynamic process (Section 5.3) of reviewing how an expatriate makes sense of their experiences. How they make sense of their experiences whether comfortable or not may affect whether they are prepared to repeat the experience. Integration of all the suggested relations in the previous sections enables the construction of a hypothetical model, schematically represented in Fig 6.1. Distance and difference factors creating Surprise are the independent variables. The sensemaking elements (Sense of Coherence and Socio-cultural brokerage) serve as intermediate variables. The dependent variables are the acculturation responses of Comfort as measured by e.g. social integration, adjustment, satisfaction and the preparedness to repeat the experience as shown by International intent.

6.3   RESEARCH HYPOTHESES

Surprise is important to the study's model so it looks at the relationship between surprise and initial comfort. Previous studies on expatriation supporting the U-curve adjustment theory would suggest the greater the difference or surprise an individual meets on expatriation, the less comfortable they will be initially. This would suggest a negative relationship between initial comfort and surprise is to be expected.

H1.   An expatriate's initial comfort will be negatively related to surprise

The study is interested to consider if an expatriate is able to make sense of their experience, does this aid their satisfaction, social integration, adjustment – their 'general

comfort' or their willingness to repeat the experience of expatriation? Previous work on uncertainty reduction in expatriation would suggest this would be the case. However, what it is not known is if sensemaking proscribes comfort or a preparedness to repeat the experience. Following on from Louis' (1980) suggestion that sensemaking can aid newcomers socialisation it is hypothesised:

H2   An expatriate's eventual comfort will be positively related to sensemaking elements.

H3   An expatriate's eventual international intent will be positively related to sensemaking elements.

To some extent, if all individuals are considered to be brokers as suggested by Boissevain (1974), this study is interested to examine if that their general personal characteristics and past experience will have an effect on this. Are Sense of Coherence and Socio-cultural brokerage related? This study hypothesises that although these are mainly discrete items, a high Sense of Coherence will have a social element that may also promote brokerage skills and a positive relationship between the elements could be expected. Thus:

H4   Sense of Coherence will be positively related to Socio-cultural brokerage.

Is eventual comfort related to eventual international intent? Logic would suggest that if an individual is comfortable with an experience they will be prepared to repeat it, if not they will be reluctant to do so. Sensemaking suggests even if the experience is uncomfortable a person might be prepared to repeat the experience if they can make sense of why this experience was uncomfortable. This study will consider this relationship:

H5   Eventual Comfort will be positively related to eventual International Intent

The review process contained in the model suggests that individuals will be liable to differing responses over time. A change in response over time is also consistent with adjustment models. Sensemaking theory does not suggest a time scheme or pattern such as the U-curve as it could be that crucial input changes responses at any time. The study investigates if any variation in response occurred over time in the sample:

H6   Expatriate acculturation responses will vary over time.

6.4 CONCLUSION

Chapter 2 of this study explored the phenomenon of expatriation. Chapters 3, 4, and 5 constructed the theoretical base of the study. This Chapter combines all theoretical aspects into a hypothetical model and related hypotheses. These hypotheses are to be tested using multiple regression and related data analyses. While these hypotheses are central to the sensemaking model of expatriation, relationships between all major variables and variable components will be investigated and analysed especially with regard to comfort and international intent. The relationships within the model are explored in Chapters 8-10.

CHAPTER 7: CONSTRUCTION OF BROKERAGE INSTRUMENT

7.1 INTRODUCTION

This Chapter digresses from the central spine of the research of to elaborate on one area of the theory. Within the theoretical basis, two potential sensemaking elements were proposed as intermediate variables in the study. One, Sense of Coherence has a long research pedigree and required little further investigation. The second is Socio- Cultural Brokerage. In order to test the hypotheses of this study it was necessary to assess the extent to which that expatriates display the sensemaking element of socio- cultural brokerage. Socio-cultural brokerage is commonly measured qualitatively and so the task was to develop a reliable and valid instrument for this purpose. This chapter describes the development of such an instrument. The Chapter can be seen as a pre-study for the eventual research described in Chapters 8 and 9.

The practical application of socio-cultural brokerage in an expatriate environment is discussed in 7.2. The method used is described in section 7.3 that reports the development of the Brokerage scale. Results are reported in section 7.4. A brief summary and conclusion is given in section 7.5.

A description of the research method of the main study, utilising the instrument to measure socio-cultural brokerage described here, begins in Chapter 8.

7.2   PRACTICAL APPLICATION OF SOCIO-CULTURAL BROKERAGE

7.2.i. Openness to Brokerage

The theoretical basis of Socio-cultural brokerage was discussed in Chapter 4. Now its practical application in an expatriate environment is considered. The ability of an expatriate to use or offer broking skills will depend in part on the availability of other participants, information, material etc. These may be curbed by a variety of factors, such

as language, size of expatriate community, employing organisation, financial restrictions, political make-up of host country and so on.

The expatriate's ability to make use of brokerage will be limited:

1. By the actual availability of brokerage opportunities. For instance, remote areas may not have the wealth of information or experienced expatriate networks as source material and contacts afforded by regular expatriate destinations. Similarly, expatriates from a remote area may have difficulty finding information or contacts in a well-established location which reflect their understanding of the assignment e.g. in their own language. Any threats to physical safety or security are likely to temper an expatriate's willingness to follow brokerage opportunities and this has an influence in certain destinations or circumstances.

2. By the expatriate's perception of this availability. Partly because of the hit and miss nature of a great deal of expatriate preparation and distribution of resources, it may be that especially the naïve expatriate fails to uncover a rich seam of brokerage opportunities simply because they do not know what they need to investigate

Brokers are found in a variety of guises. Some may be paid, others unpaid. Some may be family members, colleagues, mentors, neighbours, fellow expatriates or relocation professionals. To bring the exchange into play, the expatriate will need to be open to the other party in the transaction, and this openness may be compromised or aided by how the expatriate views the other party. The work of Rogers(1995) on diffusion of innovations has further interesting implications with regard to this. He suggests information will be transmitted most easily when the receiver has a certain amount in common with the with the communication agent. In an expatriate situation this may mean an expatriate will look to a fellow novice expatriate rather than an experienced host national to explain and interpret his new environment. It can be that one important consideration in looking at openness to brokers will be the expatriate's perception of the broker's agenda. An expatriate may be more willing to give or receive information or help from a family member who is trusted and seen to be sincere than a colleague who is seen as a potential rival.

It is likely that certain personality traits may help openness to brokerage in a general way. Much attention was given in early expatriate literature to attempting to understand the

personal factors that may contribute or inhibit the functioning of individual expatriates on assignment. Generally these studies concentrated on individual personality and attitude characteristics. In particular the following concepts have been identified as having a possible relationship with overseas adjustment: Self-efficacy, or a belief in oneself to deal effectively with ones surroundings even in the face of uncertainty (Mendenhall and Oddou 1985), Empathy (Reuben 1976; Hawes and Kealey 1979) Self - confidence (Ivancevich 1969) Initiative and intelligence (Guthrie and Zetnick 1969) Cognitive and perceptual skills (Detweiler 1980). These individual characteristics that are seen to aid adjustment on expatriation (see also Section 4.2) contribute to an understanding of how personality factors may play a part in an individual being prepared to take on a brokerage role. However, the concept of culture brokerage allows for a very wide range of characteristics that contribute to its operation. Equally important then are studies investigating the ability to make and form relationships and the ability to display communicative behaviour (Reuben 1976) or other studies considering individual variables which might impede effective intercultural interaction - prejudice, stereotypes and ethnocentrism (Brislin 1981).

In particular, the characteristics involved are not necessarily those that contribute most to the interaction of an expatriate with host nationals, the most commonly cited parameter of successful integration. (E.g. Torbiorn 1982; Tung 1981; Black 1982,). It may be that an expatriate may not be particularly adept at empathic or communicative behaviour, but a member of the family has these in abundance and acts as an interpreter and mediator in a way that allows the expatriate to transmit their technical skills in the new environment. In this scenario for example, the family dynamics will be as important for the culture brokerage processes as any individual personality characteristics. So relationships with significant others, such as partners or family (Coyle1989, Briody and Chrisman 1991) will play a significant role. Similarly a person lacking in the traditionally desirable personality traits of the early studies might still be open to a broker who shares a common interest or skill, which in turn translates into a greater understanding of and satisfaction with the host culture and assignment in general. The introverted train spotter may successfully settle in a foreign land because, by chance, he shares his interest with his new neighbour and can slot into a social circle based around his interest.

What is really being suggested is that although individual personality and relationship characteristics may be important, they are only important in as much as they help or impede expatriates use of culture broking activities which are also affected by the availability and accessibility of elements affecting such brokerage. A wide variety of factors probably influence openness to brokerage, a number of which have already been investigated to some degree in the expatriate literature: The way an expatriate's own culture operates is likely to influence how they make contact with and approach others, and in this regard the literature on cultural differentiation and novelty (e.g. Hofstede 1980; Berger 1996 and Trompenaars 1993) is important. A persons' past experiences and perception of the influence of these are likely to effect how they treat and meet new experiences. Their own previous experiences of brokerage may influence their openness to brokers, and it may be this element which gives some understanding of why past experience seems to be significant in some studies and not in others. An expatriate's understanding as to how far their new situation is a result of their own choice, and is likely to affect their openness to brokerage. A realistic appreciation as to the sort of acculturation required by the present situation might also affect how an expatriate meets brokerage opportunities.

Openness to brokerage can be seen as a preparedness to make use of opportunities and information that are seen as potentially helpful. This is not to suggest that brokerage is completely unfocussed or lacking in discrimination, but rather it is a reasoned assessment of potential experience that may prove useful to that particular expatriate individual or family.

7.2.ii. Receipt and Donation of Brokerage

Openness to brokerage as receivers or debtors in the exchange is probably relatively uncontroversial as an operational mode for sensemaking in an expatriate situation. This shows a preparedness to receive appropriate training and guidance, long seen as desirable characteristics in expatriates. (e.g. Gertsen 1990). The receipt of mentoring has more recently been advocated as contributing to expatriate satisfaction (Feldman and Bolino 1999) although whether this actually aids performance is uncertain. (v/d. Sluis 2000). Nevertheless, this ability to take up a receiver role may well be compromised by a variety of personality, situational and life phase factors. For example, Coyle (1989) has

considered the inhibiting effect of stress on settling in her study of expatriate partners and Forster (1995) has suggested that some training opportunities are not pursued because of timing and perceived relevance of the training.

It is rather the donor or creditor side of brokerage that will be in greater need of explanation, mainly because of the accompanying concept of reward. Although, as previously stated, there is a culture brokerage 'industry' based on economic reward there is a far greater informal brokerage operation carried out by volunteers whose rewards are far less tangible. These rewards may be for instance, increased self-esteem or confidence for the donor. They could include increased status either in work terms or in the community. When the motivation for brokerage is altruistic, the rewards may be in the pleasure derived from helping others. Studies considering the shaping volunteer motivation suggest a number of determinants of volunteer intentions e.g. subjective expected utility, subjective norms, perceived behavioural control and moral obligation (Harrison 1995) which may give some indications as to how motivation to act on the creditor side of brokerage works. In a culture brokerage model of sensemaking, no judgement is made regarding the desirability of motivation or reward. The suggestion is that brokerage in any manner will serve as a means to operationalise sensemaking opportunities.

Although the debtor and creditor sides of brokerage have been considered separately above, this is a false distinction, as it is in the nature of brokerage that there will be an element of reciprocity. Research in the information exchange field suggests that opinion givers also tend to be opinion seekers (Reynolds and Darden, 1971; Feick and Price 1987) and culture brokers will also need to gather and distribute 'goods' to maintain a viable trade. By donating brokerage services to any one expatriate, a broker is learning at the same time what people like that expatriate will accept or welcome and why. This will help in future brokerage roles.

It is in the nature of the socio-cultural brokerage that the exchange relationship may be multiple and complex. Once again, the importance is not in identifying all individual factors which may affect exchange, but recognising the fact that such factors exist and are important only in so far as they help or inhibit the brokerage mechanism.

There is no one measure that covers both the debtor and creditor sides of brokerage. For this reason it was decided to develop a brokerage measure specifically for this study.

7.3 METHOD

7.3.i. Panel

The identification of socio-cultural brokers is problematic in that such brokerage activity is often informal and not open to public scrutiny. It was felt it was important not to concentrate solely on paid brokers as the aim of the study attempted to ascertain certain brokerage actions and tendencies which could be seriously influenced by economic factors. It was therefore decided to attempt to gain input from both paid and unpaid brokers.

A group of 5 culture brokers were identified to act as a panel drawing up a brokerage profile. This group included paid and unpaid brokers. All belonged to major expatriate institutions in Holland – International Women's Contact, In Touch, Unilever Expatriate Network, and all took some major part in organising activities for expatriates, all in a voluntary capacity, three also in paid employment. Their nationalities were British x 2, Dutch, Canadian/Spanish, and Australian. Between them they had moved internationally 16 times as adults and all were at least bilingual, with the group speaking a total of 6 languages. Since the time of the research, three have moved on to further foreign assignments, and one has repatriated after many years abroad. The language used in discussion was English. Discussions were carried out over a three-month period, August-December1997.

The panel was invited to participate because the author personally knew their brokerage activities. In each instance at least three independent contacts had described the importance of each panel member to their settling in process in the Netherlands. The Dutch broker was included in the group because of many recommendations from expatriates (from all 5 continents) attending her informal conversation class that was regarded as a pivotal resource for acculturation issues. Not all panel members knew each other personally, but all had heard of the others by reputation, and acknowledged their level of standing within the expatriate community, where all held multiple informal and formal roles. For example, one paid broker worked as a language consultant on business

courses for expatriates. She was highly active in a local expatriate volunteer group where her role was to welcome new members. She also organised and ran acculturation exercises for new students within the University. She spoke Spanish, English, German and Dutch and had lived in Canada, Ibiza, Germany and the Netherlands. An example from the unpaid brokers included a founder member of the by then 10- year-old Unilever Expatriate Network which aids the acculturation of newcomers and consists of some 250 families. She had also established or aided the establishment of three other national networks on other overseas assignments, and regularly acted as a volunteer consultant to fledgling spouse organisations. She spoke English German and Dutch fluently. The panel all recognised their activities with newcomers in Boissevain's description of social brokerage that started a baseline for discussion. The panel found socio-cultural brokerage appears to involve the transfer of knowledge in the form of information, contacts and help. These in particular were discussed and items were mostly based around these three dimensions. The panel met in one-to one discussion with the author each on three separate occasions. Statements from other brokers were used as prompts for further and modifying statements from the rest of the group on the second and third meetings. From the panel input, a series of 94 statements were compiled based on broker activity. e.g. a. I'm prepared to use my contacts with others to help other people. b. I collect information that may be useful to someone else c. I'm prepared to use my contacts with others to help other people. Some of these statements were close alternatives covering similar areas. This is because some nuances of statements required exploration. Such brokerage is a complex idea and involves both donation and receipt of brokerage. Although the study tried to establish a scale that would reflect both, the scale in this study tended to emphasise donation rather than receipt of brokerage. This reflects the emphasis of the panel input.

 The number of items is indicative of the difficulty of reducing this particularly complex element to a quantitative scale. Although this resulted in a long questionnaire, this was justified on the basis that completion of such an extensive questionnaire without obvious direct external reward in itself displayed socio-cultural brokerage activity.

The resulting questionnaire had two parts: The first part involved 'brokerage' questions that were statements that would eventually be analysed to form the brokerage instrument

in the main study. Participants were asked to rate to what extent each statement was true for them on a 5 point scale (Very True, Often True, Sometimes True, Rarely True, Never True). Also included were questions on brokers preferences for types of preparation for expatriation.

This was to provide for some comparisons for future feedback to MBA students to encourage them to continue taking part in the study. The second part of the questionnaire included many other items that would subsequently be applied in the main questionnaire. These were included as a means to pilot parts of the main questionnaire.

7.3.ii. Procedure

Six expatriate organisations within the Netherlands agreed to participate in the construction of the instrument. These were selected as being particularly established and respected organisations within the expatriate community. There was no way of establishing how far participants were representative of 'good' brokers other than by the position they held within these organisations, and so the choice was extremely important to this study.

With the exception of Shell Outpost and In touch, all organisations had been operating in the Netherlands for over ten years. In Touch had been formally established in 1991 on the basis of an already existing group of expatriates. Shell Outpost, the youngest of all organisations was established in1996 following the Shell Outlook survey. Based on substantial corporate support it has rapidly become the most influential worldwide family support programme operating from the Netherlands.

A brief description of each organisation and the manner of distribution of the questionnaires are given below:

Koninklijk Instituut voor de Nederlands (KIT). This is a research and training institute focussing on the (sub) tropics and offering cross-cultural and other training programmes for international business. The distribution of broker questionnaires to KIT staff was via a nominated staff member.

Hestia is a commercial operation also providing cross-cultural training programmes and country specific information. They arranged their own distribution of questionnaires.

Shell Outpost is the contact and information centre for expatriating and repatriating Shell families worldwide. They have both volunteers and paid workers in the organisation. Their questionnaires were distributed via the Outpost co-ordinator.

Unilever Expatriate Network is a volunteer network supporting Unilever families moving to or from the Netherlands. Questionnaires were distributed to Area Contacts at their biannual meeting.

Access is "a non-profit foundation which aims to assist English speakers to the Netherlands and to ease their adjustment throughout their stay". The questionnaire was distributed to its volunteers via the organisation's co-ordinator.

In Touch is a social organisation for expatriates in Rotterdam of over 60 families. Questionnaires were mailed directly to committee members.

Participants were asked to complete the 'broker' questionnaire constructed from the panel responses described above. The introduction to the questionnaire stated the questionnaire was to look at the way experienced mediators in an expatriate setting operate. "It doesn't look at why they operate in this way or at the means and resources which are available to them, but at how they operate."

Participants were told that this was a pilot survey to test a particular aspect of a larger academic study being carried out as part of doctoral research at the Erasmus University, Rotterdam. It was explained that as it was being used for validation purposes, the questionnaire might seem to be repetitive and lengthy. It was said that participants answers would be used to establish which questions will be asked of other participants in the final study at the university. On the questionnaire, participants were told "there are no right or wrong answers and the best answer is the one which most fits your experience". It was stated that responses were strictly confidential and would only ever be presented as grouped data.

The questionnaire had 2 main parts with 7 sub parts in all:

Part 1. a) Broker behaviour b) Preparation

Part 2. a) Social support b) Social interaction c) Adjustment d) Orientation e) Personal information

All questionnaires were anonymous and participants in this part of the study were given envelopes so that responses could be mailed free and direct to the Erasmus University in

January 1998. A total of 70 questionnaires were distributed to these organisations. 42 responses (60%) were returned in time to be included in the construction of a 'broker scale'.

7.3.iii. Participants

All but one of the sample was female. 69% of the brokers were aged between 35 and 55. 90% had a partner living with them or elsewhere, 12% had no children. The brokers came from 10 home countries with 1 broker citing multiple home countries (see Table 7.1 below).

Two thirds (66.6 %) of the brokers were not living in their home country. Of the 11% who said they had no previous experience of travelling, living or working in a foreign country before coming to the Netherlands all were now living away from their home country. 37% said they were living in a country that was neither their home country nor the Netherlands prior to this assignment. All said they had at least 12 months experience of travelling, living or working in a foreign country. Between them, the survey participants claimed to be able to speak at least 15 languages. 76% claimed to speak at least 3 languages.

