

ASSESSING A SUCCESSFUL GLOBAL BUSINESS CULTURE: EUROPEAN
EXPATRIATES IN THE U.S. AND THE IMPACT OF THEIR CULTURAL TRAINING FOR
INTERNATIONAL ORGANIZATIONS

BY

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THESIS

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Abstract

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Globalization greatly facilitates the flow of information, capital, goods and people. One of the manifestations is the increasing number of expatriates (commonly referenced as 'expats') dispatched overseas on international assignments. To mitigate the risk of expatriate failure, international organizations have increasingly established training programs to assist expats' and their families' adjustment and integration in the host country. Are those programs really effective? What are the biggest challenges expats and their family encountered in the host country and how did they adjust? How would expats identify themselves, does their identity shift over time? To gather firsthand information, an online survey was developed and distributed among target population, namely European expatriates working in the U.S. Due to presumed cultural closeness, this group received limited attention in research literature. Both qualitative and quantitative survey data will be collected and further analyzed to assess the effectiveness of cross-cultural programs and identify impacting factors at both individual and organizational level. The results permit to assess the added value for organizations, training agencies, international assignees and their accompanying family members.

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Chapter 1

Introduction

Globalization greatly facilitates the flow of information, capital, goods and people. One of the manifestations is the increasing number of expatriates dispatched overseas on international assignments. According to a recent research report published by Finaccord, the total number of expatriates worldwide amounted to around 50.5 million in 2013 (Finaccord, 2014). Expatriate failure rate varies greatly depending on a series of variables such as, the definition of failure, the duration of the assignment, expatriate's home and host countries, industries (Harzing, 1995). Though expatriate failure rate has not reached a consensus in academia, the cost of a failed international assignment is recognized to be high. According to a PWC's report, an international assignment on average costs US\$ 311,000. Vogel et al. (2008) estimated the expense of a failed expatriate project falls in the range of \$250,000 to \$1,000,000. Thus, expatriation deserves organizations' due attention.

Literature on expatriation is immense. Expatriation between culturally distant nations such as European or American Expatriates stationed in Asia was one of the hottest topics in the domain of international business (e.g. Sanders, 2014; Rau, 2013; Schaaper, 2013). Recent years, there are a growing number of studies on European expatriates and/or European expatriation. Many scholars seek to compare and contrast how European and American expatriate managers adjust differently to a third country (e.g. Turkey, Morocco, Greece) in order to make human resource (HR) policy recommendations for multinationals (Cuplan & Cuplan, 1993; El Mansour & Wood, 2010; Myloni, Harzing and Mirza, 2007). Others took a theoretical approach trying to understand the interconnections between expatriate staffing and the performance of multinational corporations' (mainly headquartered in Europe) U.S. subsidiaries (Colakoglu & Caligiuri, 2008).

Still others (Stahl & Cerdin, 2004) conducted research on European expatriates in the U.S., but their research was designed basically from a conceptual point of view. They are usually single focused (e.g. Expatriates' repatriation concerns), based on relatively outdated data, and confined to few European countries (e.g. Stahl & Cerdin, 2004). The group of European expatriates working in the U.S. was rarely studied as a whole.

To fill the gap, this thesis focuses on this phenomenon and comprehensively study a series of expatriates' success factors analyzing his/her personal narratives presented in an online survey (IRB protocol number: 16908). The survey in question was developed and distributed among European expatriates residing in the U.S. to gain the first hand information regarding their challenges, identity, expectations and what their home organizations are currently doing to address those concerns. The ultimate goal is to identify the discrepancies between the two and help multinational corporations (MNCs) enhance the effectiveness of their cross-cultural training programs to improve the expatriation success rate. A happy expatriate means better job performance, higher productivity, greater organizational loyalty and thus an increased return on investment (ROI) for organizations (Lee & Sukoco, 2010).

The rest of the thesis is organized as follows: in the following literature review section, key conceptual elements such as globalization, expatriates, expatriate adjustment and identity, cross culture training (CTT) are explained and clarified. Next, the author will present expatriation in the European context. In the methodology section, the design of the survey, sample selection criteria and data collection procedure are described in detail. Selective findings are further discussed afterwards. Finally, the thesis will end with the conclusion section with recommendations for future researches.

Chapter 2

Literature Review

Globalization

The term “Globalization” was coined by Theodore Levitt, a former professor at Harvard Business School. In his article "the Globalization of Markets" published in 1983, Levitt states that driven by new technologies, the world is moving towards "a converging commonality." According to Levitt, technology and globalization are the two factors that "shape the world." Levitt admits that human preferences "evolve and diverge" continuously but still are subject to gradual convergence. Thus, to reap the benefits of economy of scale, well-managed global companies should "seek sensibly to force suitably standardized products and practices on the entire globe." Built on Levitt's description of globalization, other scholars attempt to offer a more comprehensive definition of globalization. (Levitt, 1983; p.102)

For instance, Held et al. (1999) claim that globalization touches every aspect of people's lives. They vividly compare globalization to a "molding" process powered by "economic and technological forces" that turns the world into "a shared economic and political arena." In this thesis, the definition by Held et al. was adopted, according to him " Globalization can refer to those spatial-temporal processes of change which underpin a transformation in the organization of human affairs by linking together and expanding human activity across regions and continents." Such a definition encompasses four elements that Held regarded as fundamental: "extensity, intensity, velocity, and impact". (Held et al., 1999).

Similarly, Stiglitz (2004) emphasizes the integrative force of globalization that contributes to the breakdown of artificial barriers and greatly facilitates the "flows of goods, services, capital, knowledge, and people across borders."

Steger (2009) in his book "Globalization: a Very Short Introduction," described an ancient Chinese fable "the blind men and the elephant" to critique the globalization scholars who tend to take a part for the whole and hold one-sided understanding towards globalization. He outlines four dimensions of globalization: economic, cultural, environmental and political. Building on Steger's definition, one additional dimension ought to be included: people. The mobility of people is also a pivotal point of globalization. The flow of people largely falls into two categories: permanent and temporary immigration. The latter includes multiple forms: guest workers, international students, and international tourists (Freeman, 2006). But Freeman overlooked a distinctive group of people: expatriate professionals, the focus group of this study. The following section of literature review will be fully dedicated to them.

History of Globalization - the appearance and proliferation of international organizations

Opinions vary on the history of globalization. Thomas L. Friedman (2005) traces globalization back to 1492 when Christopher Columbus set sail seeking to find an alternative route for India and proves the world is round. He famously divides globalization into three periods: Globalization 1.0 (1492 to 1800)- in this epoch, globalization was mainly driven by imperial countries' growing thirst for resources. Globalization 2.0 (1800 to 2000), when companies played the key role in globalization aiming at new markets and labor force; and Globalization 3.0 that starts around 2000. According to Friedman, Global 3.0 is unique, in that it was led by "a much more diverse group of individuals" and no longer dominated by the whites in the Western countries.

Others disagree. Based on two empirical studies, O'Rourke and Williamson (2000) argue that neither the grand discovery of Columbus (1492) nor the expedition led by Vasco Da Gama

(1498) generated great economic impact on the world economy. They conclude that globalization big bang started only in the 1820s. On the other extreme, A.G. Frank (1998) maintains that the origin of globalization dates back to the third millennium B.C.E. as trade links were established between Sumer and the Indus Valley Civilization. Absorbing these different voices, the author is inclined to veer back to a commonly agreed view that divide globalization into three phases: Archaic globalization, which starts from the time of earliest civilizations (as Frank supports) and ends around the 1600s. This period is characterized by the active participation of the non-Europeans (Hans, 2000). Just to think about the legendary Silk Road that connects China, India, Persia, Europe and the Arabic world. It was a network of trade and cultural exchange. The second phase, known as the "Early Modern" or "Proto-globalization," spreads approximately from 1600 to 1800 (Hopkins & Bayly). In this phase, a number of European maritime empires rose, with the Portuguese and Spanish empires being the firsts, followed by the Dutch and the British. This period also witnessed the set up of the first multinational corporations (MNCs) like the British East India Company and the Dutch East India Company. Modern globalization begins after the Industrial Revolution in the 19th century, this is consistent with O'Rourke and Williamson's argument. It was exactly in the 1820s when transport revolution occurred. With the advent of new means of transportation such as steamships and railroads, the cost of international transportation dropped significantly. More countries willingly or forcibly involved in the international trade. The two Opium Wars in the middle of 19th century ended China's closed-door policy and broke its self-sufficient economic system bringing it back to the global economy. It was inevitable but extremely painful process for China. Since then the country gradually became a semi-colonial and semi-feudal society, a century of "national humiliation" as defined in the Chinese history book. During the late nineteenth and

early twentieth century the international financial market further integrated.