Table 7.1 Home Countries of brokers

Home area		
	Frequency	Valid Percent
Netherlands	14	33.3
Western Europe	15	35.7
North America	4	9.5
Australasia	5	11.9
Africa	2	4.8
Caribbean	1	2.4
Multiple	1	2.4
Total	42	100

7.4   RESULTS

7.4.i.   Results relating to Brokerage scale

The means and variance of the individual items on the scale were checked. Initially, in order to identify distinguishing characteristics of brokers, only those items with high means (greater than 4.000) or low means (less than 2.000) were included. This reduced the number of items to 28. Redundant items were then screened using Kendall's W. This is a test to compare the distributions of related variables and tests the null hypothesis that related variables come from the same population. Kendall's W is interpretable as the coefficient of concordance, which is a measure of agreement among raters. 10 items were removed e.g. the scores for 'I try to help people if I can' and 'I try to help people with information and contacts' rendered these items redundant in favour of the more specific 'I help other people with information I have gleaned from a variety of sources'.
The remaining 18-item scale was tested for reliability and was found to have an alpha of .7475. It was decided not to reduce the scale further. The removal of three items -'I have experienced some degree of 'culture shock' at some point in my life', 'I will pass on uncertain information (reversed)' and 'Helping newcomers to settle in costs me money or other resources' - would have increased reliability to .8098. (Table 7.2).These however were felt to offer interesting dimensions to the scale and were retained. As a further and subsequent test of the scale's reliability, the responses to brokerage items of 17 MBA student participants from the main study (see Chapter 8) who completed both first and second questionnaires, but failed to complete a third (and therefore whose responses do not appear in the main sample) were tested for reliability. This small sample produced an alpha of .8336.
Testing the validity of a characteristic such as socio-cultural brokerage is problematic methodologically. There was an attempt to apply three ways to aid the validity of socio-cultural brokerage in this study. This was done firstly by the choice of sample, secondly by the relation with the social integration scale in the study and finally by the fact that the measure differed from the other brokerage measure; Sense of Coherence. Firstly the selection of the brokerage sample was used to ensure a high brokerage population. The choice of institutions and manner of distribution through known contacts ensured all

Table 7.2 . Reliability analysis of brokerage scale

RELIABILITY ANALYSIS - SCALE (ALPHA)				
Item-total Statistics				
	Scale mean if item deleted	Scale variance if item deleted	Corrected item Total correlation	Alpha if item deleted
VAR22701	74.0238	34.6580	.5111	.7188
VAR22702	73.9524	35.9489	.5201	.7221
VAR22703	74.2381	36.7712	.3096	.7378
VAR22704	73.6190	36.9245	.5094	.7265
VAR22705	74.0000	37.3659	.3835	.7330
VAR22706	71.8333	39.6057	.0783	.7546
VAR22707	73.9524	35.7538	.4878	.7232
VAR22708	74.0952	36.2834	.5350	.7228
VAR22709	74.1667	37.9959	.1315	.7584
VAR227010	72.1429	39.8328	.0350	.7599
VAR227011	73.9048	33.9907	.7172	.7046
VAR227012	75.6429	41.9913	-.1637	.7844
AR227013	74.0238	38.7555	.1792	.7471
VAR227014	74.1667	34.6789	.5118	.7188
VAR227015	73.7857	36.4652	.4584	.7268
VAR227016	74.1667	36.8252	.4093	.7304
VAR227017	74.2619	36.1980	.2836	.7420
VAR227018	74.0714	35.8728	.3998	.7296
Reliability Coefficients				
N of Cases = 42.0				
N of Items = 18				
Alpha = 0.7475				

respondents would be involved in some form of socio-cultural brokerage. Given the diversity of ways and means that socio- cultural brokerage can occur it is a particularly difficult element to identify and measure quantitatively. This study describes socio-cultural brokerage as the most social of sensemaking elements. So in the brokerage sample, the responses for the brokerage scale were checked for correlation with responses for the scale for social integration adopted in the main research. The relationship of Socio-cultural Brokerage to Sense of Coherence in the broker sample was also considered. The results are given in Table 7.3.

Table 7.3. – Correlation of socio-cultural Brokerage, Sense of Coherence and Social Integration scores

		Broker	Social	SOC
Broker	Pearson Correlation	1.000	.562**	.188
	Sig.(2-Tailed	.000	.000	.245
	N	42	38	40
Social Integration	Pearson Correlation	.562**	1.000	.313
	Sig.(2-Tailed	.000	.000	.056
	N	38	38	38
SOC	Pearson Correlation	.188	.313	1.000
	Sig.(2-Tailed	.245	.056	.000
	N	40	38	40
** Correlation is significant at the 0.01 level (2-tailed)				

As expected there is a clear and significant relationship between brokerage and social integration. There is no relationship observed between Sense of Coherence and socio-cultural brokerage in the broker sample. This suggests they are discrete and independent measures.

7.4.ii.   Preparation Preferences of Brokers

The broker questionnaire also solicited responses regarding the kind of preparation input the brokers would themselves like to receive if expatriated.

Fig.7.1. Brokers preferences for types of preparation for expatriation

Preparation Preferences of brokers

n=42
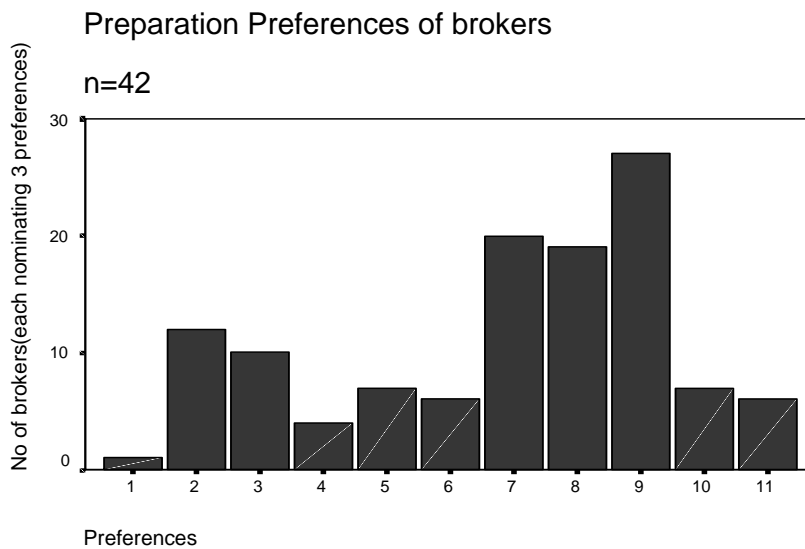
1.   Lots of books/ videos about the physical characteristics and demographics of the country

2.   Lots of books/ videos about the customs etiquette and rules of that country

3.   Lots of books/videos etc about specific concerns you may have about that country, e.g., tax, spouse employment, housing sport and social facilities.

4.   A list of clubs and list of contacts of your own nationality in that country

5.   A list of international contacts in that country

6.   A list of local associations reflecting your own particular interests

7.   Professional input before you go on cultural differences between your home and host countries

8.   Professional input before you go specializing in concerns you may have about moving e.g. housing, tax, schooling, sport and social facilities.

9.   An introduction to speak to someone of your own nationality and similar circumstances who you don't know but who is living in that country

10.   An introduction to someone of your own nationality who has just returned from that country.

11.   An introduction to people who are local nationals in the destination country

This section was included as a feedback instrument for brokers and students. It contained 11 items. Items 1-6 were considered 'cool' preparation aids requiring no personal contact. Items 7-11 were considered 'warm' preparation aids requiring personal contact. Brokers were asked to imagine they were going to a foreign country to live and work. They were asked which three of the following preparation resources they would most like to receive. Responses are shown in Fig.7.1. Brokers showed a clear preference for warm items (Items 7-11) and this is taken as a further indication of their preference for personal contact in the exchange of knowledge.

7.5   CONCLUSION

The aim of the research reported in this Chapter was to develop a reliable and valid way to measure socio-cultural brokerage. Overall that was successful. The reliability of the scale appears reasonable to good. There was a proposal that there should be a positive relationship between socio-cultural brokerage and social integration. The correlation between the two conformed to this proposition. The study still acknowledges that this particular complex element remains difficult to reduce to a quantitative scale.

CHAPTER 8: METHOD OF MAIN RESEARCH

8.1 INTRODUCTION

Chapter 6 developed a hypothetical framework regarding the relations between surprise, sensemaking elements and acculturation responses. Chapter 7 described the development of a valid and reliable way to measure one of the central variables of this model, socio-economic brokerage. The main task- to test the hypothetical model of Chapter 6 remains to be done. This Chapter describes the research method employed. In the next Chapter the results will be presented.

This longitudinal research was carried out using data gained from the 1997 intake of full time Rotterdam School of Management MBA students who were sampled three times over the course of their study. The highly international nature of the Rotterdam School of Management student body is seen to justify the use of students in this study. The institution involved, procedures followed responses and descriptive statistics of respondents are described in the next section.

The next but one section details the operationalisations of surprise, sense of coherence and brokerage and acculturation responses. The questionnaire items themselves are printed in Appendices 3-9. The final section of this Chapter is devoted to the method of analysis used to test the hypothetical model of Chapter 6.

8.2   SELECTION OF METHOD

Past studies of individual responses to expatriation, especially those concerned with adjustment, have relied heavily on quantitative methods (Torbiorn 1982; Tung 1981). Some studies (Briody and Chrisman 1991) have introduced a qualitative factor to studies by analysis of interviews using methods more familiar to anthropology (e.g. timing and quantity of content) but the majority have been firmly underpinned using quantitative methodology.

 Very recently, greater calls have been made for the use of the narrative methods of storytelling to investigate how meaning is bestowed on international assignments. While it has some pedigree in management theory (Brown and Deguid 1991) this methodology

is in it's infancy regarding international experience (Peltonen1998; Bradley, Hendry and Perkins 1999). Such methodology emphasises not only the importance of context but also the construction of meaning for the participant. "Narrative is a form of 'meaning making…'"Narrative recognises the meaningfulness of individual experiences by noting how they function as parts of the whole. Its particular subject matter is human actions and events that affect human beings, which it configures into wholes according to the roles these actions and events play in bringing about a conclusion.... The narrative scheme serves as a lens through which the apparently independent and disconnected elements of existence are seen as related parts of a whole." (Polkinghorne 1988: 36). Action is viewed through language…the way individuals build coherence into a series of events to provide a causal link between past events and decisions taken.

Such qualitative research has become the preferred methodological tool of sensemaking theorists -"storytelling is the preferred sensemaking currency of human relationships among internal and external stakeholders" (Boje, 1991: 106). The attraction of narrative as an approach is that it allows for the simultaneous presence of multiple, inter-linked realities, and is thus well positioned for capturing diversity and complexity. As Weick (1995: 129) stated, "Stories allow the clarity achieved in one small area to be extended to and imposed on an adjacent area that is less orderly."

While the previous illustrations help throw light on individual sensemaking processes, they are also illustrative of difficulties in capturing these processes. Critics of qualitative method for these issues question how generally applicable context and meaning specific information can be. " Difficulties arise because meanings are context tied not just in respect of actors in the narrative, or in respect of the researcher in the study, but also in the readers and study audience… different readers are assumed to "get it" differently, depending on their history, values, or even which side of the bed they rise from." (Barry and Elmes 1997).

This then represents a methodological dilemma. Clearly part of the study could most benefit from the qualitative methods familiar in sensemaking and brokerage studies, other parts with the quantitative methods usual in adjustment literature and sense of coherence studies. As the concept of sensemaking in expatriation builds on and to some extent questions adjustment theory in contemporary business environment, it was felt it would

be most useful to employ methodology familiar in adjustment literature. The lack of hard data in the area of expatriation research is often observed, and the opportunity to test theory quantitatively should be welcomed as providing a baseline methodology against which to test alternative means of research.

It was felt there was a need to attempt a longitudinal study with the same participants rather than the cross-sectional studies that are common in adjustment studies (e.g. Caligiuri, 1997). Cross sectional studies are particularly popular in expatriation because of the difficulties in tracking expatriate participants (Forster 1997) but it is this very reason that introduces bias to cross sectional studies. There is a problem in studies of expatriate satisfaction where variables under investigation are set against variables of tenure and length of expatriate experience. By definition, in a cross sectional study, many of those with longest experience are those who have not chosen to abandon or change their expatriate lifestyle and such cross sectional studies fail to monitor those who have fallen out of the study. This need for longitudinal data is represented by recent work (Riusala and Suutari 2000) and this issue is returned to in Section 8.5.

This research also considers if sensemaking in expatriation is accessible only through quantitative methods. It recognises that qualitative methodology has much to offer this subject, and the quantitative data has been supplemented throughout this study by reference to the author's story and anecdote database. This longitudinal study attempts to consider sensemaking in expatriation quantitatively. It was undertaken to see if sensemaking elements were open to analysis in a way which would enable comparison with previous studies, particularly those core studies addressing adjustment.

8.3   SAMPLE AND PROCEDURE

The participants in the study were all full-time MBA students of the Rotterdam School of Management from August 1997 - March 1999. The Rotterdam School of Management is a business school that emphasises its international character. Their 1997 flyer (contemporaneous for the 1997 intake) contains the following description. "Continuously ranked among the top 5 business schools in Europe, the Rotterdam School Of Management stands out because of its highly international and diverse student population, an impressive exchange program, the mix of teaching styles, the emphasis on team work and an integrated curriculum with strong focus on practice. Our MBA

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programs are designed to develop top international general managers… the informal and friendly learning atmosphere at the Rotterdam School Of Management creates excellent opportunities for students to work closely together and to appreciate different cultures and perspectives."

All students had been assessed by the Rotterdam School Of Management as having sufficient command of English (the course language) to follow an MBA course, and all had to satisfy the academic requirements for post- graduate study. They were a highly international group (See Table 8.1), most of who had considerable foreign experience and indeed it was a requirement of entry on the course that the students would have appropriate work experience. They differed from many expatriates in that they have apparently both directly chosen to expatriate and in the main had personally made a considerable financial investment in the pursuit of this.

Table 8.1. Home countries of Main Sample MBA Students at Rotterdam School Of Management (1997 Intake)

Home area	Frequency	Valid Percent
Western Europe	26	41.3
Eastern Europe	1	1.6
North America	8	12.7
Middle East	2	3.2
Far East	14	22.2
Latin America	8	12.7
Multiple	4	6.3
Total	63	100

In many ways the survey was constructed to provide a snapshot in time of a group of people involved in a discrete expatriate experience. While the difficulties of generalising concepts from a student population are well known, this particular group of students were atypical in terms of their age, previous expatriate background and the requirement to have work experience prior to the course. It was felt the composition of the Rotterdam School Of Management student body meant it could offer information of use to the concept of sensemaking in expatriation. Some of the students were experiencing life away from their

home country for the first time. Others were repatriating, yet more had international experience to draw on for this experience. At the same time, these aspects must be taken into consideration before results from this survey could be considered to be applicable in other situations. Some of these aspects remove factors considered to be significant in other studies of expatriation, but in this study it meant that some variables could be assumed to be relatively constant: task in hand, motivation, length of placement.

8.4   CROSS CULTURAL RESEARCH ISSUES

Any research investigating international business has to take into account the special issues arising from the cross-cultural nature of such research. Adler (1983) has identified 7 areas of concern in cross-cultural research. The first basic concern revolves around a wide-ranging and continuing debate as to **how culture is defined**. This study has already touched on this issue in the introduction to socio-cultural brokerage and a full discussion of this issue is beyond the scope of this research. However, certain methodological issues that directly concern this study were raised by Adler, particularly the extent to which nationality equates to culture, and whether cultures can be seen as homogenous.

In common with other researchers e.g. (Harzing1999) this study has equated nationality to culture for simplicity but acknowledges the difficulties inherent in this. One advantage of this particular sample is they do represent a matched sample in terms of age and academic level across cultures. This means that while it would be unsafe to extrapolate findings from this group to others within particular cultures, data between groups within the sample can be compared on this basis.

Adler expresses concern about how the cultural programming of the researcher will influence issues posed and investigated. Such bias is practically unavoidable and difficult to remedy in a small-scale independent research project with limited funding. For the record and to give perspective, a short description of the author's own background is given at the end of Chapter One.

The research topic is Adler's next area of concern. Most importantly she suggests that at the highest level of abstraction the research topic should be identical across cultures (Adler, 1984) with concepts being conceptually and functionally equivalent i.e. Do concepts used in the study have the same meaning in the cultures under study and are they equally important in these different cultures? (see also Harpaz, 1996; Hines, 1993;

Nasif et al., 1991; Rosenzweig, 1994; Sekaran, 1983; Singh, 1995). While it is accepted that all the study's concepts may be experienced differently and specific interpretations can vary across cultures, it is maintained that, at the highest level of abstraction, the basic concepts will be relevant, important and broadly identical in all countries. On a more detailed, operational level, specific interpretation could vary across countries. This will be discussed under the heading measurement and instrumentation.

Adler's third concern is to do with **sampling**, particularly the spread and number of nationalities involved in the study. Ours was a small sample involving a high number and wide spread of nationalities but not all nationalities were represented by statistically significant numbers to be able to generalise from results for specific cultures.

The possible need for **translation** and language issues form Adler's fourth concern. It is accepted there are losses in translation but there was confidence these students all had a given level of English that minimised these difficulties.

Adler's fifth concern regarding **measurement and instrumentation** falls into two areas - Problems with conceptual equivalence and metric equivalence. Both were areas of special concern to this study. The conceptual equivalence of the research question goes to the heart of the discussion of quantitative and qualitative research methods. At an abstract level concepts might be equivalent across cultures, but their specific meaning might be different. Impolite behaviour and value for money might be meaningful constructs in many countries, but different questionnaire items should be used in measuring them, since the specific content of the concepts might differ across countries. The same might be applicable to some concepts used in this study – for example regarding "culture shock' or 'reward'. Because of the small numbers of participants from the many cultures included in this study differentiating questionnaire items across cultures was unrealistic. The study relied instead on the assumed homogenising influence of the educational position of the respondents, and chose instead to try to illustrate and rectify this issue via the contextually specific story database.

Metric equivalence means that the psychometric properties of data from different cultural groups must exhibit the same coherence and structure. Subjects in the study must respond to the measurement scales used in the same way (Mullen, 1995). According to Mullen, there are two threats to metric equivalence in cross-cultural research: inconsistent scoring

across populations and scalar inequivalence. It cannot be assumed that respondents in all countries are equally familiar with different scale formats. A lack of scalar equivalence or response-set bias might be due to the fact that respondents interpret scales in different ways. Personality characteristics such as social desirability, acquiescence, evasiveness, or humility might not be distributed equally over different cultures. Asian people for instance are often said to avoid extremes (Kotabe et al., 1991; Lee and Green, 1991; Lincoln and Kalleberg, 1985), which results in a tight clustering of answers around the mean.

We acknowledge this may well have relevance for this study, but have also to say that non- culturally based similarities may be more significant. In several of the measures, (e.g. Brokerage, Satisfaction) the participants clustered around high means. This is known to be a characteristic of high achievers in general, and is entirely consistent with an MBA population.

In the same way that all the participants had to have a given level of English to study on this course, all were also required to have a certain level of statistical understanding. A supplementary course for those with no previous academic statistical background was offered to students prior to the main course. This means that these participants had a higher than average knowledge of statistical processes.

<u>The timing of data collection</u> is also identified as an important issue (Adler, 1983a, 1984a; Nasif et al. 1991; Sekaran, 1983). In this study questionnaires were administered simultaneously to all cultural groups so that difference in timing was not a problem. Another issue to be considered in this phase is the response to the research administrator. As Adler (1983a, 1984a) indicates, subjects from different cultures might react respectfully, indifferently or in a hostile way to characteristics such as sex, race, origin, status, and citizenship. Also a major issue in cross-cultural research is a respondent's response to foreigners but as indicated above, a multinational research team was not considered feasible in such a small study. The students were of course used to obtaining a variety of information from the international Rotterdam School Of Management staff and in this way could be considered sophisticated processors of information from foreigners. The administration of research has cross-cultural implications. Education, economic development and language are indicated to have a high impact on the applicability of

surveys. Written surveys are usually only feasible if respondents are literate (in the language of the survey) and have a certain level of education. Regarding these issues language has already been dealt with above and education is not an issue in the population of this study, since all respondents will have a university-level education. Finally, Adler points out cross-cultural studies require sophisticated **data analysis**. Since cross-cultural studies are complex, appropriate statistical analysis is needed; multivariate techniques such as multiple regression are required to explore fully the complexity of the object under study. The empirical part of this study will explore the data collected with both univariate/ bivariate and multivariate techniques.

8.5   RESEARCH DESIGN AND PROCEDURE

The most logical research design to use in considering responses of a particular sample over time is a longitudinal study. Yet they are comparatively rare in expatriation studies (Forster 1997; Suutari and Brewster1999), which tend to use cross-sectional design to overcome the difficulties arising from keeping in touch with such a mobile population. In his study of the management of expatriates in 36 UK companies, Forster (1997) cites a number of examples of problems besetting the project, including the failure of companies to notify researchers of staff addresses after they moved abroad and constantly having to chase companies for expatriate contact addresses.

Our research highlights how major fluctuations in the business environment may lead to expatriates re-evaluating their situation, so it was felt it was important to try and track the experiences of a single population. Had a cross-sectional sample been used one could not be sure that responses to expatriation had not been affected by the differing global realities of, say, employment possibilities, in the different populations over time.

The sample of MBA students was tracked over the length of their course. Three questionnaires were distributed before and after lectures on three occasions over 18 months. Most responses were received on the same day as distribution. On each questionnaire distribution a member of the Rotterdam School Of Management staff introduced the author as researcher to the participants. A second email distribution of questionnaires was carried out following the second and third questionnaires which resulted in a small increase in responses (6% of second, and 15% of third questionnaire responses). The number of responses to each questionnaire is given in Table 8.2.

The timing of the questionnaires was determined mainly by the ability to approach all students simultaneously. The course requires students to follow international assignments and projects, take part in exchanges with other MBA courses and has various assessment procedures throughout its duration which meant the opportunities to sample the entire course were limited.

Table 8.2 Responses to questionnaires

	GENDER		Total
	Male	Female	
First Questionnaire	24	8	32
First and second Questionnaires	16	1	17
First second and third Questionnaires	44	19	63
Total	84	28	112

It was felt it would be useful to track the students at times identified as significant according to adjustment theory (see Fig 2.1), and it was possible to sample all the students after two months, six months and eighteen months (Table 8.3). The initial questionnaire requested demographic details, measured initial surprise, comfort and international intent. It also measured one of the sensemaking elements, Sense of Coherence. This was included in the first questionnaire as it is seen to be a relatively stable dispositional orientation (See section 4.4.iii). Socio-cultural brokerage was measured in this second questionnaire as it was thought applying the instrument at two months might have been too early. It was felt socio-cultural brokerage might be most noticeable at the time when student were settling in but there had to be some chance for brokerage activity to develop. Leaving this measurement to the end could have been compromised by students leaving the course. This second questionnaire also contained questions concerning the preparation preferences of students for overseas assignments. These preparation preference questions were included to use as feedback to the students to keep them involved in the project and to promote further participation. The Rotterdam School Of Management staff acknowledges there are times of particular pressure throughout the course, and where possible these were avoided, although in this regard it

should be noted that although the second questionnaire was administered following an assessment week, it was still considered to be a time of particular stress. For this reason the second questionnaire was kept as short as possible.

Table 8.3. Questionnaire contents and timing – main variables

	INITIAL QUESTIONNNAIRE (TWO MONTHS)	SECOND QUESTIONNNAIRE (6 MONTHS)	THIRD QUESTIONNNAIRE (18 MONTHS)
EXPATRIATION	age gender		
SURPRISE * = Difference Scale	* home country * last country * length of time in Nl. * length of Expat Exp. * status (partners) Dutch * ability * no. of languages * geog. distance matchex	matchex	matchex
SENSEMAKING ELEMENTS	Sense of Coherence	Socio-Cultural brokerage	
COMFORT	General satisfaction 'at home' Desire to stay Expectation to stay Adjustment Social Integration	General satisfaction 'at home'	General satisfaction 'at home' Desire to stay Expectation to stay Adjustment Social Integration.
INTERNATIONAL INTENT	International Intent		International Intent

The third questionnaire measured comfort and international intent at 18 months. Three measures appeared in all three questionnaires. They were selected to follow the students' feelings of satisfaction; of how 'at home' they felt and to what extent their experiences matched their expectations over this 18 months. This last item was to be combined with the difference scale as a final measure of surprise (see 'Matchex' in Fig.8.3).

Given the small numbers involved and the time pressure in capturing this MBA student intake, a large-scale pre-test of the questionnaires was deemed to be too cost-and time-intensive. For this reason most of the variables were operationalised using either existing scales or objective measures. From the responses to the first questionnaire, it was clear that one subsidiary section, drawn from Janssens (1995) study concerning areas of support for expatriates rendered an inadequate response rate for certain items and was thus inappropriate for this population. These questions were therefore deleted from further questionnaires.

8.6   OPERATIONALISATIONS

8.6.i.   Independent variables: Difference/Surprise

Existing adjustment literature already offers the concept of expatriates meeting new, startling or puzzling events and circumstances on foreign assignments and measures to consider this are to be found in existing research. But from what has so far been learned of sensemaking, it is clear that surprise is experienced differentially… it can be very individually centred and context specific. It is accepted that surprise is a relative concept with one person's move from Canada to the USA or one person's move from Belgium to the Netherlands as possibly more disruptive and creating more surprise than another persons move from Colombia to Moscow or Japan. To some extent, then, any measures selected to meter surprise will have limitations. For this reason, surprise factors were limited to those with apparent face validity and established significance in past acculturation studies.

 The most widely regarded instrument measuring cultural novelty arises from the work of Hofstede(1980) on value differences between cultures. The role of past experience

including familiarity with the host culture and language, language ability and family structure and geographical distance are all measures which can be seen as potentially leading to the experience of difference with associated surprise and are easily measured. As far as this study is concerned, it seems appropriate to take these basic difference items as potential baseline 'surprise generators' although this is stated with great caution, and with reference to the concerns noted above.

Difference. Eight variables were used to measure difference between the students' expatriate experience and their current experience on the course. These were their home country, their country of habitation prior to the course('last country'), the length of any past expatriate experience, the length of time they had been in the Netherlands, their marital status regarding partners and family (including absent partners), their own rating of their ability to speak Dutch, the number of languages they said they spoke, and geographical distance. These items were included in the first questionnaire (See Fig.8.3). The first two of these (Home Country and Country of Habitation Prior to the Course) were rated according to the distance from scores for the Netherlands on Hofstede's (1980,1991) dimensions of national culture: Power distance, Individualism/collectivism, Uncertainty avoidance and Masculinity/femininity. Hofstede's model is comparative and is used to compare one national culture against another. It does not set up absolutes. All cultures are ranked on a continuum, and this study is interested in the relative distances on the scales from the Netherlands for both the students home country and their last country of residence. Although these scores were established some time ago, and for this reason have invited some speculation as to their continued applicability in the face of changing cultures (summarised in Harzing and Hofstede, 1996), they have become the standard against which much adjustment literature is measured. Harzing (1999) quotes successive Social Science Citation Indexes list a total of more than 1000 citations of the scales from 1981 through 1996, including supporting replications (e.g. Hoppe, 1993; Lowe, 1996b; Punnett and Withane, 1990; Sondergaard, 1994.) Further, the cultural clusters found by Hofstede conform to the clusters found in many other studies (see Ronen and Shenkar, 1985). The advantage of Hofstede's study is the large number of countries included and the convenient quantification of the various cultural dimensions. It would have been preferable to include the later identified fifth dimension, Confucian

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Dynamism which is seen as particularly relevant in Asian contexts, (Hofstede and Bond 1988), but scores were not available for all countries relevant to the sample.

 Length of past expatriate experience and Length of time in the Netherlands were calculated in weeks. Language ability. Students were asked to list their ability to languages on a 5-point scale (native speaker, fluent, conversational, intermediate, and basic). Fluency in Dutch. Students were asked to rate their ability to speak Dutch on a 5-point scale (native speaker, fluent, conversational, intermediate, and basic). Geographical distance from the Netherlands was measured based on flight duration quoted in KLM Services timetable October 1998-March 1999 to capital cities or (when unavailable) largest international airport of the country indicated. No direct flight was quoted for three countries and so information from appropriate national airlines was sought.

Scores from the above items were standardised and added to make a scale of Difference. *Expectation matching experiences.* It is recognised the types of difference both positive and negative an individual might experience are potentially infinite, so the above elements are considered to offer only what might be termed a baseline of difference. In sensemaking terms, the meaning attached to such difference as experienced by the individual is crucial…this is where surprise is created. In this way having to learn a new language may be less surprising to one expatriate than coping with a different accent in the same language is to another. For this reason a general measure was adopted to consider the extent to which experience matched expectations. This was measured by one basic item three times throughout the study: 'To what extent do you feel what you thought life in general would be like while on the MBA course has been matched your experiences so far?' In the second questionnaire a second question was added which replaced 'life in general' with 'life in Holland' for comparison.

Scores from this Expectation matching experiences item were standardised and added to the Distance items above to form a *Surprise* scale.

8.6.ii. Intermediate variables: Sensemaking Elements

Sense of Coherence was measured using Antonovsky's (1987) shortened 13-point scale (Alpha .837 in Antonovsky's 1987 Israeli national sample). One extra item was added from his extended list ("Does it happen that you have the feeling that you don't know

exactly what's about to happen?") as it appeared specifically relevant to sensemaking and surprise. This scale was felt to be particularly appropriate because of the attention given in its construction to the elimination of cross-cultural bias. This scale was administered on the first questionnaire only, as it is considered to be a relatively stable concept. *Socio-Cultural Brokerage* is a concept that was investigated in early anthropological studies using qualitative methodology. In this study it was measured using an 18-item scale constructed specifically for this research. Its construction from data provided by members of five expatriate organisations in the Netherlands is described in Chapter 6. This scale was included in the second questionnaire. It was felt to be unrealistic to apply it earlier, given that for some items e.g. 'I'm approached by others for information' suggest some opportunity to gather contacts, resources or information is necessary.

8.6.iii. Dependant variables: Acculturation Responses and Comfort

We have already explained that in sensemaking terms acculturation as suggested by adjustment theorists might not be a major goal or outcome of expatriates. The sensemaking approach does not talk in terms of outcomes and suggests acculturation type measures of adjustment may not be necessary. On the other hand when an expatriate lives and works in a foreign country for a significant period of time, they will still need some basic ability to operate in that country. This basic ability to operate in the host country is displayed by scales used in past adjustment research. Two instruments in particular were felt to give an indication of a basic ability to operate in a foreign setting. Scales used by Doering (1993) based on work by Harris and Moran (1991) measured *Adjustment* and *Social Integration*. Because of the length of these scales they were administered on the first and third questionnaires only. These measures are all directed to measuring the felt ability to operate in another country, the Netherlands. The integration scale measures basic emotional operating skills, the adjustment scale measured the basic skills needed to maintain everyday life. Four other simple measures of general satisfaction were included: General satisfaction was included from Andrews and Withy (1974), and feeling of being 'at home' from Janssens' (1995) study. These were measured three times over the course of the study. Desire to stay ('I would like to stay in Holland at the end of my course') and Expectation to stay ('I expect to remain in Holland at the end of my course') were measured twice, in the first and third questionnaires. All these were measured by one

simple item each, asking students to indicate the extent to which the following statement is true on a 7 point Likert scale. Together these variables are referred to as measures of '*Comfort*'.

International Ambitions. This was a very specific population who was involved in a course specifically promoting an international career profile. For this reason, it was important to consider the international intent of students. This could act as an indication as to how far students would be prepared to repeat their experience, but also to consider the possibility that students might continue with the determination to pursue an international career even if they found one particular placement, this one, uncomfortable. To measure International Intent the scale used by Adler (1986) in her study of American MBA students (7 items, + one further item which was removed as redundant following the responses to the first questionnaire -" I had never thought about taking an international assignment until I read this questionnaire") was replicated. Subsequently one ambiguous item was removed "while continuing to live in my home country I would like to travel more than 40% (approx. 20 weeks per year) of my time." This left a 6-item scale measured both in the initial and final questionnaire.

8.6.iv Co-variates

Two 'dummy' co-variates *Age* and *Gender* were entered in the research. They were included as standard co-variates to check relationships with one or more of the variables in the main research. Especially if a co-variate were related to more than one of the variables in the main research multi-collinearity could be the case, which means that an emerging relation between two variables can be explained by a third variable related to both.

8.7   ANALYSIS AND CONCLUSION

The relationships of these hypotheses to the theoretical model are shown in Fig.8.1. Arrows depict the hypothesised relations between the variables. The numbers next to the arrows refer to the numbers of the hypotheses in Chapter 5.

The theory base suggests that a linear analysis of the model may prove inadequate. At the same time, in order to test the model in relationship to past adjustment models, such an approach had some value. Therefore it was firstly checked if there was a straightforward

linear relationship between the independent, intermediate and dependent variables.
Subsequently there was a consideration of relationships between component items and
scales utilising multiple regression to check for more subtle relationships between them
including any changes over time. The resulting analysis of the model is explained in full
in Chapter 9.

Fig.8.1 Relationships within the hypothetical Model
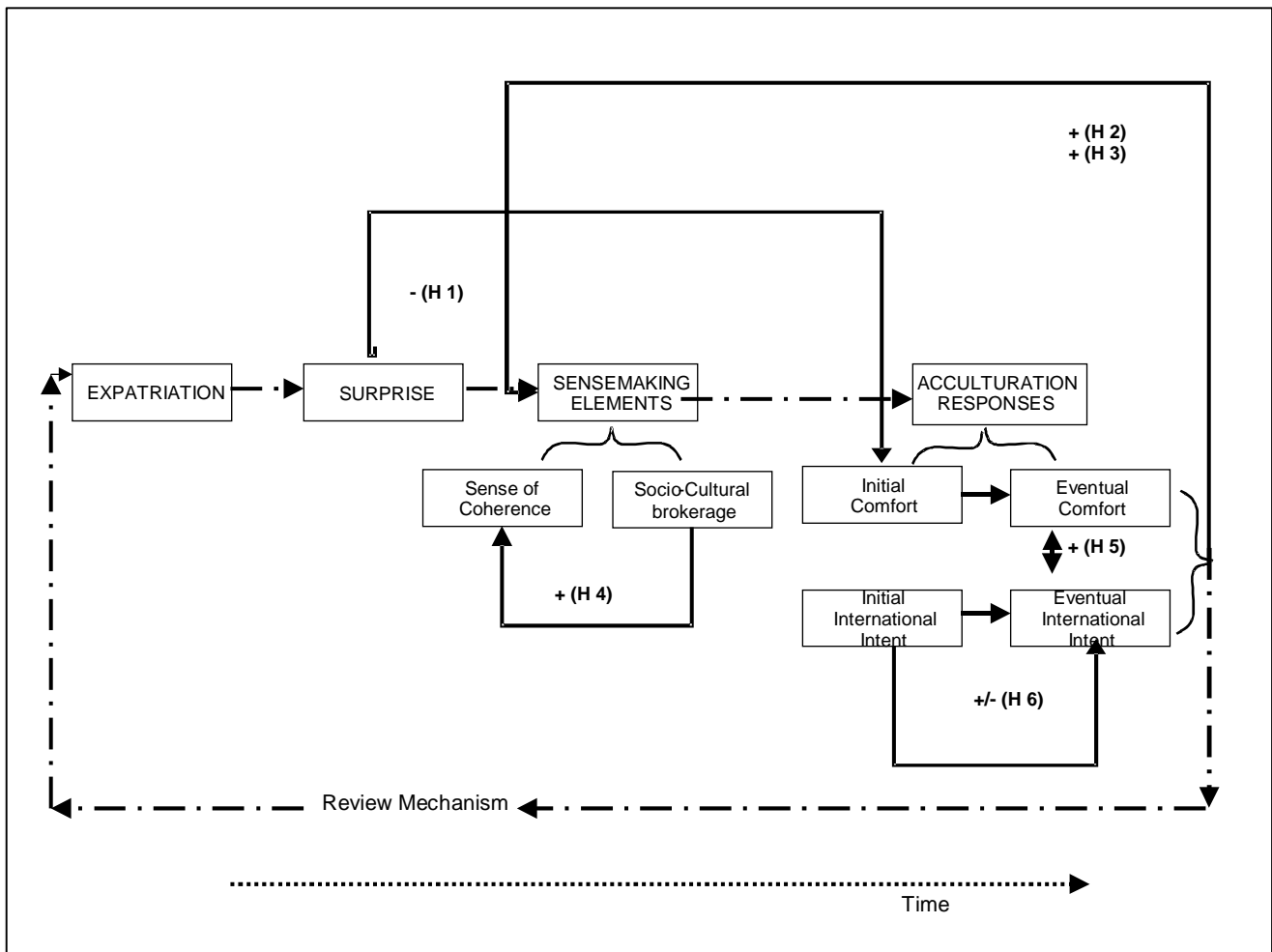
CHAPTER 9: RESULTS

9.1   INTRODUCTION

The previous Chapter ended with a preview of the method of analysis used to test the hypothetical model developed in Chapter 6 (Fig.6.4). This Chapter shows the results of these analyses. The results regarding the hypothesised relations between difference and surprise on expatriation, sensemaking elements and comfort and international intent are presented in section 9.3.

First however, the descriptive statistics and reliabilities pertaining to these variables are examined. The details of all the scales used to measure the variables examined in this study are shown in summary form in Appendix 2, as well as within the following text.

9.2.   DESCRIPTIVE STATISTICS AND RELIABILITIES

This study took place over the period August 1997 - March 1999. The participants in the study were all full-time MBA students of the Rotterdam School of Management (1997) intake. A total of 119 full time students were registered on this course. 115 answered the first questionnaire in September 1997of which 112 responses were useable. 80 responses (referred to in this study as the 'matched sample') could be matched with the second questionnaire distributed in March 1998 and 63 responses could be matched with a third questionnaire distributed in January 1999. Data reported in this article refers to the 63 participants completing all three questionnaires unless otherwise stated.

The sample was 70% male, 30% female. 87%of the students were aged 25 – 35. 42.8% had a partner living with them or elsewhere, 5% had children. The students came from 27 home countries with 4 students citing multiple home countries (see Table 9.1). 5 students were Dutch. 92% of the students were not studying in their home country. Of the 14.2% who said they had no previous experience of travelling, living or working in a foreign country before coming on their MBA course all were now living away from their home country to follow their MBA course. 37% said they were living in a country that was neither their home country nor the Netherlands prior to this course. 65% said they had at least 12 months previous experience of travelling, living or working in a foreign country. 75% of students had been living in the Netherlands for less than two months, and a

further 17% had been living in the Netherlands for less than two years. Between them, the survey participants claimed to be able to speak at least 28 languages. 75% claimed to speak at least 3 languages.

Means and standard deviations were calculated for total scores on each of the variable scales. Cronbach's alpha was calculated for each variable scale to assess its internal reliability in terms of item-total consistency. Pearson correlation coefficients were calculated between total scores on each scale or major variable at between one and three points during the progress of the course as appropriate. Multiple linear regression equations were calculated at each stage to determine the relative importance of Surprise, Socio-cultural brokerage and Sense of Coherence for the dependent acculturation variables of total Comfort and International Intent. Details of the scales used in the survey relevant to sensemaking are summarised in Appendix 1. Results relating to the scales and dimension items of the major variables are first given below, followed by results pertaining to the major surprise, combined sensemaking and comfort variables.

9.2.i.   Dimension Difference / Surprise Variables

First the independent variables of this study are considered. A large component of the scale for surprise consisted of measures of difference. These attempted to give some measure of how far in geographical and other terms was the students experience of the Netherlands from their home country and past experience. Difference items included home country, country of habitation prior to the course, length of past expatriate experience, length of time in the Netherlands, marital status regarding partners and family (including absent partners), ability to speak Dutch, the number of languages spoken, and geographical distance.

Difference measures produced the following results. All but 8% of the students were not studying in their home country. 43% of students said their home was in Europe, 25% counted the Americas as home, 3% came from the Middle and 22% in the Far East. A number of students (6%) said they had multiple home countries. 28% of students came from countries where the capital (or equivalent international airport) was less than 1 hour's flight away. For 29% of students, the capital (or equivalent international airport) was at least 11 hours flight from Amsterdam. 12% of students were living away from

their partner. One person spoke one language only (English). 68% said they spoke at least 3 languages. 87.3% said they had just basic or no Dutch.