Although globalization suffered setbacks during the two World Wars and, the upward trend remains unchanged. As Nayar (2006) stated, globalization led to an increased degree of openness in most countries and "international trade, investment and finance are the three important dimensions of globalization."(p.140). That called for the establishment and supervision of various international institutions such as the United Nations (UN), the International Monetary Fund (IMF), the World Bank, the General Agreement on Tariffs and Trade (GATT) and its successor World Trade Organization (WTO).

The Impacts of Globalization

Globalization as Milanovic concludes has two faces: it contains both benign and malignant characteristics, individual's perception varies greatly depending on his/her origin, social class, financial position, ideological tendencies etc. (Milanovic, 2003).

In the eyes of its proponents, globalization represents a benign force. With international trade, resources are allocated on a global scale, countries are able to make the most of their comparative advantages and be better off (Porter, 1990). China is a great example, since the adoption of reform and opening up policy in 1978, the country sustained rapid economic growth. In 2011, it became the world second largest economy surpassing Japan (Monahan, 2011). Globalization also strengthens the interconnectedness in the world. As Stiglitz noted, "globalization has reduced the sense of isolation felt in much of the developing world" and has made knowledge much more accessible (Stiglitz, 2003, p.4). According to Kant's democratic peace theory, Closer economic ties between countries could contribute to preventing conflicts and secure peace (Kant, 1795). The history of the European Union (EU) started from the foundation of the European Coal and Steel Community (ECSC) in the aftermath of the Second

World War. The purpose was to maintain peace in Europe through deep economic cooperation and integration. The signature of Single European Act (SEA) in 1986 marked a turning point in the construction of the European Union as it laid out the foundation for the creation of a single market. In the Treaty on the Functioning of the European Union, single market is defined as "an area without internal frontiers in which the free movement of goods, persons, services and capital is ensured in accordance with the provisions of this Treaty." The European common market was fully institutionalized with the 1992 Treaty of Maastricht establishing the European Union. Since then the EU and its institutions have worked on defending the European interests and the four freedoms across the 28 member states.

Conversely, critics blame the West for adopting double standards in globalization: on one hand they exert influence on developing countries pushing the latter to lower or eliminate trade barriers; but on the other hand, they themselves maintain a high trade barrier- non-tariff barriers in particular. The EU's Common Agriculture Policy (CAP) for instance has long been criticized for being protectionist in nature. CAP has an annual budget of about €9 billion (CAP overview by European Commission) while its support measures are beneficial to the sustainability, food security and self-sufficiency for its member states, they inevitably erode the competitiveness of food production from third countries outside the EU. Apart from being hypocritical, the West also exploits its advantageous position to serve their own interest, letting developing countries shoulder unfair share of costs (Stiglitz, 2003). The former president of France Jacques Chirac echoed this view, worrying that "globalization is not making life better for those most in need of its promised benefits."(Stiglitz, 2002, p.4)

Similarly, Nanyar suggests that despite a recorded convergence in commodity prices during the late 19th century, development in the world was uneven. Same trend was documented for the late

20th century (from early 1970s to the late 1990s): income inequality gap "between and within the countries" widened, and the unemployment rate in different parts of the world increased at different levels (Nayyar, 2006). In the same vein, Milanovic (2003) takes a historical perspective. He states at the turn of 19th century, economically China and India were close to the level of development in Western Europe. He attributes the two countries' decline to globalization. In addition, he claims globalization is responsible for the decline of the Third World that was deprived of the opportunity to develop and industrialize due to colonialism. In the same paper, Milanovic compares the GDP per capita growth rate in 1960-78 and 1978-98 and tracks the Gini coefficient in the same time frame. He observes that though globalization continued to expand, it became less successful in bridging the income inequality between rich and poor countries.

The deregulation and integration of the global financial markets, financial crisis are becoming more contagious. Regardless of where the initial outbreak was, it may spread rapidly and spark global concern.

Expatriates

As globalization increases, organizations are eager to expand their business presence at a global level to better compete with its competitors and serve its customers. But "Companies don't go global, people do"(Molinsky, 2015), a growing number of expatriates are sent abroad.

According to a recent research report published by Finaccord, the total number of expatriates worldwide amounted to around 50.5 million in 2013 (Finaccord, 2014).

Ulf Hannerz in his theoretical essay "Cosmopolitans and Locals in World Culture" defines expatriates as "people who have chosen to live abroad for some period and who know when they are there that they go home when it suits them" (1990, p.243). While others stress that

contemporary expatriates are "mostly organization men", they are "employees of business organizations, who are sent to another country on a temporary basis to complete a time-based task or accomplish an organizational goal" (Harrison et al., 2004, p.203). In this thesis, the term "expatriate" refers to organizational expatriate professionals and their accompanying family members. Following this definition, non-organizational form of expatriation like "self-initiated" expatriates are excluded from the research.

As Fechter and Walsh (2010) noted that though in a broad sense, expatriates are fundamentally a group of migrants. The term "expatriate" is commonly "reserved for Western migrants"(p.1199)- European or North American nationals deployed abroad mostly for work-related reasons. Thus, they opted for the terms like " mobile professionals" or " privileged professionals" to distinguish them from "migrants" who are many times labeled as "low skilled and economically disadvantaged". (Fechter & Walsh, 2010, p. 1197) Adam and Van de Vijver argue that expatriates are a group of " powerful minority": they are in general well-educated and high-income professionals. (Oltra., Bonache, & Brewster, 2013) and they also have "access to social, economic and public services" that may not be available to locals.

Oftentimes expatriates are expected to undertake multiple missions, expatriates in MNCs are dispatched to address immediate business needs: for instance, overseas market turnaround, foreign direct investment coordination, post-merger integration. Others set off on long-term goals: to generate and transfer knowledge and/or to grow his/her leadership skills and become a real global leader (Black & Gregerson, 1999; Kohonen, 2005). Moreover, MNCs prefer to send parent country national expatriates (PCNs) overseas to exert cultural control over the subsidiaries. This could be achieved either by appointing expatriates in key positions to directly control subsidiaries' operations or indirectly through socialization (Balgia & Jeager, 1984;

Harzing, 2001). Cultural control is deemed to be more important when the parent country and host country are culturally distant. Academics prove that as cultural distance increases, MNCs are more inclined to dispatch more expatriates to fulfill this need (Harzing, 1996; Gong, 2003).

Expatriates in public sectors are generally dispatched for different purposes, military and diplomatic services or inter-governmental exchange programs for instance. (Stening, 1994)

Expatriation Failure and Cost

Sending an expatriate abroad is costly for organizations. A decent expatriation package includes various forms of allowance in terms of housing, children's education, taxation, healthcare, relocation, and annual paid trip home. In some cases, expatriates would be equipped with additional staff such as personal assistant/ interpreter and drivers. Those accepted to work in developing countries often times are entitled to "foreign service premium"/ "hardship allowance" (Budden, 2014) - a temporary salary hike to compensate the inconvenience in expatriates' daily lives. Expatriation is a challenging task as it may end up failing despite organizational support. Premature return is undoubtedly a sign of failure, it refers to the situation when expatriates return to home country before the completion of the assignment due to maladjustment. Scholars (Black & Gregersen, 1999; Harzing, 1995) indicated other less visible forms such as underperformance in the host organization, when expatriates stayed for the predetermined period of time but performed below par; and repatriation turnover, when expatriates decide to leave the home organization upon repatriation.