37% said they were living in a country that was neither their home country nor the Netherlands prior to this course. 65% said they had at least 12 months previous experience of travelling, living or working in a foreign country. Between them, the survey participants claimed to be able to speak at least 28 languages. 75% claimed to speak at least 3 languages.

Fig.9.1. Frequencies re: Hours travel from Home Capital and Languages spoken by MBA Students n=63
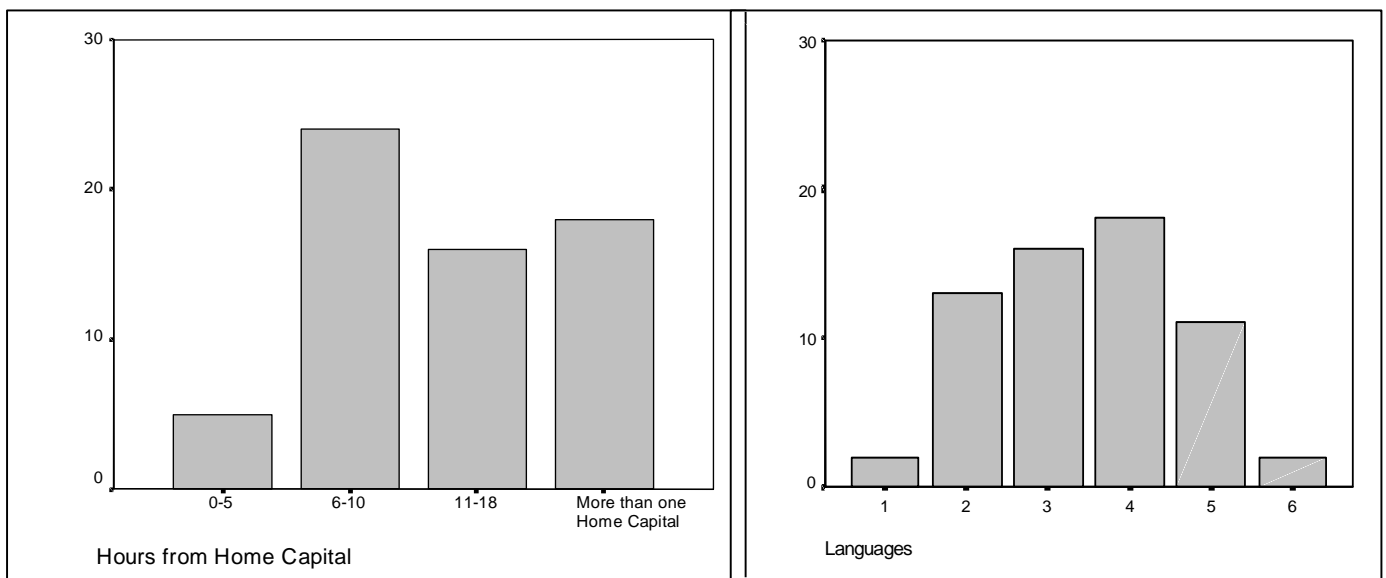
We considered the differences students experienced in moving to a country with different scores on Hofstede's dimensions of culture. The focus was on how different Dutch dimensions of culture were from the student's own country's dimensions of culture. No attempt was made to group students into those coming from countries scoring high or low on any dimension. This was to avoid being judgmental about what might constitute 'difference'.

Sensemaking theory allows that a student coming from a country scoring high in e.g. power distance might find greater power distance as significant as less power distance. Therefore difference from the Dutch standard scores was measured making no distinction between scores that were higher or lower than scores for the Netherlands. (Table 9.1).

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Scores for the Netherlands for Hofstede's four dimensions are as follows:

Power Distance	38
Individualism/Collectivism	80
Masculinity/Femininity	14
Uncertainty Avoidance	53

Scores for other countries included in the study are given in Appendix 3.

Some individual students faced considerable difference in the values they encountered in the Netherlands as measured by these dimensions. The highest differences are noted below, together with the means for the student sample as a whole.

In considering Table 9.1, by far the most difference related to scores on the masculinity/femininity dimension. The Netherlands scores low in masculinity on this dimension (14) and in fact only one student came from a home country scoring lower on this dimension.

Table 9.1. 20/06/00 Difference from the Netherlands re Hofstede's dimensions of Culture

	Power Distance			Individualism/ Collectivism			Masculinity/ Femininity			Uncertainty Avoidance		
	Highest Diff.	Lowest Diff.	Group mean	Highest Diff.	Lowest Diff.	Group mean	Highest Diff.	Lowest Diff.	Group mean	Highest Diff.	Lowest Diff.	Group mean
Home Country	56	0	17.87	68	0	26.49	81	0	39.79	47	0	18.59
Previous Country	56	0	15.46	68	0	24.94	81	0	41.85	47	0	17.27

All difference items were combined into a scale of difference (alpha = .7694)

In order to obtain data concerning a more subjective assessment of surprise over the period of the course, participants in this study were requested to report the extent to which expectations were matched by experience at three points in time, after two months, six months and 18 months.

The degree to which students expectations were matched by experience appeared to change slightly over time with the weighted mean score for this variable changing from 4.57 after two months, to 4.10 after 6 months then rising to 5.06 as students reached the

end of their course (a higher score means a greater match of experience and expectations). This is discussed further in section 9.7.where the study considers the results relating to whether acculturation responses vary over time.

The measure examining the degree to which students expectations were matched by experience was added to the difference scale to produce a scale of 'Surprise' (alpha = .7106). The responses to this surprise scale were grouped (in score increments of 25) to display the distribution of the scale and this is shown in Fig.9.2. Those represented in columns 1-3 displaying least surprise were Dutch students on the course.

Fig.9.2. Distribution of Surprise scores n = 62
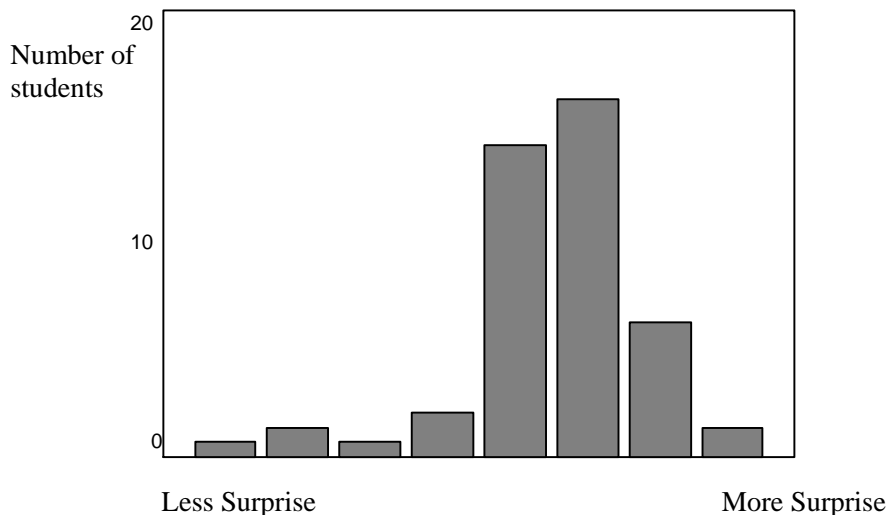
Although initially the fixed element of the surprise scale (measurement of difference between home and last expatriate experience and experience on the course) correlated significantly with how experience matched expectations(' matchex)(-.340**), this relationship weakened over time(matchex 2, matchex3) (-.096, .029) and was no longer significant. It is not clear if changes in this relationship reflect adjustment of expectations or rather for instance memories of expectations being adjusted over time. The question relating difference items to experiences of Holland (matchexH) matching expectations was significant (-.364**), on the second questionnaire (Table 9.3).

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Table 9. 2 Results Summary : Surprise scale at 2 months and Dimension items

SCALE	SAMPLE ITEMS	No OF POINTS ON SCALE	No. OF ITEMS	No. OF QUESTIONNAIRE	1ST RESPONSES		LAST RESPONSES		ALPHA (matched sample, first responses)
					Mean	Std Devn.	Mean	Std Devn	
Difference scale	home country (4 Items) last country (4 Items) length of time in Nl. Length of Expat Exp. marital status Dutch ability no. of languages geog. distance		14	1					.7694 n=62
Experience = Expectations (matchex)	To what extent do you feel what you thought life in general would be like while on the MBA course has been matched your experiences so far?	7 Range= 0-7	1	1,2,3	4. 57	1..28	.5.0 6	1.2	n=63
TOTAL Surprise	Composite scale of difference and experience = expectations	Range = 0 - 418	15	1,3					.7106 n=62

Table 9.3 Summary of correlation relating to the Surprise scale and Dimension items

		Matchex	Matchex2	MatchexH	Matchex3	Difference
Matchex	Pearson Correlation	1.000	.262*	.261	-.024	-.340**
	Sig (2-tailed		.043	.065	.852	.006
	N	63	60	51	63	63
Matchex2	Pearson Correlation	.262*	1.000	.710**	.338**	-.096
	Sig (2-tailed	.043		.000	.008	.465
	N	60	60	48	60	60
MatchexH	Pearson Correlation	.261	.710**	1.000	.088	-.364**
	Sig (2-tailed	.065	.000		.539	.009
	N	51	48	51	51	51
Matchex3	Pearson Correlation	-.024	.338**	.088	1.000	.029
	Sig (2-tailed	.852	.008	.539		.820
	N	63	60	51	63	63
Difference	Pearson Correlation	-.340**	-.096	-.364**	.029	1.000
	Sig (2-tailed	.006	.465	.009	.820	
	N	63	60	51	63	63
** Correlation is significant at the 0,01 Level (2-tailed)						
* Correlation is significant at the 0,05 Level (2-tailed)						

9.2.ii. Dimension Sensemaking Variables

To examine the variables of Socio-economic Brokerage and Sense of Coherence mean scores, standard deviations and Cronbach's alpha estimates of reliability were calculated for each of the variable scales.

Table 9.4. Summary of Results relating to the Socio-Brokerage, Sense of Coherence and Combined Sensemaking Scales

SCALE	SAMPLE ITEMS	No OF POINTS ON SCALE	NUMBER OF ITEMS	No. OF QUESTIONNAIRE	RESPONSES		ALPHA (matched sample, first responses)
					Mean	Std Devn.	
Brokerage	**Helping newcomers to settle in costs me money or other resources** **Not true….very true**	**7** **Range =** **0-98**	**18**	**2**	**91.57**	**12.69**	**.8614** **n=63**
Sense of Coherence	**Has it happened in the past that you were surprised by the behaviour of people whom you thought you knew well?** **Never happened…..always happened**	**7** **Range =** **0-126**	**14**	**1**	**67.25**	**9.39**	**.7701** **n=63**
TOTAL Combined	**composite scale of sensemaking elements**	**7**	**32**	**1+2**			**.8013** **n=63**

These are given in Table 9.4. Sense of Coherence using the 14-point scale described in Chapter 4 produced an alpha of.7701 and the18-item Socio -Cultural Brokerage scale rendered an alpha of .8614 in the MBA sample. These two items were then standardized and added to form a combined sensemaking scale (Alpha of . 8013 on the results from the 63 students who completed third questionnaires). The responses of students to this Combined Sensemaking scale were grouped to display the distribution of the scale and this is shown in Fig. 9.4.Pearson correlation coefficients were calculated for Socio-economic Brokerage and Sense of Coherence. No significant correlation was found between Sense of Coherence and Socio-Cultural brokerage for the matched sample (see Table 9.8).

Thus there was no support for Hypothesis 4 (H4) Sense of Coherence will be positively related to Socio-cultural brokerage. These appear to be independent, unrelated items.

Fig.9.3 Distribution of Combined Sensemaking Scale n=63
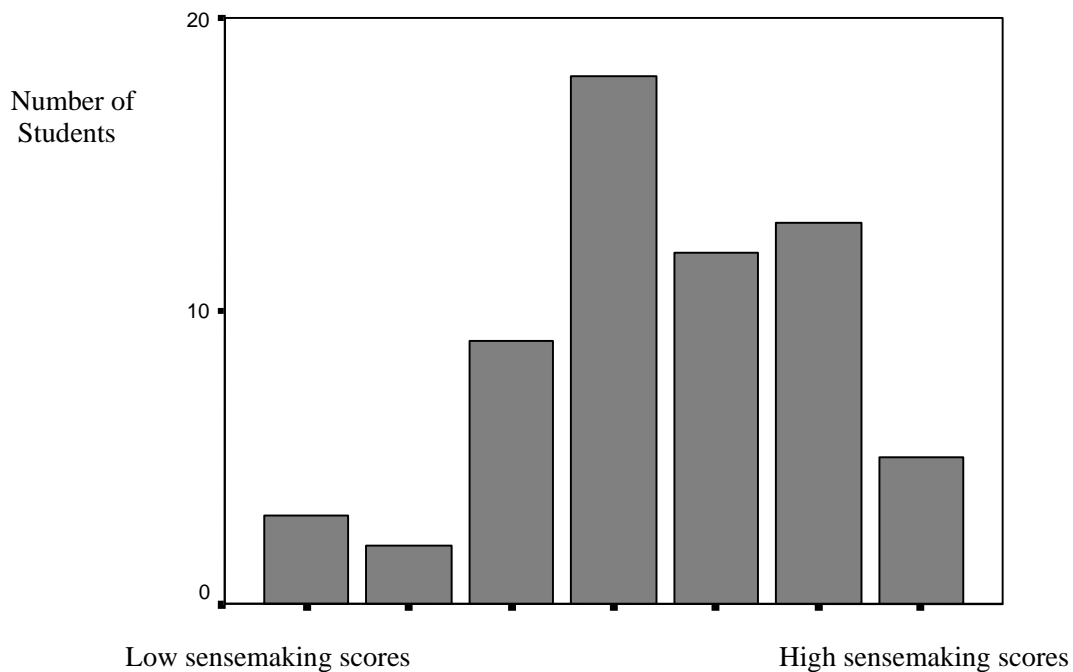
We looked to see if either of the sensemaking elements correlated with the major variables. Anecdotal evidence that the Socio-Cultural brokerage element was of great importance was not supported in this study. No significant correlation was observed between Socio-Cultural Brokerage and any of the major Surprise, Comfort or International Intent variables (See table 9.8). This is discussed in Chapter 10. The situation with regard to correlation for Sense of Coherence with these variables was different, and for ease of reporting, these, together with results for the combined sensemaking elements, are given in section 9.3 on the relationship between major variables.

9.2.iii. Dimension Comfort Variables

Several of the hypotheses relate to the acculturation responses of students, particularly how comfortable students were initially, or how they rated their comfort after 18 months. Means and standard deviations for all acculturation/comfort measures over time during the time on the MBA course are documented in table 9.5.

Fig.9.4 Distribution of Initial and Eventual Comfort scores n=54
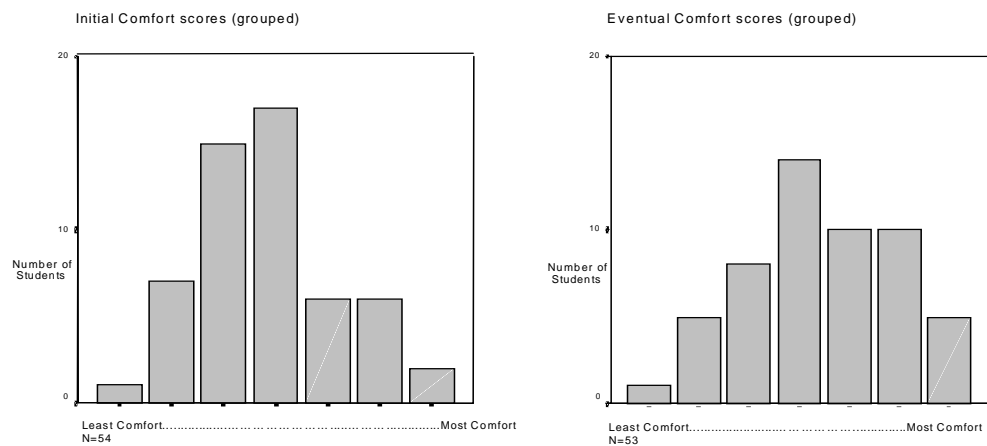
Table 9.5. Summary of Results relating to Comfort elements and Dimension items

	SAMPLE ITEM	No OF POINTS ON SCALE	No. OF ITEMS	No. OF QUESTIONNAIRE	1ST RESPONSES		LAST RESPONSES		ALPHA (matched sample, first responses)
					Mean	Std Devn.	Mean	Std Devn	
Social Integration	In terms of living in this country how able do you feel you are… in empathising with another person?	7 Range= 0-84	12	1,3	42.00	7.9	46.07	7.8	.9217 n=59
Adjustment	How adjusted are you… to the cost of living at this location?	7 Range = 0-63	9	1,3	30.19	7.2	31.90	6.5	.8770 n=58
Satisfaction	To what extent do you agree with the following statement ; I am satisfied with life here	7 Range= 0-7	1	1,2,3	4.86 2nd Q 4.17	1.01 2nd Q 1.45	4.. 5	1.37	
At home	To what extent do you agree with the following statement: I feel at home in this country	7 Range= 0-7	1	1,2,3	4.24 2nd Q 3.92	1.40 2nd Q 1.47	3.98	1.64	
Like	I would like to stay in Holland at the end of my course. completely disagree….completely agree	7 Range= 0-7	1	1,3	3.65	1.67	3.38	2.1	
Expect	I expect to stay in Holland at the end of my course. completely disagree…completely agree	7 Range= 0-7	1	1,3	3.19	1.7	3.12	2.0	
TOTAL Comfort	* composite scale of acculturation measures	7 Range= 0-175	25	1,3	87.63	13.52	94.15	15.38	.8690 n=54

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Means on four of the items (satisfaction, at home, like and expect) decreased between the first and third questionnaires indicating students felt less satisfied, felt less at home, and said they would not like or did not expect to stay in Holland after their course). Means on the two items measured by scales: Social integration (alpha. 9217) and Adjustment (alpha.8770) increased slightly between first and final questionnaires. These are considered further in section 9.7 that reports on results relating to dynamism in expatriation.

When the Dimension items were combined, they produced a composite Comfort scale with a reliability of .8577 on the first questionnaire responses, .8690 on responses to the matched sample. The responses of students to this Comfort scale were grouped (in score increments of 10) to display the distribution of both initial and eventual responses to this scale and this is shown in Fig. 9.4.

To understand how initially comfortable the students were, correlation coefficients were calculated for all 'comfort' variables measured on the first questionnaire. Understandably there was a high correlation between those students who said they would both like and expect to stay in the Netherlands (.743**). The next highest correlation was observed between students responses with regard to social integration and their general satisfaction (.574**).

Correlations were also observed between students responses regarding how at home they felt and adjustment (.447**), and between students responses regarding how at home they felt and social integration (.371**).

When correlation coefficients were calculated for all 'comfort' variables measured after 18 months on the final questionnaire, a greater number of correlations was observed. These are summarised in Table 9.6 .

The correlation between those students who said they would both like and expect to stay in the Netherlands had risen (.913**). Other correlation had also emerged. In fact, of 15 correlations tabled below (Table 9.6), only three now showed no significant relationship at this time: Adjustment/ Desire to stay in the Netherlands, Social Integration/ Satisfaction, Desire to stay in the Netherlands / Social Integration. It is of note that the second highest correlation at the first time of testing, between students responses with

regard to social integration and their general satisfaction no longer shows any significant relationship.

Table 9.6. Correlations – Dimension comfort variables at 18 Months

	1	2	3	4	5
1.Satisfaction N=					
2. at Home N=	.723** 63				
3.Expect N=	.296* 63	.390** 63			
4.Like N=	.413** 63	.401** 63	.913** 63		
5.Adjust N=	.343** 58	.578** 58	.366** 58	.251 58	
6. Social =	.243 56	.403** 56	.304* 56	.232 56	.496** 53

** Correlation is significant at the 0,01 Level (2-tailed)

*   Correlation is significant at the 0,05 Level (2-tailed)

9.2.iv. International Intent Variable

The International Intent scale consisting of a 6 item scale produced an alpha from the initial questionnaire of .8123 (n=111). The alpha for responses to the matched sample was .7769 (n=63). This appears to be a particularly constant variable throughout the study with initial international intent correlating significantly (Table 9.8) with international intent measured at the end of the course (.588**) Most students were persistent in their declaration that they wished to pursue an international career.