Indirect and/or intangible costs are also involved in case of expatriate failure. At organizational level, it may have negative impact on management performance, productivity, customer relations, operational efficiency, and employee retention rate. Feldman and Thompson (1993) state repatriates' "maladjustment" and "dissatisfaction" can be contagious, meaning disincentive

other employees to take on future international assignments. At a personal level, the cost of expatriation failure goes beyond monetary expenses. It could deter expatriate's career progress, hurt his/her self-esteem and confidence, affect mental health, cause identity confusion, and in the long run tarnish his/her professional reputation (Mendenhall & Oddou, 1985).

Cases of expatriates' failure can be explained for a variety of reasons. The incapability to adjust to the new environment is regarded as the major reason for expatriation failure (Black et al., 1991). Family concerns are proved to be a key factor of expatriate's success and in many cases have huge influence on expatriates' acceptance of international postings in the first place. Such arguments were confirmed by a survey conducted by Windham International and the National Foreign Trade Council in 1999.

Scholars and business practitioners came up with different approaches to improve the effectiveness of expatriation. Some emphasize on improving the selection criteria and procedure. They insist that organizations should select expatriates wisely and candidates should be fully assessed taking into account their technical capabilities, personal traits (e.g. emotional stability, agreeableness, extraversion, openness) and cross cultural competencies such as cultural flexibility, people orientation and non-ethnocentrism (Black et al., 1992; Shaffer et al. 2006; Tung, 1987). Additionally, factors such as language skills (both verbal and non-verbal) and motivational state (e.g. belief in the mission, consistency with the career goal, genuine interest of the host culture etc.) also deserve attention (Ronan, 1989; Chew, 2004). Others contend that organizations should respond to this challenge with strategic planning. Corporate HRs should purposefully hire "internationally oriented" MBAs to build the pipeline for future international assignees. Many others recommend offering training programs such as language training and

cross-culture training (CCT) to expatriates and their accompanying family members (partners and children) (Mendenhall and Oddou, 1985).

Cross cultural training (CCT)

For decades, cross-cultural training has been offered to help expatriates survive and thrive in new cultural environments. CCT could be offered before and/or during expatriation, and be referred to as pre-departure or post-arrival cross-culture training. According to the survey cosponsored by GMAC Global Relocations Services, National Foreign Trade Council (NFTC) and SHRM Global Forum (2004), 60 percent of the companies surveyed provide formal pre-departure cross-cultural training (Global Relocation Trends 2003/2004 Survey Report).

Though widely adopted, the impact of CCT has been under debate. Black and Mendenhall (1990) are strong believers of CCT, claiming it is "effective in developing important cross-cultural skills, in facilitating cross-cultural adjustment and in enhancing job performance." Their argument is supported by a series of empirical researches (Deshpande & Viswesvaran, 1992; Morris & Robie, 2001) wherein the positive correlations between CCT and expatriates' adjustment as well as performance are confirmed. In the same survey conducted in 2004, 73 percent of respondents rated formal CCT programs to be highly valuable.⁸ Others question that cross culture competences are inborn capabilities that cannot be taught. Some researches indicate CCT has little impact or even has negative correlation with expatriates' adjustment (Hechanova, Beehr & Christiansen, 2003).

CCT can be efficient as long as it's well structured. As per Ferraro and Briody (2012), a solid CCT program should cover the following topics: general cultural introduction, verbal and nonverbal communication patterns, cultural self-awareness: studying the cultural values of both

the home and the host countries to be able to evaluate the cultural influence, cultural specific information (e.g. organizational culture), and cross-cultural skills.

The way CCT program is delivered plays an important role. As the 2014 report suggests, the majority of participants embraces higher degree of interaction and engagement. Training methods like role-play, field trip, and class discussion are well received. While passive teaching approaches like assigned readings, traditional lectures, CD-ROM programs tend to be less welcomed by trainees (Magnini & Honeycutt, 2003).

Cosmopolitanism and Expatriate Identity

Expatriates are commonly associated with cosmopolitanism (Hannerz, 1990). The word derives from its Greek word "kosmopolitês." It is consisted of two parts: "cosmo" means " world " or " universe," while "politês" could be translated to "citizens." Literally, it refers to " citizens of the world."(Stanford Encyclopedia of Philosophy). In this sense, Diogenes of Sinope (404-423 BC), the founder of the philosophy of cynicism, could be considered as a cosmopolitan. When asked what country he was from, the philosopher replied, "I am a citizen of the world" (Diogenes Laertius The Lives and Opinions of the Ancient Philosophers 3rd Century AD).

The connotation of "cosmopolitanism" evolved over time. For Marx and Engels, cosmopolitanism is "an ideological reflection of capitalism" and the idea of cosmopolitan is closely linked to the capitalist globalization. The bourgeois advocate for free trade, individual freedom and mutual benefits for their own class at the expense of suffering of millions, the proletariat in particular. Marx and Engels also reveal that proletariat across counties share common features and interests. In their magnum opus, the Communist Manifesto, they call for the unification of all proletariats. Their ideal of a class-less society, a gradually diluting concept of state post revolution, is another explanation of "cosmopolitanism."

According to Hannerz (1990), who offers a mainstream definition of cosmopolitanism, the concept is double layered. On the one side, it is an orientation, a curiosity and open-mindedness towards the plurality of cultures, "a willingness to engage with the Other" (p.239). On the other, cosmopolitanism can also be a set of competencies including personal ability, mental readiness and cross-cultural skills that can help individuals navigate and immerse into alien cultures.

Hannerz also captures the paradoxical nature of cosmopolitanism, framing it as the "interplay between mastery and surrender." He noticed that in some cases, cosmopolitans only selectively absorb certain elements of other cultures that suit them. In other cases, cosmopolitans choose to surrender and adopt other culture(s) wholesale. The author further points out that such surrender is conditional, as cosmopolitans know perfectly where to draw the line and how to exit.

Wendt (1994) suggested two distinct types of identities: Corporate identity and social identities.

The former is " an intrinsic and self-organizing identity that constitutes actor individuality."(p.385) He considers corporate interests to be the source of motivational energy to ever engage in any action even "prior to interaction". Social identities on the other hand refer to " sets of meanings that an actor attributes to itself while taking the perspective of others. " Thus, it has both " individual and social structural properties". (p.385) An actor generally assumes multiple identities though the salient one may vary. Social identities "enable an actor to determine 'who I am/we are' in a situation and positions in a social role structure of shared understandings and expectations." (Wendt, 1994, p.385)

Identity is not static, especially in this modern liquid world characterized by constant change, people's identities are "in the state of continuous flux" (Bauman, 2004). Adams & Van de Vijver (2015) contend that identity is crucial to expatriates' well-being and career success. Expatriates' success depends on how he/she manages both the home and host cultures (acculturation) and

how he/she defines him/herself in continuous negotiations with the new cultural context (Adams & Van de Vijver, 2015). They uncover two forms of expatriate identity: first, Cosmopolitan identity implying that expatriate assumes navigating in multicultural environment. Second, pragmatic identity, which involves minimal adjustments while maintaining expatriate's core identity. Thus, not all expatriates assume a cosmopolitan identity.

Identity is a dynamic concept. Keeping track of expatriates' identity shift, the choice between cosmopolitan and pragmatic identity could help organizations and researchers better understand their adjustment process.

Adjustment and Acculturation

To individuals, acculturation can refer to the process of psychological adjustment when one has direct, long-term and continuous contact with culturally dissimilar groups. It can also refer to the results of such process, the induced changes in those cross-cultural encounters (Sam & Berry, 2006; Gibson, 2001). Acculturation has two essential components: first, cultural maintenance, and second, cross-cultural engagement (Arends-Tóth & Van de Vijver, 2007). Adjustment and acculturation are often used interchangeably. In fact, these are two closely related but distinctive concepts. Adjustment could be viewed as the outcome of acculturation, it can be both physiological and sociocultural (Hippler et al., 2014). For instance, Haslberger et al. (2013) look at adjustment from a person-environment perspective. They focus on three dimensions of expatriate adjustment: cognitive, affective and behavioral, they then argue that training should differentiate and correspondingly address knowledge, attitudes and skills. "Knowledge and skills map directly onto our cognitive and behavioral dimensions. Attitudes moderate the effect of antecedents on affective states." (Haslberger, et al. 2013, p.345).

Grinstein & Wathieu (2012) believe expatriates' adjustment is different from that of the immigrants, since the former have preset duration of sojourn. They further examine how the two variables, "the expected duration of sojourn" and "the degree of cosmopolitanism" affect expatriates' adjustment choices (p. 337). Their statistical analysis indicates that cosmopolitan expatriates with short period of sojourn are more inclined to absorb local consumption patterns. Conversely, cosmopolitan expatriates on longer-term tenure in general opt for less adjustment to local practices compared to the non-cosmopolitans.

Molinsky (2015) developed a viable approach on cultural adjustment: first of all, one needs to understand the culture norms of the host country encompassing six dimensions: "directness, enthusiasm, formality, assertiveness, self-promotion and self-disclosure." (p. 83). Next, within the six dimensions, one needs to understand what behaviors are considered to be appropriate, the "zone of appropriateness" as Molinsky framed it. Furthermore, one should be introspective and figure out his/her comfort zone in each of the dimension to be able to decide what adaptations to make. Continuous practice is indispensable to build the muscle memories. This is consistent with Haslberger's personal-environment theory (Haslberger et al., 2013). Adjustment is not just about understanding the environment; it is also about getting to know oneself. Fundamentally, cultural adjustment is largely an individual matter.

To better understand the relationships between expatriates and cosmopolitanism, Thompson and Tambyah (1999) conducted in-depth interviews on 14 expatriates posted in Singapore.

Cosmopolitanism as an intangible ideological system is difficult to assess, so he conducted in-depth interviews and studied expatriate professionals' pursuit of cosmopolitan identity by analyzing its external expressions such as the interviewees' consumption stories, their life style and leisure activities. The expatriates do exhibit cosmopolitan traits of "nomadic mobility" and

“cultural adaptability,” however, their narratives also indicate they have strong attachment to home, to goods and places they are familiar with. The authors then argue these contradictions are the “paradoxical effacement of conventional boundaries between work and leisure and between touristic practices and everyday consumer experiences.”(Thompson & Tambyah, 1999, p.214) Wijnen et al. (2012) adopted a similar approach. Based on the online survey data collected from expatriates originally from various developed countries including the United Kingdom, Japan and the U.S. then residing in the Amstelveen/ Amsterdam region of the Netherlands. The researchers reveal the group shares some commonalities in their “value orientation, shopping behavior and perception of the shopping environment” which could be ascribed to “cognitive proximity.” However, due to cultural differences, a certain degree of heterogeneity coexists. Gaviria & Emontspool (2015) focus their studies on expatriate amateur theater in Brussels to understand the cultural dynamics in this global city. They also acknowledged expatriates' continuous negotiation between cultural flexibility and the cultural diversity, and suggested that managers targeting this consumer group need to keep a healthy balance between “hybridization and pluralization”; simultaneously address their homogeneity and their cosmopolitan aspirations. Kohonen (2008) holds that given the fluidity of expatriate's identity, the narrative approach is ideal to simultaneously capture its complexity and subjectivity. The author completely agrees with his view. That's partially I chose to conduct the online survey, aiming to decode their identity through the observations of their daily lives.

Measuring cultural differences

As E.B. Tylor (2015) defines, culture is a “complex whole which includes knowledge, belief, art, morals, law, custom and any other capabilities and habits acquired by man as a member of society.” It is a relatively abstract and broad concept that is hard to measure and

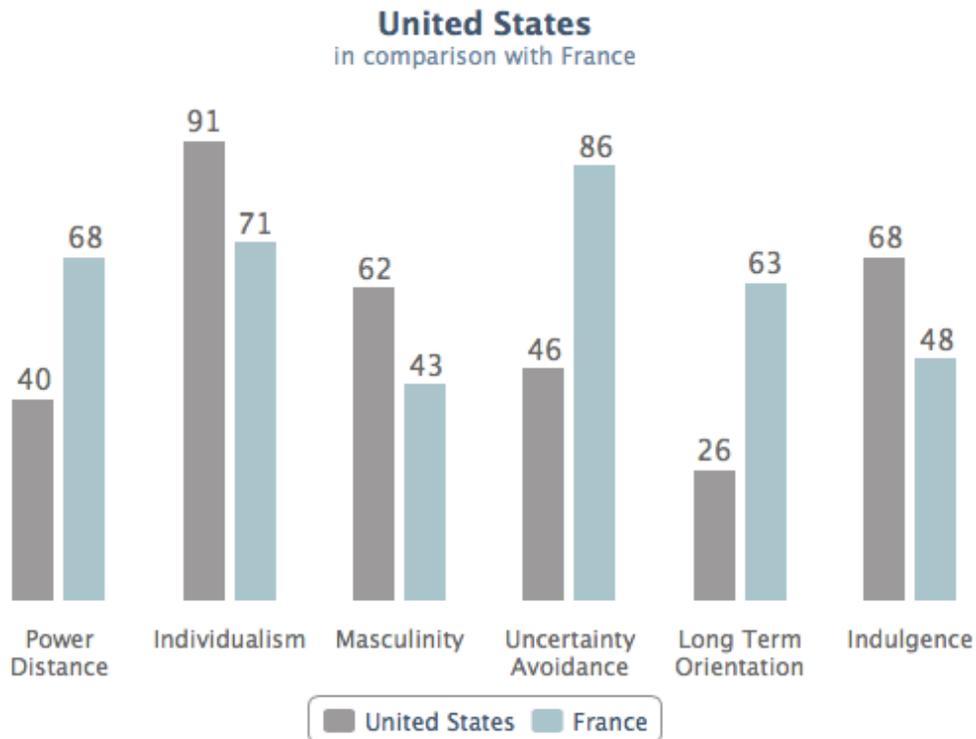
compare. To tackle this issue, scholars developed multi-dimensional frameworks. Here, I would like to briefly introduce three widely adopted approaches.

Inglehart–Welzel Cultural Map Inglehart–Welzel Cultural Map was developed by political scientists Ronald Inglehart and Christian Welzel on the basis of extensive world value analysis (World Value Survey). It measures global cultures on two major dimensions: traditional values versus secular-rational values, and survival values versus self-expression values. The two researchers state that " These two dimensions explain more than 70 percent of the cross-national variance in a factor analysis of ten indicators and each of these dimensions is strongly correlated with scores of other important orientations."(Inglehart & Welzel, 2013)

In their views, traditional values attach great importance to family values, religion, and respect for authority. People who hold these values usually are against divorce, abortion, suicide and euthanasia. On the contrary, in societies where secular-rational values prevail, members tend to be more tolerant towards these behaviors. As the name suggests, believers in survival values tend to have an ethnocentric perspective. Due to lack of security, they generally are less tolerant and more difficult to develop trust. Self-expression values, on the other hand, emphasize environmental protection, gender equality, open-mindedness towards diverse groups and a higher degree of democracy in society.

Based on these two dimensions, countries are plotted into nine clusters: Protestant Europe, Confucian, Baltic, Orthodox, Catholic Europe, South Asia, English Speaking, Latin America, and African- Islamic. Since World Value Survey was conducted regularly from 1981, the map was updated accordingly, making it a viable tool to track global cultural shifts over time. As shown here, Figure 1 is the latest version updated in 2015, it clearly shows the diversity in Europe: European countries spread across five clusters.

Figure 2. Hofstede's National Cultural Dimensions - U.S in Comparison with France.



Source: Culture Compass by Geert Hofstede, retrieved from <https://geert-hofstede.com/usa.html>

Note: Scores range from 0 to 100, 50 is generally considered to be the dividing point.