Table 9.7. Summary of Results relating to International Intent Variable

SCALE	SAMPLE ITEM	No OF POINTS ON SCALE	NUMBER OF ITEMS	No. OF QUESTIONNAIRE	1ST RESPONSES		LAST RESPONSES		ALPHA (matched sample, first responses)
					Mean	Std Dev n.	Mean	Std Dev n	
International intent	I would like my first job after my MBA to be in a foreign country Very true…not true at all	7 Range= 0-42	6	1,3	33.73	7.73	33.42	7.80	N=63 .7769

Fig 9.5 Distribution of Initial International Intent scores

International Intent scores (grouped)

Least International Intent.
N=63

Most International Intent

134
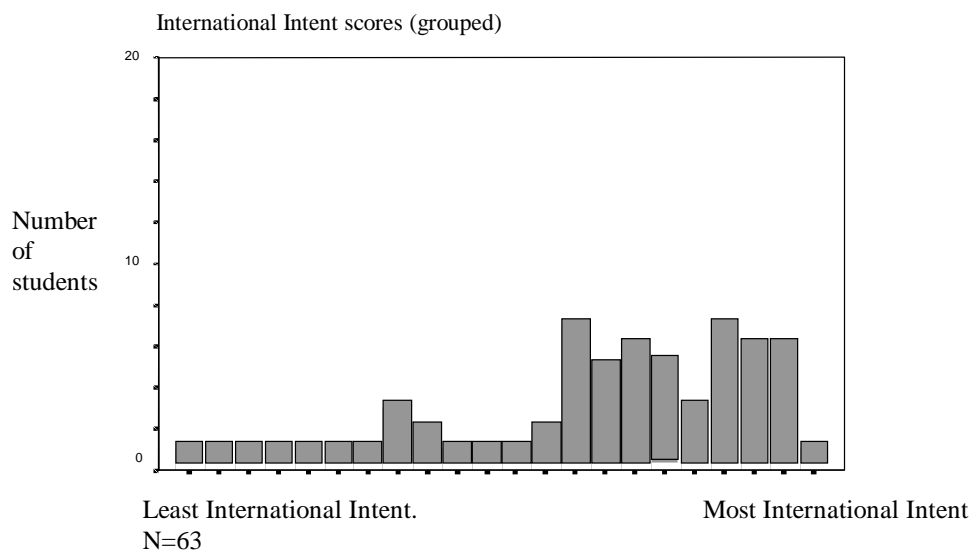
9.3 ASSESSMENT OF HYPOTHESIZED RELATIONS BETWEEN SURPRISE, SENSEMAKING ELEMENTS AND COMFORT

9.3.i. Correlation of Dependent Variables

Pearson correlation coefficients were calculated between total scores on each major variable at two months (initial) and 18 months (end of course). These are summarised in Table 9.8.

We had expected to find a negative relationship between initial comfort and surprise - H1.   An expatriate's initial comfort will be negatively related to surprise - and this was congruent with the findings of this study. Initial Comfort was negatively correlated with Initial surprise (-. 305**). This relationship was maintained over time in that Eventual Comfort was negatively correlated with Initial surprise (-. 436*). The more surprised students were, the less comfort they appeared to experience in the early stages of their course and the effect of this early surprise on comfort appears to continue throughout the course.

As far as the sensemaking elements are concerned no relationship was observed between Socio-Cultural Brokerage and Initial Comfort or International Intent. However, Initial Comfort was positively correlated with Sense of Coherence (.394**). International Intent was also positively related to Sense of Coherence (.245*) as was Combined Sensemaking (.323**). At the initial stage of considering correlation it appeared that of the two sensemaking elements, Sense of Coherence could provide interesting input.

Initial dependent variables, Initial Comfort and Initial international intent were found to be positively related (.337**). A similar positive relationship (.365*) applies to the eventual dependent variables, Eventual Comfort and Eventual international intent - see Table 9.8.

We were interested to consider if sensemaking proscribes comfort or a preparedness to repeat the experience and hypothesised: H2   An expatriates eventual comfort will be positively related to sensemaking elements and H3   An expatriate's eventual international intent will be positively related to sensemaking elements. Neither eventual

comfort (.153) nor eventual international intent (.092) showed significant correlation to sensemaking elements in the study. (Table 9.8.)

Table 9.8 Correlation of Major Variables over Time (Month measured given in parentheses)

	Variables	1	2	3	4	5	6	7
1	Surprise Initial (2 months) n =							
2	Sense of Coherence (2 months) n =	-.052 63						
3	Brokerage(6 months) n =	.027 63	.086 63					
4	Combined sensemaking (6 months) n =	.017 63	.737** 63	.737** 63				
5	Comfort Initial (2 months) n =	-.305** 54	.394** 54	.078 54	.323* 54			
6	Comfort (18 months) n =	-.436* 53	.162 53	.069 53	.153 53	.363* 46		
7	Int.'l intent Initial (2 months) n =	-.087 63	.245* 63	.230 63	.323* 63	.337** 54	.101 53	
8	Int.'l intent (18 months) n =	.126 53	.035 53	-.005 53	.027 53	.092 45	.365* 44	.588** 53

** Correlation is significant at the 0,01 Level (2-tailed)

*   Correlation is significant at the 0,05 Level (2-tailed)

### 9.3.ii Multiple Regressions of Dependent Variables

To further examine the relationships between major variables examined in the study, multiple linear regression were calculated for responses at both two months and 18 months. Multiple linear regression equations were calculated at each stage to determine the relative importance of Surprise, Socio-Cultural brokerage and Sense of Coherence for the dependent acculturation variables of Comfort and International Intent both initially and at the end of the course (Table 9.9).

Hence the independent surprise variables were entered into the regression equation with the dependent variables being the major acculturation responses of comfort and international intent. The intermediate variables of Sense of Coherence and Socio-cultural brokerage were also considered and well as the combined sensemaking variable (a combination of these two variables).

Table 9.9. Correlation – Comfort and International Intent at 2 and 18 Months

		COMFORT	COMFORT3	INT.INTENT
COMFORT3	Pearson Correlation	.363*		
	N	46		
INT.INTENT	Pearson Correlation	.337**	.101	
	N	54	53	
INT.INTENT3	Pearson Correlation	.092	.365*	.588**
	N	45	44	53
* Correlation is significant at the 0.05 level (2-tailed).				
** Correlation is significant at the 0.01 level (2-tailed).				

9.3.iii. Multiple Regressions of Comfort Variables

The first regressions were centred on the dependent Comfort variables. The following regressions were calculated: Firstly Dependent: Initial Comfort. Predictors: Surprise and Combined Sensemaking (R-square: 0.183) Standardised coefficients (Beta): Combined Sensemaking: 0.299 Surprise: -0.316. Both surprise and combined sensemaking emerged as predictors of initial comfort scores (the greater the surprise the less comfortable students appear to be, the greater their sensemaking score, the more comfortable they appear to be).

Secondly, because of the extremely low partial correlation between variable Socio-Cultural Broker and Initial Comfort (.086), Initial Comfort was regressed against Surprise and the independent components of the combined sensemaking scale: Sense of Coherence and Brokerage. The results are as follows:

a) Dependent: Initial Comfort. Predictors: Surprise and Sense of Coherence (R-square: 0.238 Standardised coefficients (Beta): Sense of Coherence: 0.380 Surprise: -0.287.

b) Dependent: Initial Comfort. Predictors: Surprise and Brokerage (R-square: 0.104) Standardised coefficients (Beta): Brokerage: 0.103 Surprise: -0.314. So Sense of Coherence appears to be the more important predictor regarding initial comfort.

We then looked at regressions for Eventual comfort as follows:

a) Dependent: Eventual Comfort. Predictors: Initial Surprise and Combined Sensemaking (R-square: 0.208) Standardised coefficients (Beta): Combined Sensemaking: 0.137 Surprise: -0.434.

b) Dependent: Eventual Comfort. Predictors: initial Surprise and Sense of Coherence (R-square: 0.207) Standardised coefficients (Beta): Sense of Coherence: 0.130 Surprise: -0.426.

c) Dependent: Eventual Comfort. Predictors: Initial Surprise and Brokerage (R-square: 0.197) Standardised coefficients (Beta): Brokerage: 0.085 Surprise: -0.439.

Both initial surprise and combined sensemaking emerged as predictors of eventual comfort scores (the greater the surprise the less comfortable students appear to be, the greater their sensemaking score, the more comfortable they appear to be) but in this case combined sensemaking appears to have a lesser predictive effect than on initial surprise.

Once again Sense of coherence is the more important predictor but significantly less than in regard to initial comfort. The more initial surprise experienced by a student, the less impact their Sense of Coherence appears to have on their comfort over time. Relationships in respect of Hypothesis 2 (An expatriate's eventual comfort will be positively related to sensemaking elements) are complex. Sensemaking elements, especially Sense of Coherence, do appear to have some predictive power in determining at least initial comfort. It may well be that people with a strong Sense of Coherence are more likely to be comfortable with their initial expatriation experiences because they are less easy to surprise. This predictive power continues, although is reduced over time. This is reflected in correlation regarding the variables. The correlation between Combined Sensemaking and Comfort for the initial period shows a significant 0.323* but drops to a very weak and no longer significant 0.153 in the responses measured 18 months later at the end of the course. This drop in significance is also seen in correlation between Comfort and Sense of Coherence (from.394** to .162). Why should this be? Sense of Coherence is considered by Antonovsky to be a relatively stable measure in adults. However it could be that this course was of such life changing magnitude for the students that this influenced the results. In this regard it should be noted that an MBA is promoted as an opportunity to challenge past ways of viewing experience and understanding. Comments of MBA students and staff elsewhere on MBA courses can reflect the major changes such a course can bring. " Many students come to use INSEAD as a pivot in their professional lives – to shift location, function or industry. Many find it also acts as a pivot in their personal lives – planned or otherwise" (Gordon 2001). " What alumni talk about when they come back is not about what they learned in marketing or finance and only rarely about the professors, what they really talk about is the experience". (Landis Gabel, Dean of INSEAD, quoted in Bradshaw 2001: I). Alternatively it could be that the particular nature of the task in hand (i.e. the satisfaction of completing a set course of study) exaggerated comfort scores at the end of the course.

9.3.iv. Multiple Regressions of International Intent Variables

The next regressions were centred on the dependent International Intent variables. Combined sensemaking emerged as a predictor of Initial International Intent (R-square : 101) Standardised coefficients (Beta): Combined Sensemaking:0.318) but this was not

the case in Eventual international intent. Surprise played no part in predicting either initial international intent or eventual. International intent. The regressions with initial international intent and international intent after 18 months as dependent variables against the individual sensemaking elements of Sense of Coherence and Broker were not significant. So Hypotheses 3 (An expatriate's eventual international intent will be positively related to sensemaking elements) was not supported by this study. Comfort showed congruence with initial international intent in the regression. it was a predictor or initial international intent (R-square:.114) Standardised coefficients (Beta): Comfort : .337 Results were consistent with H 5:Eventual Comfort will be positively related to eventual International Intent as shown in the correlation above (.365*). Initial international intent and international intent after 18 months were highly correlated (0.588**) indicating that the international intentions of the students of the study seems relatively very stable regardless of other factors. Eventual Comfort was a predictor of eventual international intent (R-square:.133) Standardised coefficients (Beta): Eventual Comfort : .365 but a more powerful predictor was found to be initial international intent (R-square:.311) Standardised coefficients (Beta): Initial international intent : .558. Essentially, International Intent was a very constant variable and did not alter markedly over time, something that is very understandable for this population. The Rotterdam School of Management markets itself on its equipping students for an international career and most students will go there because they want international careers. Of all the hypotheses, H3 and H5 were ones that were most likely to have been affected by the sample group's specific characteristics.

9.4   EFFECTS OF GENDER

We return to the initial impact of Sense of Coherence on Comfort that appears to be reduced in interaction with Surprise. When the demographic variable of gender was introduced into the equation it was found to have a considerable effect. It increased the R square to 0.322. The inclusion of gender as an explanatory variable introduces the fact that on average women are 10 points higher in the scale of comfort compared to men and thus this variable contributes to explaining comfort in the regression model. On the whole women in the sample appear to be more positive than do men. This is shown by their higher average score values in certain variables (the degree to which expectations are

matched by experience, Sense of Coherence, social integration, satisfaction, Socio-Cultural brokerage, desire to stay in the Netherlands, feel at home in the Netherlands) in the initial period. However, with the exception of satisfaction, women, after starting with higher comfort levels than men, tend to level off with men by the end of the course.

We then considered the following relationship - Dependent: Comfort. Independent: Sense of Coherence, Surprise and Gender which produced the following results: R sq.: .322 Standard coefficient (used to compare the relative impact of each predictor) Gender: .295 Sense of Coherence: .326 Surprise: -.297. With regard to the gender influence, gender is clearly a relevant factor in predicting comfort in the initial phase. The Comfort means for males and females at the end of their course were checked to see if the difference observed initially persisted. But the situation had actually reversed: the comfort means for men were 95 and for women 91 at the end of the course as opposed to initial comfort means of 85 and 95 respectively. It can be said the importance of gender over the period is reduced with men being slightly more "comfortable" than women over time.

 If the database is split by gender, the women's sample is much too small to perform analysis of certain complexity. Given the predictive factor of gender, simple investigation was carried out on the split database. When as an indication surprise was regressed on comfort in both gender samples the influence of surprise is striking in women - the R square is noteworthy (near .50) and weak in the case of men. The impact of surprise on comfort is undeniably stronger in women in this sample but it is not possible to quantify with reasonable precision the size of this impact on the female sample because the sample is not sufficiently large.

Literature surrounding gender differences has often addressed the question of women's preparedness to become international managers (Adler 1984; Linehan 1999).The discovery of the predictive power regarding gender led to a consideration of how Surprise might affect comfort and comfort might affect intent. The study is especially interested to learn if this was gender related. The contribution that comfort makes in explaining both initial international intent and international intent at the end of the course for the whole data set was examined. In both cases an R square of .11 was obtained i.e. 11% of the variance explained. So the negative impact of surprise on intent via comfort should be

small relatively speaking. In other words, 89 % of the variance in international intent is still explained by factors other than comfort.

A straightforward check to evaluate the impact of surprise on intent was to calculate their correlation for both sexes: in neither case was the correlation significant. Surprise does not seem to affect international intention in either sex. On average women and men scored about the same in both initial international intent and international intent at 18 months. Women's initial intent was very highly correlated to their final intent (0.74). From this it can safely be said there is no evidence (measured in terms of their expressed intentions) that women are less inclined to undertake expatriate experience.

9.5.   EXPERIENCES MATCHING EXPECTATIONS

Our 'surprise' measure had a number of constants (e.g. 'home country', languages spoken etc.) that meant it was not suitable to measure eventual surprise. However the study did want to track to some degree how students felt their experiences on the course matched their expectations. This element of the surprise (called the 'Matchex' variable in the study) was measured at three points during the study (two months, six months and 18 months). A further variable, the degree to which students felt their experiences in Holland matched their expectations was introduced for comparison on the second questionnaire (called the 'Matchexh' variable in the study). Certainly the students' initial responses suggested that the extent to which the expectations matched experience was highly related to their initial comfort and this link continues over time.

Table 9.10. Correlation Experience matches Expectations and Comfort

	Comfort (at 2 months)	Comfort (at 18 months)
Experience match Expectations (at 2 months)	-.540** n = 54	.043 n=53
Experience match Expectations (at 18 months)	-.312* n = 54	-.417** n=53

When the sensemaking variables were regressed against these four 'Matchex' variables, both sense of coherence and brokerage appeared to be predictors as seen in Table 9.11 The most interesting results relate to how far experience matched expectation at 6 months where an R square of .22 regarding sensemaking elements was obtained i.e. a 22% of the variance explained - and here once again Sense of Coherence makes an apparently important contribution to experience matching expectation. Given Sense of Coherence measures feelings of predictability and control, it perhaps could be expected that high SOC would be related to a feeling that experience matched expectations. Socio- cultural Brokerage becomes an interesting predictor in the last measurement of how far experience meets expectations in that this is a negative relationship i.e. the higher someone measures on the broker scale the less their expectations were matched by experience. This is still a low level predictor and expectations being matched by experience are only measured by one item in the survey so caution should be taken in drawing assumptions from this. However it could be speculated that maybe attempting to act as a socio- cultural broker raises expectations that become harder to meet.

Table 9.11. Regression results Experience matches Expectations and Comfort

Dependent variable	R-Square	Independent: SENSE OF COHERENCE	Independent: BROKERAGE
		Standardized coefficients; Beta	Standardized coefficients; Beta
Experience match Expectations (at 2 months)	.087	.193	.206
Experience match Expectations (at 6 months)	.220	.463	.036
Experience of Nl. match Expectations (at 6 months)	.133	.309	.160
Experience match Expectations (at 18 months)	.107	.212	-.269

This area is interesting in that it seems to suggest that the higher the Sense of Coherence the more experience matches expectations and the higher the Socio-cultural brokerage the less experience matches expectations or vice versa. In other words, the two parts of the Sensemaking scale appear to give the impression that they may have diametrically opposite effects. These results are not statistically significant and so further study would need to be done to pursue this line of research that would have important implications for the role of socio-cultural brokerage in the model.

9.6. EFFECTS OF LANGUAGE

Language provision is one of the most enduring forms of expatriate preparation (Forster and Johnsen 1995). The study was interested to see how language ability this affected the model. When regressed against eventual comfort the number of languages spoken, and declared competence in Dutch and English all emerged as low level predictors of both Initial and Eventual comfort;

a) Dependent Initial Comfort, Independents: Language, Dutch English (R-square :.111, Standardised coefficients (Beta) Language:.126., Dutch: .238, English.:216.

b) Dependent Eventual Comfort, Independents : Language, Dutch English (R-square :.230, Standardised coefficients (Beta) Language:.250., Dutch.: .329, English.130.

This is an understandable result, with the predictive power of the course language, English, diminishing over time while the ability to speak a number of languages and declared competence in Dutch suggest a greater power to predict eventual comfort. It is over course simplistic to suggest that technical knowledge of a language or language acquisition may be all that is involved. This survey did not take into account e.g. familiarity with culture that may accompany such language acquisition.

9.7 DYNAMISM IN EXPATRIATION

To consider what movement could be observed in major variables the means of items in the Comfort scale were tracked. A summary of these is given in Table 9.12. Means for Comfort as a whole increased slightly (from 87.6 to 94.2) suggesting that students became more comfortable over the course of their time at the Rotterdam School of Management.

Further analysis showed those who stated to feel comfortable at first are not on the whole the same population as those who said so in the final questionnaire, suggesting a high degree of variability in the levels of comfort through time. This could imply that different variables might be producing different effects on comfort at the two points in time. An investigation of individual dimensions showed that this direction was not uniform. The mean on the Social integration scale and the mean on the Adjustment scale increased slightly (from 42.00 to 46.07 and from 30.18 to 31.89 respectively) between first and final questionnaires. Means on four of the items (satisfaction, at home, like and expect) decreased between the first and third questionnaires.

Both items measured three times (satisfaction, at home) and the item measuring how far expectations were matched by experience dipped even further at the time of the second questionnaire, as would be predicted by a U shaped adjustment curve.

Table 9.12. Satisfaction Item Means

	1st Responses		2nd Responses		3rd Responses	
N=63	Mean	Std Devn.	Mean	Std Devn.	Mean	Std Devn.
Comfort scale	87.6	12.5			94.2	14.1
Social integration scale	42.00	7.9			46.07	7.8
Adjustment scale	30.19	7.2			31.90	6.5
Satisfaction scale	4.9	1.0	4.2	1.5	4.5	1.4
At home scale	4.2	1.4	3.9	1.5	4.0	1.6
Like scale	3.7	1.7			3.4	2.1
Expectations /Experience scale	4.6	1.3	4.1	1.2	5.1	1.2

The item measuring how 'at home' students felt did not increase subsequently as would be predicted by such a curve, but such an increase was observed in the items measuring

how far expectations were matched by experience and satisfaction. This measure most resembled a predicted U curve according to adjustment theory.