Power Distance

According to Hofstede's National Culture Theory, individuals in a high power distance country generally obey authority; inequalities among people in different ranks of society are acceptable. Employees highly respect their supervisors and expect guidance from the latter to perform the job. In comparison, in a low power distance country, amid the existing hierarchy, higher-level individuals in the society are still expected to distribute power democratically. Information is shared frequently between employees and the management. As Hofstede indicates many times the communication is "informal, direct and participative".

Individualism vs. Collectivism

Hofstede claims that in a collectivist society, people on average are very group-oriented, members can expect in-group support when faced with difficulties. Personal relationships or "Guanxi" is of great importance. In individualistic society, people are more self-centered/ I-oriented and less dependent on other group members. In the business world, employees are generally evaluated upon its own capabilities and performance.

Uncertainty Avoidance

This dimension describes general public's acceptance of ambiguity or uncertainties in life and their attitudes towards the future. In strong uncertainty avoidance cultures, people rely heavily on laws, religious beliefs, and prefer playing by rules in order to avoid unstructured situations to the most extent. In low uncertainty avoidance cultures, people on average are more tolerant towards changes and are less risk averse.

Masculinity vs. Femininity

In this context, masculinity and femininity should not be translated literally into masculine or feminine societies. It is more about a preference or an orientation. In Masculinity driven society, stereotypical masculine traits like " success" and " competition" are highly valued. People strive to be the best -"the winner". On the other hand, in a femininity society, members are more concerned about the quality of life, collaboration, personal relationships and caring for the weak.

Long Term Orientation vs. Short Term Normative Orientation

Under this dimension, societies are labeled differently depending on how it handles the relationship between the past, the present and the future. Societies with high scores prefer a more pragmatic approach, members in societies with low scores generally are rather wedded to traditions and established norms, and are more open and positive to social changes.

Indulgence versus Restraint

The sixth dimension was incorporated in 2010 drew on Minkov's research and the World Values Survey (Hofstede, Hofstede & Minkov, 2010). In indulgent societies, people enjoy a relative higher degree of freedom of gratification related to life enjoyment and fun. This is in contrast with restraint societies where personal gratification is regulated sometimes even suppressed by strict social norms.

Hofstede's cultural dimensions theory is recognized as an influential model for cross-cultural communications and has been widely applied to international management. But it is also criticized for a number of reasons: 1) Methodology: using primarily survey responses to assess cultural disparity- a variable that is culturally sensitive and subjective, might lead to inaccuracy (Schwartz 1999). 2) Timeliness: the scores were updated in 2010, in the fast changing world they are to some degree out of date. 3) Sample bias: Hofstede relies heavily on the IBM dataset collected between 1967 and 1973, such as one company approach is questionable (Jones, 2007). In addition, Hofstede's analysis is highly dependent on survey participants' responses might not be a reliable interpretation of a nation as a whole. 4) Number of dimensions: Though Hofstede added two dimensions to his original framework, for many scholars the six-dimension model remains inadequate in evaluating cultural differences.

Eight-Scale Framework by Erin Meyer

Erin Meyer, being an expatriate herself with years' of working experience in cross-cultural training, claims that nowadays, successful business leaders need to understand individual differences and at the same time be aware of their cultural differences. (Meyer, 2014) The most challenging part is to be able to detect what interactions or behaviors are simply a sign of personality differences and what materialize a deeper level of cultural differences. On the basis

of practical experience, Meyer developed an eight-scale framework to map the world cultures. The eight scales are: "Communicating: low-context vs. high-context, Evaluating: direct negative feedback vs. indirect negative feedback, Persuading: principles-first vs. applications- first; Leading: egalitarian vs. hierarchical, Deciding: consensual vs. top-down; Trusting: task-based vs. relationship-based, Disagreeing: confrontational vs. avoids confrontational, Scheduling: linear-time vs. flexible-time."(Meyer, 2014, p.16).

Meyer's eight-scale framework is comprehensive, practical and easily understood, a valuable reference for international organizations. Many of the survey questions with regard to training and organizational culture are inspired by Meyer's work.

As demonstrated by the aforementioned approaches, American and European cultures though falling under the big umbrella of western culture or western civilization, have different social norms, languages, traditional customs, etc. Such differences widely exist even within Europe or the European Union. European expatriates working in the U.S. are not exempt from identity and cultural adjustment issues.

Chapter 3

Expatriation in the European Context

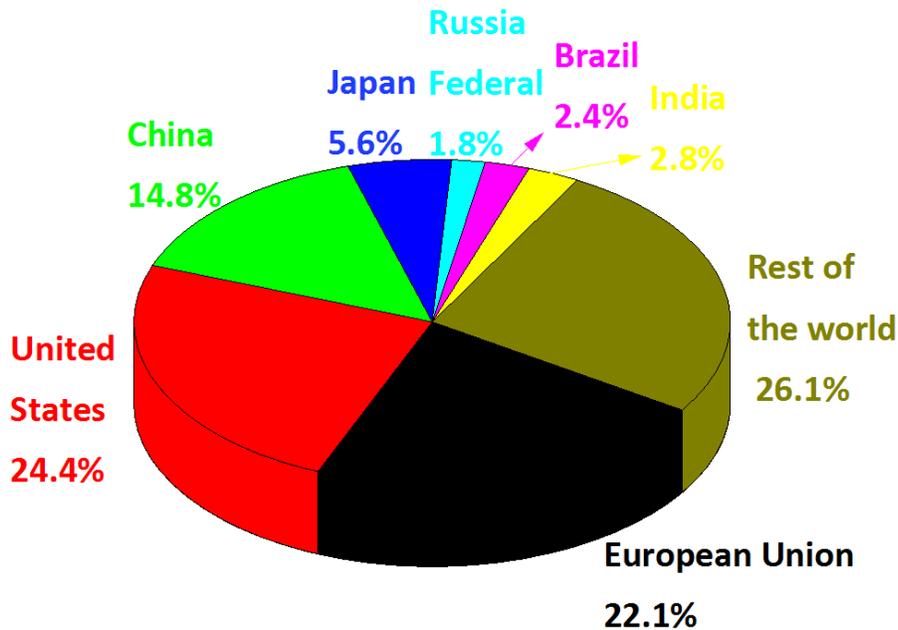
Europe and the European Union

Europe is a unique continent. It consists of fifty-one sovereign states with a population of approximately 743 million (2015) according to the report by United Nations Department of Economic and Social Affairs. Geographically, five countries are transcontinental, stretching across Eurasia. Russia is the largest country covering about 37 percent of the total continent area, while the State of Vatican City is the smallest one that covers only 100 acres.

European countries play an important role in global economy. In terms of national GDP (International Monetary Fund, 2015), Germany ranked the first in Europe followed by the U.K and France. With a GDP of \$3.3 trillion US dollars, Germany is the fourth largest economy in the world after the United States, China and Japan. (International Monetary Fund, 2015)

"The European Union (EU) is a unique economic and political union between 28 European countries that together cover much of the continent"(Europa). On May 9th, 1950, European Coal and Steel Community (ECSC) was created at the initiative of Belgium, the Federal Republic of Germany, France, Italy, Luxembourg and the Netherlands. In 1957, the Treaty of Rome gave birth to the European Economy Community (EEC) or the common market. When the Maastricht Treaty came to force in 1993, EEC officially changed its name to the EU. The EU widens and deepens over time and has grown into a political and economical union with twenty-eight member states. Economically, the EU is the second largest economy in the world. In 2015, its total GDP reached to approximately \$16.2 trillion (Eurostat, 2015) accounting for around 22% of the world GDP (The World Bank, 2015). Figure 3 demonstrates the share of the global GDP in 2015 among major economies.

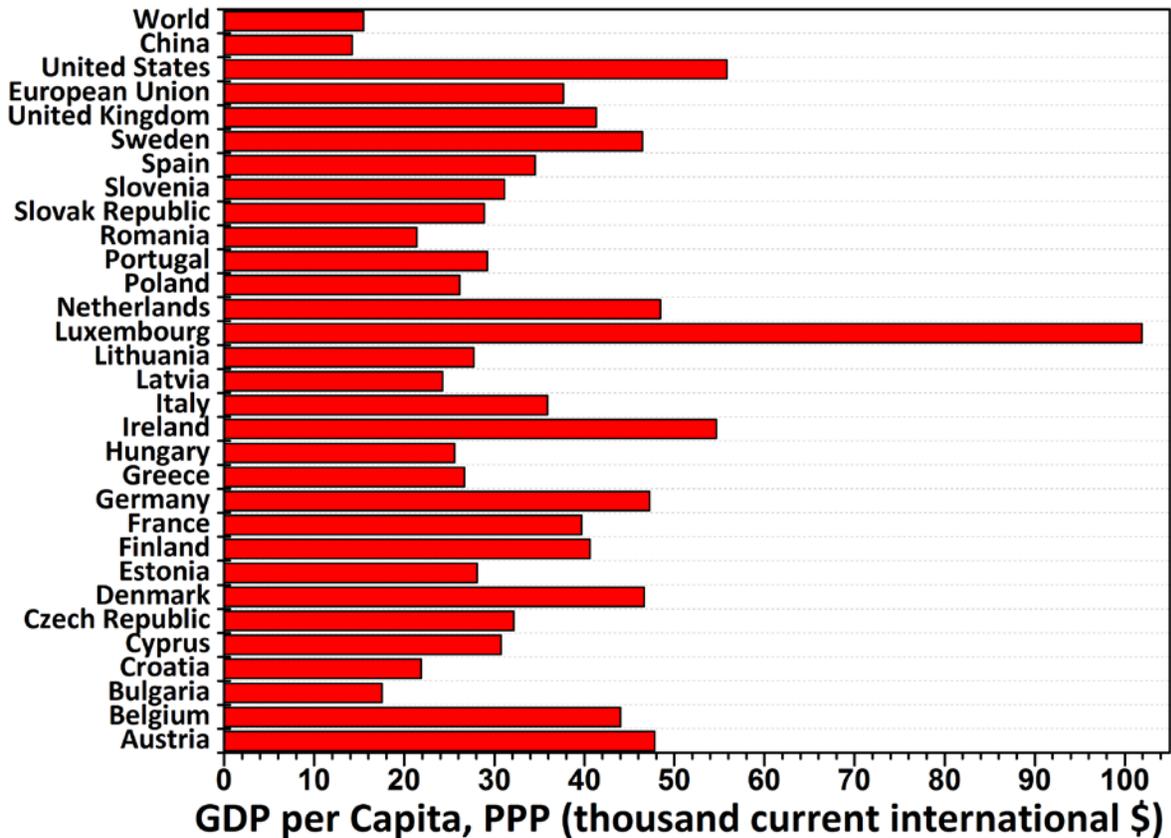
Figure 3. Share of World GDP 2015



Source: World Bank national accounts data and OECD National Accounts data files

GDP per capita measured at purchasing power parity (GDP per capita, PPP) is an important factor in measuring and comparing living conditions in different countries. Statistical methods are adopted to factor in the actual costs of living. Based on the data retrieved from the World Bank database, the average GDP per capital PPP in the EU is 37,676 international US dollars in 2015, more than doubled that of the world average. Despite the regional disparity between the core and the periphery countries, The EU residents in general enjoy above-average living conditions. In Figure 4, the GDP per capita PPP of selective EU member states, major economies like China and the U.S. as well as the world average are clearly shown. Moreover, the EU is the biggest trade bloc and “the biggest exporter of manufactured goods and services” in the world (Europa).

Figure 4. GDP per capita, PPP (current international \$) in 2015



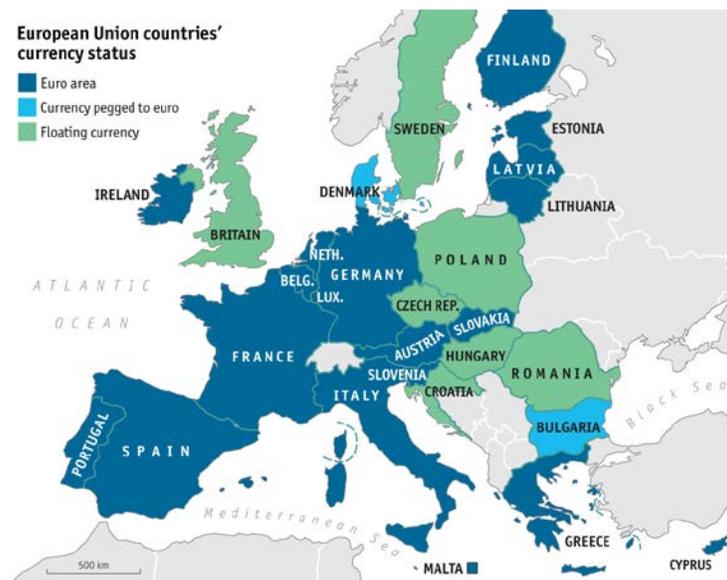
Source: World Bank, International Comparison Program database

The euro (sign: € code: EUR) is the common currency shared by nineteen out of twenty-eight EU members. It was launched virtually in 1999, Euro cash was introduced in 2002. Euro is used by 338.6 million people on daily basis and another 175 million use currencies that are pegged to euro. The euro eliminates the risk of exchange rate and associated costs within the Eurozone. Also, the euro is considered as the second most important international currency in the world. European Center Bank (ECB) is the institution of the EU in charge of monetary policies. It also has the authority to set key interest rates for Euro countries (Folkerts-Landau & Garber, 1992).

However, many blame the single currency as a contributing factor of the Eurozone crisis erupted in 2009. Being in a currency union but not a fiscal union has limited the Eurozone countries ability to respond, the mechanism of currency devaluation for instance is no longer available. Good

news is after eight years of detour the European economy seems to be back on track (Goodman, 2016). According to the latest data released by the EU, the GDP of Eurozone countries grew by 0.6 percent and by 0.5% in EU-28 in the first quarter of 2016, bouncing back to its historic peak prior to the crisis. The unemployment rate declined to 10.2% but still remains at a high level. The British exit from the EU (Brexit) added uncertainty to the Europe economy. As the former director general of Italian Treasury Lorenzo Cogo commented, “Brexit could lead to a full-blown banking crisis in Italy.”

Figure 5. European Union Countries’ Currency Status



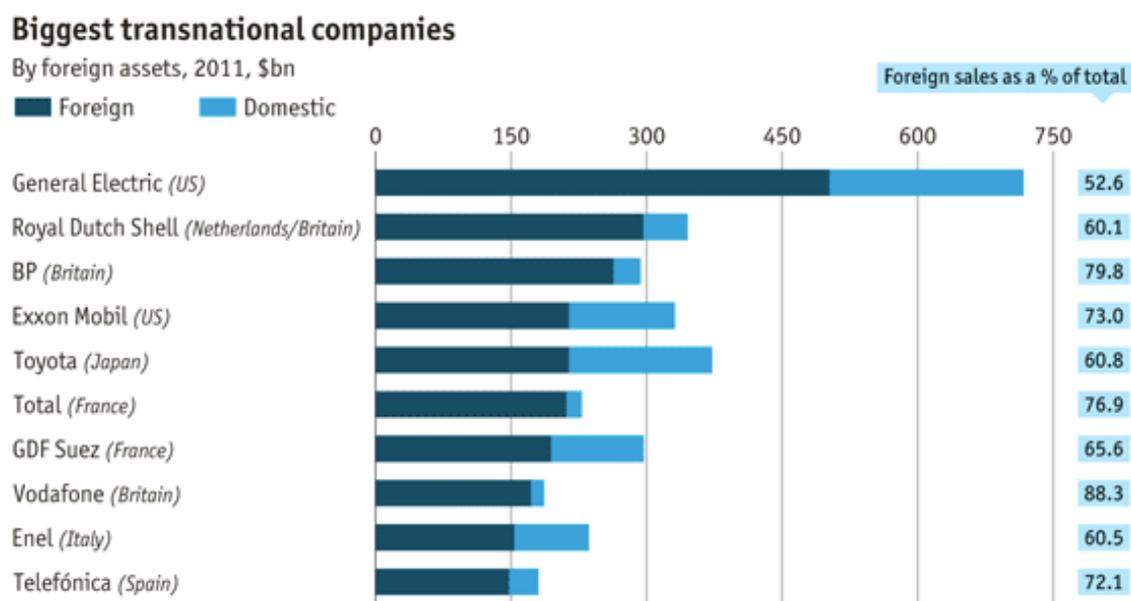
Source: Taking Europe’s pulse: European economic guide, *The economist*, Feb. 18th, 2016.