The movements of these Dimensions in differing directions give some indication of how complex acculturation responses are. Sensemaking allows that for example, satisfaction can decrease while adjustment increases.

Because the movements are slight in statistical terms it is possible to say there is limited support for the sixth hypothesis: H6 Expatriate acculturation responses will vary over time, but this study was unable to observe a general trend or pattern in overall responses. This is entirely consistent with sensemaking theory that allows that significant input affecting acculturation responses can occur at any time and will be constantly reviewed.

9.8 SUMMARY OF MAIN FINDINGS

Firstly a brief indication of the findings relating to the Research Hypotheses is given below:

H1. An expatriate's initial comfort will be negatively related to surprise –some evidence was found for this (section 9.3.i)

H2 An expatriate's eventual comfort will be positively related to sensemaking elements. Some evidence was found for this in relation to Sense of Coherence (section 9.3.ii)

H3 An expatriate's eventual international intent will be positively related to sensemaking elements. No evidence was found for this. (section 9.3.iii)

H4 Sense of Coherence will be positively related to Socio-cultural brokerage. No evidence was found for this. (section 9.2.ii)

H 5 Eventual Comfort will be positively related to eventual International Intent – Some evidence was found for this (section 9.3.iii)

H6 Expatriate acculturation responses will vary over time. Some limited evidence was found for this.

In summary, the results suggest there are two factors which influence comfort in expatriation: Firstly, surprise has a negative effect on initial comfort which from then seems to become a self-fulfilling process: less comfort in the beginning of expatriation, less eventual comfort at the end. Secondly, the sensemaking element, Sense of Coherence has a positive effect on initial comfort, which in turn predicts eventual comfort. Initial

surprise is the best predictor of eventual comfort, which further leads to the impression that the foundation for eventual comfort lies in the start of the expatriate experience. No evidence was found that the sensemaking element of socio-cultural brokerage, as measured by this research, plays a part in the comfort or international intent of expatriates. Some other variables that were not an integral part of the original model (particularly language ability and gender) offered interesting results and suggest they could offer an interesting focus for further study.

Comfort is also a predictor for International intent but International intent was constant over time and in comparison to the strength of this other factors was relatively unimportant. This may well be related to the particular nature of this population.

CHAPTER 10: DISCUSSION -THIS STUDY IN PERSPECTIVE

10.1   INTRODUCTION

We identified a theoretical gap between literature concerned with macro-organisational issues in expatriation and literature concerned with the individual management of expatriation. The dominance of adjustment theory in expatriation was put into an historical context and how the changing nature of current expatriation experience required a shift in the application of adjustment theory was explained. In this research an attempt was made to explore how the theoretical gap between macro-organisational issues and the individual management of expatriation might be bridged using a sensemaking model. Qualitative methodology pointed to a number of inputs that might aid sensemaking and a hypothetical model was constructed to test these quantitatively. To investigate such a sensemaking model an attempt was made to measure surprise as a trigger for the sensemaking process. Potential sensemaking elements were then established. Two good candidates for such a model were considered – an established, apparently quantifiable concept, Sense of Coherence, and a concept from action anthropology, socio-cultural brokerage, that in early anthropological studies was identified using qualitative means. The study attempted to measure the effect of these elements on responses to expatriation in a group of people experiencing expatriation for a specialist reason – the pursuit of an MBA. In the next section (10.2) findings are summarized and discussed with respect to the hypothetical model developed in Chapter 6. Finally, methodological concerns and the theoretical limitations of the research are explored. The limitations of the methodology employed in the study, particularly the major measures used, are discussed in section 10.3. Concerns regarding the model and the theoretical base of the study as a whole are looked at in Section 10.4.

10.2. SUMMARY OF FINDINGS

This study set out to contribute empirically to the understanding of how sensemaking as a response to surprise consequent on expatriation impacts acculturation responses. Building

on previous acculturation research, particularly the cross-cultural literature, four broad questions were addressed.

Firstly, if an expatriate's comfort would be negatively related to surprise

Secondly, if an expatriate's response to difference or surprise was positively related to the presence of the sensemaking elements of Sense of Coherence and Socio- Cultural Brokerage. A secondary proposition within this question is whether Sense of Coherence and Socio-Cultural Brokerage are positively related. Thirdly, Acculturation responses as reflected in the expatriate's comfort and international intent would be positively related to sensemaking elements. Building on past adjustment literature, the study also looked to see if expatriate acculturation responses would display variations over time.

Our findings can be summarised as follows: First, some limited results suggested the initial comfort experienced by an expatriate was negatively related to surprise as measured by distance elements from their home country and last expatriate experience. While the combined sensemaking elements showed no significant relationship with surprise, a limited relationship was observed between the combined sensemaking elements with initial comfort. This relationship was strengthened when applied to Sense of Coherence alone. In this way Sense of Coherence can be seen as a potential factor in identifying particular internal characteristics that contribute to initial adjustment, in the tradition of early expatriate studies. An investigation of the relationship of Sense of Coherence with certain individual acculturation responses, particularly social integration, was especially significant (.526** at two months, .346** at 18 months). The relationship between Sense of Coherence and comfort was complex. Comfort appeared to increase over time but closer investigation of the statistics shows that different individual students were more comfortable at the end than at the beginning of the course. Sense of Coherence measures a pool of internal resources that tell you life will be manageable, comprehensible and meaningful. Antonovsky (1987) suggested it to be a relatively stable measure in adulthood. It could be that given the age profile of these students, some are experiencing real changes in their life that are working on their basic Sense of Coherence level. Some specialists working in the practical field of advising expatriates (Rigamer 1996) suggest random situational factors will outweigh internal strengths in determining the comfort of an expatriate. Antonovsky accepts that certain life changing experiences

can affect the SOC at a fundamental level, although suggests these are less likely to affect adults.

On the other hand studies using Sense of Coherence in other areas of challenge may provide an alternative suggestion as to why a strong Sense of Coherence mitigates early surprise. Perhaps Sense of Coherence relates to the speed and depth of adjustment required and that is why there is an initial relation with adjustment that is not seen as time progresses.

Studies of carers for people with dementia suggested that there is a threshold above which Sense of Coherence comes into play. 'The impact of the burden of dementia care giving and the protective effects of the SOC were initially tested in a study in Flanders (Belgium). This study revealed that carers with a strong SOC are less likely to manifest symptoms of distress and more likely to develop adaptive coping (Baro et al 1996). Surprisingly, the study found also a "threshold effect": the SOC is more protective in situations of greater burden, but makes no difference in situations of low burden. To reprise a popular exhortation: "When the going gets tough, the tough gets going"' (Baro & Meulenbergs (1999).

The implication is that the initial move and adjustment is extreme and this is when the impact of a strong Sense of Coherence 'kicks in'. As the adjustment task (burden) compared with the initial task reduces over the duration of the course the Sense of Coherence factor becomes dormant again or is redirected into the new task for this sample of finding the next international move.

With either perspective, the findings of the research can be seen as contributing some information in regard to Sense of Coherence as a predictor of social integration rather than establishing a workable measurement of sensemaking in action.

Socio-cultural brokerage was seen in the model as an additional potential mechanism for sensemaking but the study offered no proof of this. Socio-Cultural brokerage was found to have no significant relationship with Surprise or Comfort. Sense of Coherence and Socio-Cultural Brokerage were also not found to be significantly related. In this way, brokerage has not been shown to perform as a sensemaking element in this study as suggested by the model. There is general encouragement offered to expatriates to engage in socio-cultural brokerage in both academic and non-academic literature (e.g. Osland

and Bird 2000; Matson 1997; Pascoe 1992), and so it's lack of significance with comfort in this study is interesting and this aspect is discussed in detail in sections 10.3 and 10.4 both in terms of methodological and theoretical limitations.

The predictive power of gender together with surprise on initial comfort is interesting and contributes in small part to the growing body of literature concerning female expatriates and gender differences in expatriation. In this study, women's average Initial Surprise is lower than that of men. (Men's mean surprise = 230.98, Women's mean surprise = 220.47), and their Comfort is higher. But regression suggests that the impact of surprise on comfort is undeniably stronger in women in this sample. By the end of the course, this significant relationship between surprise and comfort in women has disappeared. Their comfort has also dropped slightly both absolutely and in relation to men. This may suggest a greater initial sensitivity to surprise, perhaps because of a greater recognition of initial difference. The results in this study suggest this initial sensitivity to surprise has no apparent effect on women's international intentions. However, great caution must be exercised in all speculation based on such a small sample together with reservations about the measures in general in this study which are discussed in Section 10.3.

In this study Comfort was found to be a predictor for International intent but International intent was constant over time and in comparison to the strength of this other factors were relatively unimportant. This may well be related to the particular nature of this population.

An attempt was made to see if acculturation responses changed over time, but results were limited and inconsistent in this regard. For example, the correlation between Social integration and Satisfaction decreases from an initial 0.57 to 0.24. Longitudinal studies are open to the fact that important variables will change over time. It could be at the start of the course social integration is important to the students in terms of their comfort. They then had an investment in the course with financial penalties coming to bear if they were to leave. This is no longer the case at the end when perhaps the pressures of job search override other aspects concerning general satisfaction. At this stage what may matter to the students is obtaining a job that justifies the investment in their MBA. It could be that MBA students at this stage are not basing satisfaction on adjustment but quite the opposite…the success of attempts to find the next international move. It could

also be this decrease indicates a more serious failing of the measures used and causes a questioning of the validity of the comfort scale.

10.3. DISCUSSION OF METHODOLOGICAL LIMITATIONS

The methodological limitations of the study fall into four main areas: the sample, the measures employed, linear relationships in the model and finally the influence the use on language has on such a study. The choice of quantitative methodology as a research tool for sensemaking is discussed in the section on theoretical limitations in section 10.4.

10.3.i Sample

The generalizability of the study should not be overestimated. In the first place because of its limited sample size and secondly because of the nature of expatriation in this sample. It is important at this stage to point out the sample was made up of people experiencing expatriation for a specialist reason. The self-selection of these expatriates for a limited period of time and for a specific purpose compromise the generalizability of the results due to the composition and size of the sample. On the other hand these particular circumstances led to certain presumed constant factors that may have aided the research: task in hand, motivation, length of placement.

At the same time, countering the constant factors in the study, it is important to recognise the impact that culture has on any such survey. A single grouping of such diverse nationalities almost inevitably leads to coalescence around the average, which severely compromises any results.

The cross-sectional nature of the sample needs examination. It has already been noted how the age range may affect Sense of Coherence scores over time for the age range of the sample (Antonovsky 1987). The sample was one third female, which is unusual in expatriate studies and does not reflect ratios in most other research. Despite the relatively high proportion of women in the sample, the sample size was not large enough to comprehensively examine the effects of gender that was observed. This is not unusual in studies of international women managers (Linnehan 1999; Fischlmayer 1999). The limited results observed would strongly point to the need for a longitudinal study of women expatriates.

10.3.ii Measures

The limited results achieved in this research have caused a careful consideration the measures used in the quantitative section of the study. It appears that while established scales in the study such as Sense of coherence and Social integration contribute information, all combined scales have weaknesses. Three combined scales; Surprise; Sensemaking and Comfort were considered. All three of these were weak and gave limited results. The main weaknesses of these scales were as follows:

The Surprise scale contained two parts, one fixed, one measured over three time periods. The fixed part components were selected on indications from past literature but inevitably cannot cover the wide range of surprise possibilities for any one individual. The weighting of the part of the scale considering to what extent expectations might be matched by experience probably under-emphasised the impact of relative surprise as experienced by an individual. It was found that although initially the fixed element of the surprise scale (measurement of difference between home and last expatriate experience and experience on the course) correlated significantly with how experience matched expectations, this relationship weakened over time. At the same time, the control element of experiences of the Netherlands matching expectations was more consistent (9.2.i), suggesting participants were making fine distinctions between areas of surprise. The measures in this study were not sufficiently sensitive to investigate this further but this difference indicates the subtle nature of how surprise is seen and the inadequacy of the measure to deal with such subtlety.

Our Sensemaking scale probably relied too much on Louis's categorisations that were drawn up on the basis of qualitative data. This meant two scales were used to cover Louis's categories, Socio- cultural brokerage and Sense of Coherence. These had no relation to each other and indeed sometimes had opposite relationships with other items. This may be due in part to methodological problem with their having been measured on two separate occasions.

Of the two components, Sense of Coherence appears to be the one with the best pedigree and gives the best indication of being a useful measure for the field of expatriation. Further studies may find it useful to test the three parts of the scale, Comprehensibility, Manageability and Meaningfulness separately to see if any of the three are particularly

relevant to sensemaking.

Socio- cultural brokerage was not related to any other variable. The measure in this study attempted to look at both the donation of brokerage and its receipt in a way that was not pre-determined by language. This attempt may have made the concept too elusive. Other concerns about the theoretical concept of socio-cultural brokerage are dealt with in section 10.4.

We would suggest then using these two sensemaking components together to form one total combined scale was not as helpful as using them separately.

Again the scale of Comfort consisted of 2 parts; a part based on proven scales of Social integration and Adjustment and another part consisting of the answers to 4 individual questions. Here again answers to the two parts of the scale sometimes moved in opposite directions. Although in some ways understandable in terms of sensemaking theory it brings about a situation where the scale of total comfort has to be discarded and relationships to its constituent parts only examined. In the examination of data in this way, the results are of limited value to the theory as presented.

Our fourth major measure, International Intent appears to have been useful as a measure; but was probably irrelevant for the sample. This exposes the limitation arising from the composition and size of the sample. The sample was experiencing a very specific sort of expatriation: self-motivated, of known duration and in the main believed to be with negative income. For this reason it would be unsafe to consider this population as representative of expatriates, although they do represent an often neglected group of self starters moving in pursuit of their own career. The international profile of this particular student population made it possible to use it in the investigation of this model, but clearly further study is required using a variety of people employed on international assignments. The strong persistence of this element in the study, apparently unaffected by Sense of Coherence at any stage poses an interesting question about to what extent Sense of Coherence can influence or affect strong motivators. This study cannot answer this and this is another potential area for future research.

Although all three combined scales showed internal validity, there was limited opportunity to pilot the scales and this may well have affected their applicability. Surprise and comfort are complex relative concepts and it would appear the components used

were too arbitrarily combined. It is recommended these combined scales be discarded in future studies in favour of the more tested and reliable component parts (e.g. Sense of Coherence, Social Integration). The greatest concern and interest is reserved for the Socio-cultural brokerage scale because of its failure to produce any significant result. This lack of performance is further discussed in the next section on theoretical limitations (10.4).

10.3.iii Linear Relationships

The quantitative study and use of questionnaires was constructed to study possible linear relationships between variables. Throughout the study the complex nature of the phenomenon under investigation has been emphasised and it may be possible that the study is related to and affected by levels of change as described by Tinsley and Weiss (1975: 2001). They develop a distinction between reliability and agreement, saying that these are essentially different concepts that require different assessment techniques. They argue there are a number of types of change that can be measured at different levels. The study was interested in what is seen as first and second order change. First order change involves simple increases and decreases (linear) effects. So for instance this would be to consider if increased socio-cultural brokerage leads to increased acculturation, a relationship not established in the results.

On the other hand, second level change has to do with changes in the relations between variables. In this case it could be suggested that increased socio-cultural brokerage leads to increased acculturation, but the influence of such brokerage has an effect on the respondents perception of their acculturation. It could lead the respondents to become more aware of the immense cultural gap they have to bridge and therefore they 'feel' as if they still have to go a long way. In such circumstances a questionnaire such as ours would not measure a linear effect, and this research was not designed to assess second order effects by measuring a change in the factor (covariance) structure of the data.

It appears likely the complexity of relationships within the model was underestimated and this in turn suggests a need to return to examine initial premises in the model. This is discussed in Section 10.4.

10.3.iv Language

The concept of sensemaking in expatriation is challenging methodologically. In particular, Peltonen (1998) has pointed out the importance of language as a mechanism in sensemaking. He also recognises the fact that the social nature of language imposes methodological problems in the investigation of sensemaking. "'Though obviously intended to report authentic experience, the way experiences are given socially acceptable form in language in interviews is dependent on sensible and acceptable vocabularies for describing subjective experience. In formulating feelings of 'culture shock', for example, one is already 'ordering away' some of the original anxiety by making it socially intelligible."

A feeling previously experienced in practice is relieved when identified. A phenomenon having a 'name' gives it some sort of credibility and normalcy. The importance of language is shown by what happens when it then acquires an alternative meaning by a credibility imposed by a particular setting e.g. A Belgian living in the Netherlands who had previously lived in Portugal spoke of the great differences she perceived between the two Low countries. The following statement refers not just to her own adjustment experience but also to a difference in the way she considered the term 'culture shock' which was given legitimacy by it's acceptance in the academic institution where she now worked. " Until I came here I thought culture shock was something middle-aged American women felt when they could not easily get their thanksgiving fare at the commissary." (SD11997)

The known methodological difficulties the use of language imposes on investigations into sensemaking affect both quantitative and qualitative research to some degree. The possible shortcomings of quantitative methodology for an investigation of sensemaking are however recognised. Difficulties involved with cross-cultural research (Tayeb 1994) become exacerbated by the attempt to apply cross-cultural measures to individual meaning. For this reason the illustrations given throughout this study suggest that such a qualitative approach may have some merit. The language of the questionnaire itself may be problematic. The respondents had many different native languages; all were used to some degree of English as business/ academic language. They could translate the English of the survey questionnaires back into their own native tongue; but the real meaning of

questions asked -and answers given-may not have come across in relation to certain areas (e.g. cultural values and job characteristic questions: Harzing et al 2002).

It may also be however that the use of language is so fundamental to the sensemaking process- ' How can I know what I think until I see what I say?' (Weick 1995:18) that that this type of quantitative research was unlikely to render significant results that could capture such a complex mercurial phenomenon.

10.4. DISCUSSION OF THEORETICAL LIMITATIONS

The inadequacy of the measures and other methodological limitations given above leads to a review of the choice of quantitative methodology for this study and in turn causes a questioning of the theoretical basis of the study.

This study can be broadly split into two parts. The first part is a descriptive, theoretical part containing substantial qualitative data in the form of anecdotal testimony suggesting a sensemaking framework is applicable to expatriation. The second, the quantitative research fails to reflect this, offering no support for the sensemaking framework described in the theoretical model. Why? It has already been commented in depth that it might be that the measures of the study were inadequate, but it must also be considered that major elements in the model might not take the form suggested.

Of all aspects of the model, it is the lack of significance of socio-cultural brokerage that most calls the model into question. It may be that the inputs identified in the hypothetical model are not important, that other issues are paramount. Why then do international relocation training courses and volunteer groups emphasise the qualities of exchange of information and contacts seen in the concept of Socio-cultural brokerage? Is this advice based on myth and legend? Is it that these have a historical value but in a modern world economy other coping mechanisms and inputs are appropriate?

Brokerage behaviour is often encouraged and recommended for expatriates, but it is possible it that it might lead to a distortion in the individual's perception of how acculturation is progressing or, alternatively, to failed expectation. If expatriates attempt to adopt brokerage behaviour and they are unable or unsuccessful in this it may affect the degree to which their expectations are met, and so trying to act as a broker may actively produce negative responses.

This study adopted the approach from Boissevain that all men can be brokers, but any subsequent competition between brokers was not considered. Perhaps in the case of economic brokerage, a market can only maintain a certain number of brokers, and this may also hold true for also true for socio-cultural brokers. If there is competition for brokerage positions this will mean there are 'failed brokers' whose unmet expectations will also be reflected in their comfort on assignment. Or it could also be that people become accustomed to the donation and receipt of brokerage, so that it is an input that is devalued on subsequent expatriate assignments.