Characteristics of European-based Multinational Corporations (MNCs)

A large number of MNCs are based in Europe. In 2015, 142 European-based MNCs are listed in the Global Fortune 500: the world largest companies by revenues (Fortune Magazine, 2015). European MNCs deserve special attention. Many of them have longer experience in expatriate management, and are deemed to be more successful than their American counterparts (Tung, 1984; Brewster, 1991; Harzing, 1999). Driven by the historical tendency of capitalist

accumulation, European MNCs (e.g. British East India Company, the Dutch East India Company) were the first to go abroad (Yip, 1997). European MNCs were to some degree pushed to internationalize since their domestic markets are relatively small. Thus, it is not surprising to find out for many European corporations, international markets actually generate the lion's share of the revenue. According to a report released by United Nations Conference on Trade and Development (UNCTAD), among the top ten transnational companies by foreign assets, seven are headquartered in Europe (UNCTAD, 2011), as illustrated by Figure 6 (below).

Figure 6. Top 10 Transnational Companies by Foreign Assets in 2010



Source: Biggest transnational companies (*The Economist*, July 10th, 2012) and UNCTAD

Expatriation in Europe- current situation and trends

Europe is heterogeneous; it is unique in various ways. Scullion and Brewster (2002) spotted eight factors, which can be synthesized as follows. First of all, with the development of the EU, many multinationals take the route to regionalize/ Europeanize to capture the benefits of the single market resulting in a growing number of intra-European expatriates. “About two thirds of

EU countries total trade are done with other EU states” (Retrieved from Facts and Figures of European Union website).

Further, in the European context, two trends are well documented that warrant scholars' attention: first, an increasing number of small and medium-sized enterprises (SMEs) are expanding internationally. According to the data from EU website (Entrepreneurship and SMEs section), “SMEs represent 99 percent of all businesses in the EU.” They offer 67% of the jobs and are credited for creating 85% of the new positions. SMEs are defined mainly on two factors: staff headcount and turnover or Balance sheet total. The criteria are reported in the table below:

Table 1: Criteria for Small and Medium-sized Enterprises Defined by the EU

Company category	Staff headcount	Turnover	or	Balance sheet total
Medium-sized	< 250	≤ € 50 m		≤ € 43 m
Small	< 50	≤ € 10 m		≤ € 10 m

Source: EU recommendation 2003/361

SMEs could apply for EU-business support programs that offer research fund, competitiveness and innovation funding. They may be eligible for similar national support programs without be accused of receiving unfair ‘state aid.’ On top of that, SMEs could enjoy “fewer requirements or reduced fees for EU administrative compliance” (Europa, 2015).

Second, beginning from the 1980s, with the creation of European single market, cross border merger and acquisition are more frequently chosen as the market entry mode. Next, Europe is a relatively small geographic region with approximately 50 countries. Given the geographical proximity, many times alternative approaches like frequent flying are chosen over intra-European expatriation (Forster, 2000). Moreover, with EU’s enlargement, especially the

accession of central and Eastern European countries in 2004 and 2007, transitional economies like Poland become a popular intra-European investment and expatriate destination undergoing dramatic political, social, and economic transformation.

In addition to MNCs, Europe is home to many international organizations of diverse types: non-governmental organizations (NGOs), governments, MNCs, educational institutions, and so forth. It is an ideal place to study different types of expatriate-sending organizations. Finally, despite its heterogeneity, compared to the U.S., European countries do share some common traits or values like collectivism (Brewster, 1995). Parker (1998) attributes this convergence to the emerging sense of European citizenship.

The aforementioned characteristics clearly demonstrated the research significance of expatriation in the European context. Given the converging trends, the researchers took a fresh angle studying European expatriates as a whole.

Chapter 4

Methodologies

In order to study how expatriates and their accompanying family members adjust to the host culture, this research aims to identify potential connections between expatriates personal traits, motivations, cross culture training experience, identity, adjustment and their perception towards the international assignments. A survey was developed to capture relevant information. It consists of 86 questions grouped in seven thematic sections. The survey begins with basic demographic questions and ends with more self-reflective questions on identity.

It was designed using Qualtrics Survey software. Qualtrics has user-friendly interface, compatible with mobile applications, and has built-in data analytical functionalities. It is capable of performing basic statistical analysis and generating reports or charts. The bulk part of the questions is multiple-choice (generally including a choice named "Others" with a text entry box.) Other forms of questions like rank order, matrix table, short answer questions were also adopted. Adding such a variety would rend the survey more interesting and engaging. The survey includes both qualitative and quantitative questions, and in this regard could be viewed as a mixed research method.

Compared to paper-based survey, online survey generally incurs lower costs and it is more time efficient and convenient. Considering the target populations are busy and tech-savvy professionals, researchers chose to conduct the survey online overlooking the comparatively lower response especially when there are no monetary rewards involved.

Design of the survey

The survey touches upon major influencing factors of expatriate success. It is organized by topics from basic demographics, language capabilities, training, stereotype, food, organization, and working environment. The narrative faithfully reproduces expatriate's daily

life. Taking both cross-sectional and short-term longitudinal data analysis, the researcher would be able to grasp a better understanding on the impact of Cross Cultural Training (CCT) for target populations, namely European expatriates in the U.S., and generate viable recommendations to further enhance its effectiveness. In the following chapter, the author explains in detail the purpose and the logic of the survey by topic.

General Information (Q2~Q44)

In this section (from questions 2 to 44), first of all, Expatriates' basic demographic information will be collected to build their profile. Some scholars believe this type of information has deeper implications. Expatriate's nationality for instance, is a determinant of the cultural distance between his/her country of origin and the host country. On the basis of social identity theory (SIT), Olsen and Martins (2009) propose that expatriate's age may affect host country nationals' willingness to support, it has something to do with host country's culture. In Asian Confucian culture where seniority is respected and admired, HCNs are more inclined to support elder expatriates. On the other hand, in cultures without such disposition, senior and young expatriates are expected to be treated equally.

In addition, expatriates were asked about their education background, previous working experience, preparation time, length of sojourn, training programs availability and its effectiveness. With sufficiently large sample, researcher would be able to conduct multi regression analysis on those variables to establish potential correlations and possibly build models to optimize training offering.

Based on Black et al.'s multidimensional adjustment framework (1991), researchers also incorporated questions on expatriates' local social network, their affiliations and leisure activities in the host country to evaluate their engagement with host nationals and non-work adjustment in

general. Questions regarding challenges and cultural shock experiences, expatriate's motives would help better understand expatriate's learning objectives, so organizations and/or training agencies could adjust the training content accordingly.

Expatriates' mysteriously high turnover rate upon repatriation might partially stem from their motivations and expectations. Stahl and Cerdin (2004) surveyed expatriate managers of 20 French and 30 German MNCs mostly deployed in the U.S. Their study demonstrates a paradoxical attitude towards international assignments. The majority of the survey sample view an expatriate career as a risky career moves and is deeply concerned about repatriation, but they are still willing to accept international postings. This is particularly true for German expatriates. Analyzing the responses of relevant questions such as the motive of the expatriation and organizational loyalty, Stahl and Cerdin (2004) managed to offer a tentative explanation: German and French expatriates were developing a boundless career orientation like their U.S. counterparts. International experience, global leadership skills, intercultural capabilities are regarded as a competitive advantage that can be transferred across organizations. If upon return, these newly acquired skill sets are not well appreciated by the home organization as expected, over half of the German and one-third of French respondents are open to leave for better opportunities.