Alternatively the sample in this study may be a special case. Maybe the relatively short term and fixed nature of their expatriate experience influenced behaviour. They were in a transient expatriate situation where maybe traditional brokerage and means of brokerage are not appropriate or available.

At the time the study was carried out there had been relatively little work on the concept of mentoring in expatriation, although since that time this area has received growing interest with the suggestion that it can contribute significantly to the process of adjustment (Feldman and Bolino 1999; Harvey et al 1999). Mentoring in some form represents one half of the exchange relationship in brokerage. Far more is still known of the effects of receiving rather than donation of mentoring. This study was more geared to the donation of mentoring

and further work to compare the results regarding donation rather than receipt of brokerage would be interesting. This directive use of language mentioned in section 10.3. may have some influence on work regarding mentoring. To ask people to identify persons who contributed to their well being or job performance on expatriation focuses attention on such people whose influence, though great, might otherwise remain in the background. The results arising from work on mentoring (Feldman and Bollino 1999; v/d Sluis 2000) may warrant a review of the brokerage instrument used in the study to include more explicit mentor input.

In addition it may be that sensemaking inputs are important but are influenced by other factors. As an example, while completing the study the author relocated internationally. Her involvement in this study meant she was particularly sensitive to brokerage activity during the move. While this is only one situation, it was evident that substantial informal

brokerage helped the process. However, when informal brokerage was not matched by organisational brokerage, the comparison became a reason for dissatisfaction. When most effort is arising informally it throws the lack of formal brokerage into greater relief (resembling Louis' concept of contrast as surprise). This then can trigger sensemaking where negative responses are promoted.

All the above reservations regarding how this study envisioned brokerage consider difficulties with applying the concept. A further reservation questions the concept of socio- cultural brokerage itself. This reservation is based firstly on the recent work by Mendenhall and Stahl.(2000). They have considered the role of what it could be suggested are acts of brokerage in expatriate training and development and suggest these represent 'real time learning'. " Expatriates need training in 'real time'; they need cross cultural training-or some other form of personal assistance "on the fly""(2000:252). 'Real-time', 'on the fly' or 'just-in-time' - learning are phrases borrowed from industry to describe the changes that have taken place in the communication and delivery of learning resources. In their application of this concept of 'real-time learning' to expatriation, Mendenhall and Stahl. (2000) advocate personal coaching, which they note is a highly individualized instrument and task-orientated with a focus on concrete problems (2000:255). From this it can be considered that 'real time learning' is random and embedded in situation and task rather than being related to an individual disposition as suggested by this study. It may be that in finding a suitable input to cover the input of others and local interpretation schemes as suggested by Louis (1980) socio- cultural brokerage is not appropriate, but rather an element should be sought that relates to distinct or discrete occurrences that are not person- specific. It may not be possible to identify individuals who will be affected by such input that may occur randomly over a complex variety of situations and areas. If the narrative data in this study is critically examined, socio-cultural brokerage appears an important factor in expatriation comfort, but there is no real evidence that has to be centred in individuals. Even in some of the anecdotes and stories reported in this text some of the most powerful sensemaking comes in the absence of brokers... even because of it as in the example described in section 3.3 SD7 (Page 46). One possible route of further enquiry in this area would be to investigate how sensemaking concepts apply to the experience of learning. If learning is a result of

two things: an individual who is open to learn and a situation which has learning characteristics; and circumstances can be envisaged where no one acts as a broker; the situation itself provides the sensemaking opportunity.

In this perspective, although brokers are not needed to make sense of a situation or to learn how to cope with it, certain types of situation are likely to result in more sensemaking/ learning than others (McCauley 1994). "…….a manager learns optimally in situations in which traditional behaviour and routines do not work any more. Challenges force a manager to try out new behaviour and experience the consequences of this behaviour. In sum: Managers learn by experience, even if they fail to learn at once, because development based on new experience compels to "sink or swim" (v/d Sluis and Hoeksema 2001).

If brokerage is situational or task related, it's encounter and application could be involuntary, random or chance. Perhaps rather than taking Boissevain's theoretical stance that 'all men can be brokers' this study should have considered the theoretical stance that 'all situations provide the possibility of brokerage'.

A final basic reservation with this study's initial concept of sensemaking as a whole comes from further work by Weick who is quoted widely in setting up the study's model. Weick sees the structuring of the unknown as a process that is first anchored in beliefs or actions and then connects beliefs and actions, beginning with whichever is clearer. He suggests that beliefs can inform actions or actions inform beliefs and it is relatively immaterial where the process begins. A good example of this in expatriate terms is found in Suutari's (2003) study of the early career orientation of 24 Finnish 'global managers'. Through interviews the managers were divided into those who 'had actively searched for possibilities of leaving on international assignments and had been interested in international issues over a long period'(Suutari 2003: 193), and those whose first decision was based on company needs appearing within the company. He found " What is common to the experiences of both these groups of managers is the fact that their first international assignment was successful and managers had found the international working environment interesting and inspiring but also demanding and challenging. Thus the international assignment was perceived to be an excellent learning and development experience" (Suutari 2003: 202). Whether the managers believed an international career

was attractive and acted accordingly or whether by their actions they discovered " An international environment is like a special spice in your work. It makes the work more challenging and demanding" (Suutari 2003:194) was immaterial to the process of becoming an international manager.

Now Weick has developed this into the idea of 'thinking by doing' (Weick, Sutcliffe, and Quinn 2001). Commenting on his work on highly reliable organisations working in highly volatile situations he suggests, "It's not, Think, then act. Instead, it's, Think by acting. By actually doing things, you'll find out what works and what doesn't." (Hammonds, 2002:124). Expatriates often experience shifting volatile conditions and maybe the basis of their sensemaking cannot be narrowed to particular sensemaking elements but rather to a process of acting out their thinking using any and all available resources. That may or may not include past experience, internal strengths the input of others or local schemes providing interpretation. However the presence of any or all of these may later be incorporated into a justifying description of what happened when they 'thought by doing'.

10.5   INDICATIONS FOR FURTHER STUDY

The results of the quantitative study do not offer significant support to the theoretical model of sensemaking as a mechanism in expatriation. In view of this, does the concept have any future relevance to studies of expatriation? This study adopted quantitative methods to examine sensemaking in expatriation for two major reasons. It was felt that as the concept both built on and to some extent challenged existing adjustment theory in contemporary business environment, it would be useful to attempt a study that contained the methodology familiar in such literature. Further the lack of hard data as opposed to anecdote in the area of expatriation is often observed, and the opportunity to test theory quantitatively was welcomed. The possible shortcomings of this methodology for an investigation of sensemaking were however recognised. Essentially an internal process, the quicksilver nature of sensemaking has meant that sensemaking studies in other areas have concentrated on self-reporting techniques, critical incident analysis and storytelling. Weick (1995) himself advocates storytelling and it's analysis. Expatriation is a special case. Alongside of increasing academic research literature there is a growing body of

handbooks, biographies and 'eyewitness' documentary evidence seeking to offer advice and information regarding the expatriation process to interested parties.

This parallel literature has been drawn on in the qualitative research utilized to examine sensemaking in expatriation. Of major importance in this field is the growth of information, advice and recollection of experience available via the Internet. In an international field where geographical boundaries are particularly important, a resource that crosses those boundaries with impunity now provides a major input in preparation for and experience of expatriation. Its academic relevance with regard to expatriation is still in its infancy (Glanz, v/d Boon and Hoeksema 2000; Mendenhall and Stahl 2000). It is suggested that the methodology associated with other studies in sensemaking, such as the analysis of diary material and critical incident analysis, may prove fruitful in this area. While quantitative methods are required to serve as an initial attempt to explore the relevance of sensemaking theory in expatriation, sensemaking as a process may be elusive using such methods and alternative qualitative methods or combinations of quantitative and qualitative methods may prove more appropriate. Further study involving qualitative methods should be adopted to examine sensemaking in expatriation to see if the model produces insights via these methods.

As a final note, a comment is once more made on the changing nature of expatriation in an increasingly unstable and unpredictable business environment. At the start of this study, expatriation was a relatively under-researched area of organization and management. Changes in business practice in the last 5 years has led to a situation where the experience of expatriation has moved from being seen as a somewhat unusual and rarefied experience to one that is a regular, 'normal' and even expected business reality. Along with this acceptance of expatriation in everyday business life, there has been an abundance of experimental, innovative and radical ways of experiencing expatriation. There has been an explosion of research interest in the subject; with the area developing it's own specialised knowledge and resources. If a return is made to the theoretical gap identified between literature concerned with macro-organisational issues in expatriation and the then prevailing adjustment literature concerned with the individual management of expatriation, this study begins to represent an historical link in the process of expatriation research. In many ways, the fact that the study failed to establish a

quantitative model of sensemaking has been overtaken by the interest in the exploration of alternative qualitative methodology in expatriation (Hippler 2000; Peltonen 1999; Watson, Peirce, and Rosen, 2001). It could be that the key to better understanding of expatriate experience will be found by the application of these qualitative methods in this area.

SAMENVATTING

Dit onderzoek bestudeert hoe expatriates verstandig gebruik kunnen maken van hun ervaringen met het leven en werken in het buitenland. Het onderzoek dat in dit document beschreven wordt, gaat er van uit dat een expatriation sensemaking model een alternatief biedt voor de lineaire theoretische aanpassingsmodellen (Oberg 1960) die toegepast worden bij de expatriation theorie. In het verleden benadrukte de aanpassingstheorie integratie en zekerheid en het is moeilijk om de gangbaarheid van deze modellen los te koppelen van traditionele vormen van expatriatioin , d.w.z. van de gesponserde plaatsing in het buitenland voor een beperkte termijn. Echte, moderne globale zakenomgevingen zijn van nature veranderlijk. Het strategisch onderzoek dat macro-organisatorische kwesties bij de internationalisering nu behandelt, benadrukt het management van kennis, structuur en hulpbronnen vanuit het perspectief van onzekerheid. Deze studie veronderstelt dat alle overplaatsingen van expatriates onderworpen zijn aan verwarring en verandering, maar tegelijkertijd ook een zekere orde bevatten. Dit verschilt van conventionele studies die aannemen dat overplaatsingen in principe georganiseerd zijn maar daarbij ook enige ongeorganiseerdheid vertonen. De studie biedt daarom een alternatief voor de lineaire theoretische modellen die gebruikt werden bij expatriation door het aanbieden en testen van een theoretisch perspectief , gebaseerd op een"sensemaking model". Het hoofddoel van de studie is een antwoord te krijgen op de vraag of sensemaking elementen bij verrassing in expatriate situaties, gerelateerd zijn aan acculturation responses.

Sensemaking is het proces dat plaats vindt wanneer een individu rationele, bewuste middelen gebruikt om te kunnen omgaan met de verwarring die ontstaat bij nieuwe situaties. De sensemaking theorie (Weick, 1995) beschouwt dat mensen handelen op

basis van geprogrameerde draaiboeken. Bij nieuwe gebeurtenissen, speciaal wanneer deze overeenkomst vertonen met een eerdere ervaring vallen zij terug op deze draaiboeken als hulpbron om actie te bepalen. Soms kan zich een nieuwe toestand voordoen die niet overeenkomt met de draaiboeken van eerdere ervaringen, hetgeen resulteert in niet beantwoorde verwachtingen en verwarring over de overeenkomst van eerdere gebeurtenissen met de recente situatie. Dit is wat verrassing genoemd wordt. Sensemaking is het proces waarbij gebruikt gemaakt wordt van bewuste rationele overwegingen om de situatie te her-analiseren en orde te scheppen in deze verwarring en verrassing.

Dit blijkt een concept te zijn dat een werkbaar kader vormt voor het bestuderen van de onzekerheid en de instabiele omgevingen die expatriates ontmoeten. Expatriates worden in deze studie gedefinieerd als ' mensen en families die internationaal verhuizen om een carriere op te bouwen'. Weick beschrijft (1995) zeven eigenschappen van sensemaking. Hij zegt dat het proces is: gebaseerd op de vorming van individule identiteit; retrospectief; actief met het bouwen van nieuwe omstandigheden; sociaal ; aanhoudend; gefocussed op en door aanknopingpunten; eerder gedreven door plausibilteit dan door nauwkeurigheid..

De studie geeft een duidelijk beeld van de werkelijke ervaringen van expatriates. Dit verklaart het belang van deze eigenschappen en de relevantie van sensemaking op dit gebied. Deze studie beschouwt hoe sensemaking wordt "getriggered" door de verrassingen, die inherent zijn aan expatriation. Vervolgens beschouwt het sensemakingelementen, dus die inputs die sensemaking bewerkstelligen, hierbij gebruikmakend van het werk van Louis (1980) bij de socialisatie van nieuwkomers. Louis somt vier belangrijke inputs op die betrekking hebben op het sensemaking proces. Deze zijn algemene persoonlijke kenmerken, ervaringen uit het verleden, invloed van anderen en plaatselijk beschikbare interpretative plannen.

Deze studie stelt dat twee onderdelen; de sense of coherence en socio-culturele makelarij gebruikt kunnen worden om de sensemaking bij expatriation te beinvloeden . De sense of

coherence vertegenwoordigd Louis' algemene persoonlijke kenmerken en inputs van ervaringen uit het verleden, terwijl socio-culturele makelarij gebruikt wordt bij de invloed van anderen en plaatselijk beschikbare interpretative plannen.

Het eerste onderdeel, Sense of coherence, wordt door Antonovsky beschreven als "een globale oriëntatie die de mate uitdrukt waarin men een doordringend, voortdurend doch dynamisch gevoel van zelfvertrouwen heeft , dat de interne en externe omgeving voorspelbaar zijn en dat dingen zullen uitwerken naar wat redelijkerwijs verwacht mag worden" (1987:19). Deze studie gebruikt Antonovsky's wijdverbreide kwantitatieve schaal die drie componenten bevat: duidelijkheid, handelbaarheid en meaningfulness, bedoeld om de mate van coherentie te meten. In deze benadering dienen stressveroorzakers niet alleen in de context van "mitigators, buffers en moderators" gezien te worden maar ook als "motivators, movers" enzovoort.

Het tweede sensemaking onderdeel is de Socio-culturele makelarij. De term 'cultuur makelaar' is hoofdzakelijk bekend op het gebied van antropologie om mensen te beschrijven die in staat zijn culturen te overbruggen en die in feite handelen als agenten van verandering. Makelaars in een expatriate situatie beseffen wat de strategieën van Louis (1980) in haar sensemaking model voorstellen. Als 'experts ter plaatse' komen zij tussenbeide ten tijde van verrassing, hetgeen natuurlijk en vernieuwend is, om te helpen de situatie te verklaren, in plaats van te proberen om verassing te voorkomen. Zij kunnen de expatriate helpen de betekenis van de gebeurtenissen die zich ontvouwen te begrijpen. Omdat er geen bestaande maatstaf beschikbaar was heeft deze studie geprobeert een maatstaf van socio-culturele makelarij te construeren om te onderzoeken of dit element en de sense of coherence bij expatriation een acculturation respons zou kunnen bewerkstelligen.

Reacties in termen van sensemaking zijn de stadia van het proces waarbij begrip actie beïnvloed heeft. Dit zijn de momenten waarbij interpretative plannen tot uitdrukking komen bij actie en houding. Gebruikmakend van een sensemaking model kan de expatriate de omstandigheden bij nieuwe ervaringen continue evalueren. Indien een bestaande interpretatie weerlegd wordt, is een herzien plan vereist. Op zijn beurt zal dit

de acties beinvloeden. Bij gevolg kan dit er weer toe leiden dat zij hun tevredenheid met de huidige situatie herdefinieren en hun behoeften en verwachtingen opnieuw bepalen. Sensemaking leidt tot komplexe veranderingen in aanpassing en acculturation, niet alleeen omdat er meer informatie en inzicht komt en het leven gemakkelijker wordt, maar ook als antwoord op de betekenis die door de expatriate aan zulke stimuli wordt gegeven.

Als dynamisch en vloeiend proces verschilt sensemaking van de manier waarop modellen van sociale leerprocessen en onzekerheidreductie vroeger met betrekking tot expatriation werden toegepast. Sensemaking betekend zowel een stijgende leercurve richting een ver ideaal doel en heeft betrekking op situaties waarbij alle vorige opgedane kennis door nieuwe input wordt vervangen. De meest erkende referentiekaders die beschikbaar zijn voor deze reacties of 'uitkomsten' zijn te vinden in de aanpassingsliteratuur als vergankelijke acculturation kaders.
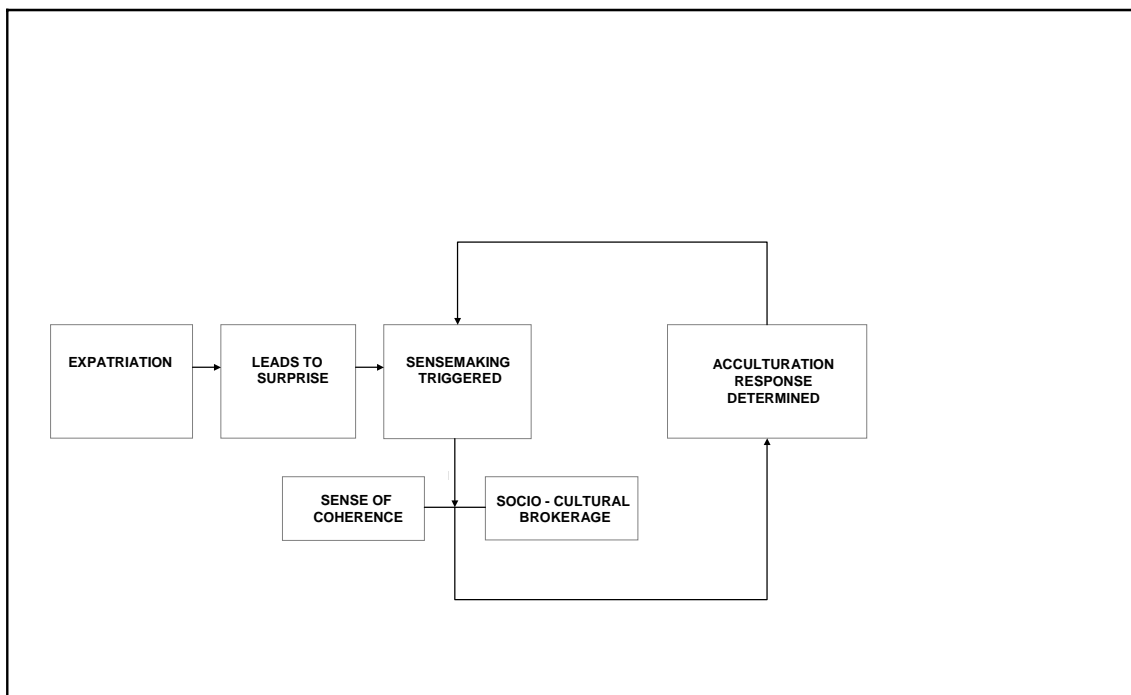
Figuur. 1 'Sensemaking as a dynamic process in expatriation'

De methodologie was problematisch in deze studie vanwege de bepert beschikbare maatstaven om de steeds veranderende natuur van sensemaking vast te stellen. Besloten

werd om niet alleen kwantitatieve methoden te gebruiken die het mogelijk maken vergelijkingen te maken met studies uit het verleden maar ook om de studie te illustreren met verhalen over ervaringen van expatriates. Figuur 1 beschrijft schematisch hoe verassing bij expatriation sensemaking zou kunnen "triggeren" waarvan de uitkomsten aangepast worden door middel van sensemaking elementen in een dynamisch proces onderhavig aan een constante herwaardering.

Dit longitudinaal onderzoek werd uitgevoerd door gebruik te maken van gegevens uit de "intake" in 1997 van 112 voltijd studenten aan de Rotterdam School van Management MBA uit 27 verschillende landen. Zij waren een zeer internationale groep met aanzienlijke buitenlandse ervaring en die behalve 5 studenten allen studeerden en leefden in een ander land. Over een periode van 18 maaanden werden drie vragenlijsten bij drie gelegenheden verdeeld. Difference underlying Surprise, Sense of coherence en Socio-culturele Makelarij als Sensemaking elementen en de acculturation respons van Comfort and International Intent werden voornamelijk gemeten door middel van Likert-type vragen.. Zes Hypothesen werden beschouwd: Een expatriates aanvankelijk gevoel of behagen wordt negatief gerelateerd aan verrassing. (H1); Een expatriates uiteindelijke gevoel of behagen wordt positief gerelateerd aan sensemaking elementen. (H2); Een expatriates uiteindelijke International Intent wordt positief in verband gebracht met sensemaking onderdelen. (H3);Sense of Coherence bedoeling wordt positief in verband gebracht met Socio-culturele makelarij. (H4); Eventueel gevoel van komfort wordt positief gerelateerd aan de uiteindelijke International Intent(H5); De acculturation responses van de Expatriate zullen wisselen over de tijd. (H6).

De resultaten van het onderzoek veronderstellen dat er twee factoren zijn die het gevoel van behagen bij expatriation beïnvloeden: Ten eerste, verrassing heeft een negatief effect op het aanvankelijk gevoel van behagen, dat daarna een self-fulfilling proces schijnt te worden: minder het gevoel van behagen aan het begin van de expatriation, minder uiteindelijke komfort aan het einde. Ten tweede, het sensemaking element, heeft Sense of Coherence een positief resultaat op aanvankelijke het gevoel van behagen , die op zijn beurt weer een uiteindelijk het gevoel van behagen voorspelt. Sense of Coherence kan

gezien worden als een potentiele faktor die bijzondere interne kenmerken identificeerd en welke bijdragen tot een aanvankelijke aanpassing, in de traditie van eerdere expatriate studies. Aanvankelijke verrassing is de beste voorspeller van uiteindelijk het gevoel van behagen, die verder tot de indruk leidt dat het fundament van uiteindelijk het gevoel van behag ligt bij het begin van de ervaringen van de expatriate. Geen bewijs werd gevonden dat het sensemaking element van socio-culturele makelarij, zoals gemeten in dit onderzoek, een rol speelt bij het gevoel van behagen en International Intent van de expatriate. Het het gevoel van behagen is ook een voorspeller van International Intent, maar International Intent was konstant over tijd en in vergelijking tot andere faktoren betrekkelijk onbelangrijk. Een poging is gedaan om te zien of acculturation responses over tijd veranderderden, maar de resultaten waren beperkt en inconsistent in dit geval.

Ondanks de uitgebreide kwalitatieve gegevens, ter illustratie geciteerd in deze studie in de vorm van een anekdotische getuigenis, biedt dit kwantitatieve onderzoek geen onder steuning voor het sensemaking kader dat in het theoretische model beschreven wordt. Deze afwezigheid van ondersteuning voor een sensemaking model zou het gevolg kunnen zijn van problemen met het theoretische model of met de maatregelen die hierbij gebruikt werden. Terwijl kwantitatieve methoden vereist zijn om te dienen als een eerste poging de relevantie van de sensemaking theorie bij expatriation te onderzoeken, zou sense making als proces bij het gebruik van dergelijke methoden ongrijpbaar kunnen zijn. Alternatieve kwalitatieve methoden of een combinatie van kwantitatieve en kwalitatieve methoden zouden beter toegerust zijn bij toekomstige studies.

APPENDICES
Appendix 1. Summary of major scale items

SCALE	SAMPLE ITEM	No OF POINTS ON SCALE	NUMBER OF ITEMS	No. OF QUES TIONN AIRE	1ST RESPONSES		LAST RESPONSES		ALPHA (matched sample, first responses)
					Mean	Std Devn.	Mean	Std Devn	
Difference scale	Incl. Dimensions of culture (Hofstede) KLM flight hrs, length of previous expatriate experience etc.		14	1					.7694 n=62
Experience = Expectations	To what extent do you feel what you thought life in general would be like while on the MBA course has been matched your experiences so far?	7 Range= 0-7	1	1,2,3					
TOTAL Surprise	Composite scale of difference and experience = expectations	Range = 0 - 418	15	1,3	227.8	92.32	227..3	91.85	.7106 n=62
Brokerage	Helping newcomers to settle in costs me money or other resources Not true….very true	7 Range = 0-98	18	2	91.57	12.69			.8614 n=63
Sense of Coherence	Has it happened in the past that you were surprised by the behaviour of people whom you thought you knew well? Never happened…..always happened	7 Range = 0-126	14	1	67.25	9.39			.7701 n=63
TOTAL Combined	*composite scale of brokerage and SOC	7 Range = 0-224	32		158.8	16.42			.8211 n=63
Social Integration	In terms of living in this country how able do you feel you are… in empathising with another person?	7 Range= 0-84	12	1,3	42.00	7.9	46.07	7.8	. 9217 n=59
Adjustment	How adjusted are you… to the cost of living at this location?	7 Range = 0-63	9	1,3	30.19	7.2	31.90	6.5	.8770 n=58
Satisfaction	To what extent do you agree with the following statement ; I am satisfied with life here	7 Range= 0-7	1	1,2,3	4.86 2nd Q 4.17	1.01 2nd Q 1.45	4.. 5	1.37	
At home	To what extent do you agree with the following statement: I feel at home in this country	7 Range= 0-7	1	1,2,3	4.24 2nd Q 3.92	1.40 2nd Q 1.47	3.98	1.64	
Like	I would like to stay in Holland at the end of my course. completely disagree….completely agree	7 Range= 0-7	1	1,3	3.65	1.67	3.38	2.1	
Expect	I expect to stay in Holland at the end of my course. completely disagree…completely agree	7 Range= 0-7	1	1,3	3.19	1.7	3.12	2.0	
TOTAL Comfort	* composite scale of acculturation measures	7 Range= 0-175	25	1,3	87.63	13.52	94.15	15.38	.8690 n=54
International intent	I would like my first job after my MBA to be in a foreign country Very true…not true at all	7 Range= 0-42	6	1,3	33.73	7.73	33.42	7.80	N=63 .7769

Appendix 2 Values for Hofstede's four dimensions of culture

Country	PDI	UAI	IDV	MAS
Arabic World (ARA)	80	68	38	52
Argentina (ARG)	49	86	46	56
Australia (AUL)	36	51	90	61
Austria (AUT)	11	70	55	79
Belgium (BEL)	65	94	75	54
Brazil (BRA)	69	76	38	49
Canada (CAN)	39	48	80	52
Chile (CHL)	63	86	23	28
Columbia (COL)	67	80	13	64
Costa Rica (COS)	35	86	15	21
Denmark (DEN)	18	23	74	16
Eastern Africa (EAF)	64	52	27	41
Ecuador (ECA)	78	67	8	63
Elsalvador (SAL)	66	94	19	40
Finland (FIN)	33	59	63	26
France (FRA)	68	86	71	43
Germany (FRG)	35	65	67	66
Great Britain (GBR)	35	35	89	66
Greece (GRE)	60	112	35	57
Guatemala (GUA)	95	101	6	37
Hong Kong (HOK)	68	29	25	57
India (IND)	77	40	48	56
Indonesia (IDO)	78	48	14	46
Iran (IRA)	58	59	41	43
Ireland (IRE)	28	35	70	68
Israel (ISR)	13	81	54	47
Italy (ITA)	50	75	76	70
Jamaica (JAM)	45	13	39	68
Japan (JPN)	54	92	46	95
South Korea (KOR)	60	85	18	39
Malaysia (MAL)	104	36	26	50
Mexico (MEX)	81	82	30	69
Netherlands (NET)	38	53	80	14
New Zealand (NZI)	22	49	79	58
Norway (NOR)	31	50	69	8
Pakistan (PAK)	55	70	14	50
Panama (PAN)	95	86	11	44
Peru (PER)	64	87	16	42
Philippines (PHI)	94	44	32	64
Portugal (POR)	63	104	27	31
Singapore (SIN)	74	8	20	48
South Africa (SAF)	49	49	65	63
Spain (SPA)	57	86	51	42
Sweden (SWE)	31	29	71	5
Switzerland (SWI)	34	58	68	70
Taiwan (TAI)	58	69	17	45
Thailand (THA)	64	64	20	34
Turkey (TUR)	66	85	37	45
United States (USA)	40	46	91	62
Uruguay (URU)	61	100	36	38
Venezuela (VEN)	81	76	12	73
West Africa (WAF)	77	54	20	46

Appendix 3: Demographic information items on questionnaires

Please give the following information by filling in the blanks or circles

Age : Under 25   25-35   35-45   45-55   Over 55

Gender: Male   O   Female   O

Please fill in the circle which best describes your family status
a.)	Single		O
b.)	Partner	Living with you in Holland	O
		Living elsewhere	O

Number of Children
Living with you in Holland   ……….…… Living elsewhere……………….

How long have you been living in Holland?
_____years_____months
What is your home country? _____

In what country(ies) did you grow up (Between the ages of 1-18) _____

Prior to this course were you living in a country that was neither your home country nor Holland? Yes   O   No   O

If yes, please state which country_____and number of years resident in total_____

Prior to this course, how many years have you spent travelling, working and or living in foreign countries?………………years

If you have had previous foreign country experience, how intense was that experience?

> Very intense – e.g. studied or worked abroad
> Somewhat intense – e.g. lived abroad but spent most time with people from my own nationality e.g. on an army base
> Minimally intense – travelling with home country friends or family

If you had foreign country experience, to what extent were the cultures similar or different from Holland?
mostly similar   1   2   3   4   5   6   7   mostly different

Counting your mother tongue which languages do you speak and to what level?
Language: Native speaker   Fluent   Conversational   Intermediate Basic

Appendix 4:   Items measuring Satisfaction, feeling at home, match expectations, like and expect to stay in the Netherlands.

To what extent do you agree with the following statements:

I am satisfied with life here:
 completely dissatisfied ---------1 2 3 4 5 6 7 ---------- completely satisfied

I feel at home in this country:
 to a very great extent---------1 2 3 4 5 6 7 ---------- not at all

To what extent do you feel what you thought life in general would be like while on the MBA course has been matched by your experiences so far?

to a very great extent---------1 2 3 4 5 6 7 ----------not at all

Appendix 5:   14 Item scale measuring Sense of Coherence

1.   Has it happened in the past that you were surprised by the behaviour of people whom you thought you knew well?
never happened   ---------1 2 3 4 5 6 7 ----------always happened
2. Do you have the feeling that you don't really care what goes on around you?
very seldom or never---------1 2 3 4 5 6 7 ----------very often
3. Has it happened that people whom you counted on disappointed you?
never happened   ---------1 2 3 4 5 6 7 ----------always happened
4. Until now your life has had:
no clear goals or purpose at all--------1 2 3 4 5 6 7 ----------very clear goals and purpose
5. Do you have the feeling that you're being treated unfairly?
very often--------1 2 3 4 5 6 7 ----------very seldom or never
6. Do you have the feeling that you are in an unfamiliar situation and don't know what to do?
very often--------1 2 3 4 5 6 7 ----------very seldom or never
7.   Doing the things you do every day is:
a source of deep pleasure and satisfaction-------1 2 3 4 5 6 7 --------a source of pain and boredom
8.   Do you have mixed up feelings and ideas?
very often--------1 2 3 4 5 6 7 ----------very seldom or never
9. Does it happen that you have feelings inside you would rather not feel?
very often--------1 2 3 4 5 6 7 ----------very seldom or never
10. Many people-even those with a strong character-sometimes feel like losers in certain situations. How often have you felt this way in the past?
never--------1 2 3 4 5 6 7 ----------very often

11. When something happened, have you generally found that:
you overestimated or underestimated its importance--------1 2 3 4 5 6 7 ----------   you saw things in the right proportion
12. How often do you have the feeling that there's little meaning in the things you do in your daily life?
very often--------1 2 3 4 5 6 7 ----------very seldom or never
13. How often do you have feelings that you're not sure you can keep under control?
very often--------1 2 3 4 5 6 7 ----------very seldom or never
14. Does it happen that you have the feeling that you don't know exactly what's about to happen?
very often--------1 2 3 4 5 6 7 ----------very seldom or never

Appendix 6:   18 items measuring socio-cultural brokerage

Given below is a series of questions about how people act on overseas

assignments or while in their home country with newcomers from other countries.

Please indicate to what extent each statement is true for you NOW, while on this

course and in Holland.

 Not true ……1234567………Very true

1   **I know other people with useful contacts and information**

2.   **I try to see situations from the viewpoint of people I am helping**

3.   **I am prepared to make contact with someone I have not heard from for a very long time**

4.   **I help other people with information I have gained from a variety of sources**

5.   **I'm prepared to use my contacts with others to help other people**

6.   **I expect rewards from people I've helped**

7.   **I offer practical help to people who are in a new situation**

8.   **I'm approached by others for information**

9.   **I have experienced some degree of 'culture shock' at some point in my life**

10.   **I will pass on uncertain information**

11.   **I exchange information with other people**

12.   **Helping newcomers to settle in costs me money or other resources**

13.   **I consider newcomer's experiences to be a valuable source of information**

14.   **I like being a source of information and contacts**

15.   **If someone is in a new situation I am prepared to answer repeated questions many times**

16.   **I continually update my information on the basis of what people tell me**

17.   **I put people in contact with others if I think they can help them better than myself**

18.   **I use other people's experiences as a source of information**

Appendix 7:   **12 Item scale measuring Social Interaction**

In terms of living in this country how able do you feel you are…
Not at all able -------- 1 2 3 4 5 -------- Very   able

1. In initiating interaction with a stranger?

2. In dealing effectively with the political system?

3. In accurately understanding the feelings of another person?

4. In dealing effectively with frustration?

5. In entering meaningful dialogue with other people?

6. In developing satisfying interpersonal relationships with other people?

7. In dealing effectively with stress?

8. In empathizing with another person?

9. In dealing effectively with communication misunderstandings between you and others?

10. In working effectively with other people?

11. In maintaining interpersonal relationships with other people?

12. In dealing effectively with anxiety?

Appendix 8:   9 Item scale measuring Adjustment

How adjusted are you…
(Completely Adjusted ------------1 2 3 4 5 ------------- Not adjusted at all)

1. To socializing with the local nationals

2. To the food in this location

3. To the health care in this location?

4. To the shopping in this location?

5. To interacting with the locals on a day to day basis?

6. To the living conditions in general at this location?

7. To the cost of living at this location?

8. To the housing conditions at this location?

9. To the entertainment / recreation facilities and opportunities in this location?

Appendix 9:   Items measuring International Intent

How true is each of the following statements for you?
 very true…1234567…not true at all

1. I am seriously considering pursuing an international career

2. I would like my first job after my MBA to be in a foreign country

3. If offered an equivalent position in my home country or in the foreign country of my choice, I would rather work at home.

4. While continuing to live in my home country I would like to travel more than 40% (approximately 20 weeks /year) of my time

5. I would like to have an international assignment (working abroad for more than one year) at some time in my career

6. I would like to have an international career in which I had a series of foreign assignments

7. I would like my first job after my MBA to be in my home country

8. I had never thought about taking an international assignment until i read this questionnaire

Appendix 10: Narrative Method and Story Database Entries in this research

The use of narratives in Organisation and Management and particularly relating to expatriation is comparatively new (Peltonen 1998, Glanz 2001, Osland 2000). Peltonen (1998) has considered the use of narrative building on research methods he says was first explored in the semiotic analysis of language and culture in Anthropology (Levi-Strauss1963). Peltonen's work 'focuses on meaning structures current or former expatriate employees themselves draw upon when describing the unfolding and experiences of an international career.'(1998:877). Such interpretive research does not predefine dependent and independent variables, but focuses on the full complexity of human sense making as the situation emerges. It is in this way that the difference between storytelling and narrative is defined. Boje (2000) splits the concepts of story and narrative thus: "Story is an account of incidents or events, but narrative comes after and adds, "plot" and "coherence" to the story line."

For this study it is important that the origin of narratives can be determined though reference to an individual or published source. The general concept of reliability in quantitative research is similar to the concepts of dependability or consistency in qualitative research.

Meyer suggests that in order for qualitative research to be regarded as 'trustworthy' (Guba and Lincoln 1994) it must be perceived as credible, transferable, dependable and confirmable. These concepts have parallel counterparts in classical research design; objectivity, reliability and validity. An attempt has been made to apply these concepts to the collection of material with the understanding that each of these concepts are subject to

a continuing, ongoing debate as to how far they can be applied to qualitative method. Given that narrative method allows for differential interpretation, it is extremely important that researchers using this method ensure narratives and accounts are properly charted and traceable, not least to allow examination of alternative interpretations. In relation to this field where stories are drawn from people from various cultures all the problems relating to cultural bias and interpretation and translation are acknowledged. Purposeful and non-probabilistic sampling strategies were used in collecting narratives for this study (Goetz and LeCompte, 1984) in that material or participants were deliberately selected for the insights they could provide in investigating the research problem.

Some narratives were not originally collected for academic research as they were originally first harvested and recorded for the author to use in formal and informal individual and group work sessions with other expatriates. They formed part of a series of informally collected anecdotes and stories of expatriates that appeared to help newly acculturating expatriates to understand their experiences. These original informal anecdotes and stories were mainly collected in the Netherlands through contacts made via two major expatriate networks, Unilever Expatriate Network and the 'In Touch' group in Rotterdam. Further accounts were added through contacts made during the author's professional career with expatriate careers guidance firms, but only when such accounts did not compromise the confidentiality required of such contact. To enhance this current research a story database was constructed to preserve these anecdotes and collect other pertinent examples. Many of the accounts originally collected informally were discarded for use in this study because although they appeared to illustrate sensemaking properties, no reference could be made back to the participants of the stories because of their having moved on internationally and they were no longer in touch with the author. The narratives appearing in this manuscript have all been checked with supporting data either with contemporaneous written accounts (authors notes or letters) or by the accuracy of accounts being directly checked with people directly involved in the accounts.

The 31 narratives in this study were drawn from 4 sources:

(a) Input on the web posted by expatriates about their deliberately selected own circumstances. (7 stories)

(b) The author's personal experience. (3 stories)

(c) The experiences of contacts that were checked and verified with persons directly involved. (8 stories)

(d) Stories drawn from the press and expatriation eyewitness accounts using named individuals and companies (13 stories)

In this study all materials published for academic purposes are considered as secondary sources, but all stories and anecdotes published online or in other media (e.g. newspaper articles, biography) are described as primary sources when they occur in real time and for purposes other than academic study. Published material is accredited, while material from individuals is presented in such a way as to protect the privacy of individuals and organisations involved. Nevertheless, the identity of informants and organisations has been coded for future reference. All examples are drawn from actual expatriate experience in an attempt to provide 'narratives of the actual' and to avoid the construction of 'normative and idealised knowledge' (Steyaert and Janssens, 1999:193). Because expatriation is an area where great changes in policy and understanding have occurred over the last ten years, each illustration is dated with a date of occurrence rather than collection.

Story Database Entries in this research

This database refers only to those stories collected by the author directly from expatriates and their families. Published stories that also form part of the author's story database are accredited in the references section of this study.

SD No	Date of Occurrence	Date of Collection	Informant Male/ Female	Nationality	Country	Organisa-tion	Interview/ Publication
1		2000	Male				Expatexchange (spouse).com
2	1960's	1999	Female	Hungarian	U.S.	-	Interview
3	1998	1998	Male	Japanese	Nl.	Academic	Interview
4	1995	1996	Male	British	Ireland	Multi national	Interview
5	1985	1985	Male	British	Singa-pore	Private corp.	Interview
6	1997	1999	Female	British	Aus/Nl.	Multi national	Interview
7	1996	1996	Male	British	Nl	Multi national	Interview
8	1996	1996	Female	Brazilian	Nl	Multi national	Interview
9	1995	1999	Female	British	Aus/Nl.	Multi national	Interview
10	1999	April 1999	Female	American			expatexchange.com April
11		May 2000	Female	American	Trinidad		Expatexchange (spouse)
12	1986	1986	Male	British	Singa-pore	Private corp.	Interview
13		2000	Female	Canadian	Thailand		Interview
15	2000	2000	Female	British	UK	Consulting House	Interview
16	1996-2003	2003	Male	British	UK	Multi national	Interview

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