Since family related issue greatly affect expatriate's adjustment and job performance. Many researchers hold that expatriates' spouse may find it more challenging to adjust to the host country. Because compared to expatriates, they are more exposed to the outside world: they have to deal with different languages, consumption practices, stalled career (dual career couple), limited local connections and support. (Harvey, 1985; Avril & Magnini, 2007) For Children, getting used to the new school and making new friends is a major source of stress and anxiety.

Understanding their particular challenges and concerns, organizations would be able to provide them with customized programs and much needed assistance.

Lastly, expatriates' culture intelligence, "an individual's competence to function and manage effectively in culturally diverse settings"(Van Dyne, 2008, p.3), such as cultural awareness, flexibility, curiosity and open-mindedness could be interfered from individual's daily routine, does he/she follow any TV shows, read books and newspaper of the host country, has she/he been introspective and proactively adjusted their verbal and nonverbal communication methods to the host culture etc. Studies suggest that cosmopolitan consumers have a propensity to consume foreign cultural commodities like movies, books and music (Reifler et al., 2016). Respondents' preferences in these products also reveal their identity.

In a word, the author intends to identify key cross-cultural competences easily observable from expatriates daily acts and life style to help organizations improve their expatriate selection procedure.

Language (Q45~Q50)

Language can be a big hurdle for expatriates. In a survey (Hyslop, 2012) on a global mobility company, 61 percent of its senior managers rank local language deficiency as the top challenge for expatriates. Three fifth of the company presented agree that language plays a key role in the success of the assignment when expatriates have to move to a country where the home country language is not widely spoken. However, among the same sample companies only 37 percent actually include language training in their expatriate package. By cross-checking answers on expatriates' language proficiency, biggest challenge and the current language training offering, researchers would be able to assess the necessity of language training for organizations.

Harzing and Pudelko (2012) conducted a comprehensive study on language competences, policies and practices in MNCs to portray the importance of language differences. They gathered data from 800 subsidiaries headquartered in more than 25 countries. The subsidiaries selected operate in diverse industries and are geographically spread in 13 countries. Based on the English proficiency of the management in MNC's headquarter (HQ) and the importance of the language of the MNC's country-of-origin, countries are grouped into four clusters: Anglophone countries include the UK, USA and many Commonwealth countries, the Continental European countries including most of the western European countries like France, Germany, Austria, Belgium, Italy and Spain, the Nordic countries, and lastly the Asian countries. It is not surprising that for the first three clusters English is commonly chosen as the communication language between expatriates and host country nationals. The authors emphasized that Anglophone countries should be aware of English language's dominant position and avoid falling into the trap of ethnocentrism. Analyzing expatriate's language proficiency, his/her language environment especially where and when he/she speaks the mother tongue would enable researchers to empirically test Harzing and Pudelko's Theory (2012) and the validity of their concern on ethnocentrism.

Furthermore, the choice of corporate language(s) has multiple implications. It could be interpreted as a sign of power. Usually, HQ managers have a stronger command of corporate language proficiency compared to the local managers, this would further reinforce HQ's position of strength. However, when a third language is chosen as the corporate language, the phenomenon called "power- authority distortion" may occur. The power balance may tilt towards subsidiary managers with better language capabilities (Harzing & Pudelko, 2012).

In this logic, knowing organizations' language could help researcher decode MNCs HQ and subsidiary strategy and assess expatriates' roles and expectations in this regard.

CCT Training (Q51~Q59)

Though the effectiveness of CCT is still controversial in academia, the research gauges the proposition that CCT is effective as long as it is well structured. It covers the general topics proposed by Ferraro and Briody (2012) and is delivered by professionals within a reasonable time. One possible explanation for these competing arguments is the limited amount of empirical data. As Morris and Robie (2001) pointed out, few organizations make the effort to continuously monitor and evaluate the effectiveness of CCT, and for those few who did, seldom would they be willing to make the data public available. Moreover, some researches are methodologically flawed.

As Mendenhall et al. (2004) noted, sometimes trainees are asked to assess the effectiveness of the CCT program they just participated, when they haven't had the chance to evaluate its impact in the real-world scenarios. More importantly, the topic itself - the role of CCT - is not clearly defined (Puck et al, 2008, Wurtz, 2014). In such kind of evaluations, self-reported questions are inevitable. Thus, it is possible that answers might be influenced by individual's subjective perception and deviate from the truth.

Organizations are also eager to know if they want to offer CCT but had to choose between Pre-departure (PDCCT) and post-arrival CCT, which one would be a better option. Again, scholars hold divergent opinions on this subject. Caligiuri et al. (2001) believe in the usefulness of PDCCT claiming it helps expats set realistic expectations. Selmer's study on Swedish expatriates in Hong Kong also suggests PDCCT is the preferred choice (Selmer, 2001).

The benefits of post-arrival training on the other hand are notable as well. It is conducted while expats are already immersed in the new cultural environment. It has the innate advantage to address expats concerns and needs in a timely manner (Mendenhall & Stahl, 2000; Mendenhall, 1999).

To date, comparative empirical research has been done. Expatriates who participated in the training programs are the most qualified to speak on this question. In the online survey, they were asked to rank the effectiveness of PDCCT and Post arrival CCT in a matrix table and the overall effectiveness of the CCT if the two were offered sequentially.

As explained previously in the literature section, training method is another important factor that impact CCT's effectiveness. In the survey, respondents were requested to rate various training methods by its effectiveness hoping to provide some generalizable results to organizations and training agencies. These insights would be of great value if the sample were large and diverse.

Stereotype (Q60~Q64)

Stereotyping people of other nationalities is to some extent a natural tendency. This "social evaluation" can be either positive or negative. Olsen and Martins (2009) argue that expatriates who come from "prestigious" countries in the eyes of HCNs would be likely to receive the latter's support. Thus, they would find it easier to integrate. By contrast, those from "less prestigious" nations may feel marginalized, resented or even excluded. It would be interesting to see if expatriates are conscious of the issue and the potential connection. Researcher could also group the surveys by respondents' country of origin to find out if similarities exist. The phenomena of stereotyping directly impact expat's adjustment; it is better to be included in the CCT curriculum.

Food (Q 65~73)

As a special consumer segment, expatriates' consumption pattern is under scrutiny by marketers. Gilly (1995) claims that expatriates may get frustrated familiarizing themselves with host country's consumer customs. They aspire to certain products (e.g. food) from their country of origin and seek to procure them through their social networks. This dependence and preference unveil expatriates' attachment to their home country.

Riefler et al. (2016) point out that cosmopolitan consumers share some common characteristics: first of all, they are open-minded towards and more important willing to interact with other people and cultures. (Reifler et al. 2016; Hannerz, 1990). Secondly, they genuinely respect and embrace cultural diversity, they appreciate a wide variety of products from different countries instead of sticking to the same brands. In addition, cosmopolitan consumers consciously choose products and services outside its home country in pursuit of a new experience.

Expatriates' lifestyle, their special taste in food for instance, could help assess if it is legitimate to categorize them as cosmopolitan consumers or from an identity perspective, if they have truly assumed a cosmopolitan identity.

Organization (Q74~Q77)

Black et al. (1991) call for more attention to the job and organizational factors and their potential impact on expatriates' adjustment. As mentioned previously, Europe has a high level of public employment, a fast growing number of SMEs, well-developed manufacturing and service sectors, and not counting how many global cities (e.g. Brussels, Genève, London, Paris) it has, that host numerous MNCs, intergovernmental organizations, NGOs etc. Fenner and Selmer (2008) studied expatriates in the public sectors to see if their adjustment process would be different from their counterparts in the private sectors, given the distinctive organizational

characteristics such as bureaucracy, hierarchy and rule enforcement (Parker & Brandley, 2000) Though their pioneering research indicated the two basically follow the same path, the question worth further investigation. The survey would provide researchers with more data for comparison. Additionally, with more information on expatriates' home organizations, researchers could better understand from the demand side what types of organizations are more disposed to send expatriates overseas. Researchers can benchmark with existing literature to see if there is any shift in trend.

Working environment (Q78~Q86)

In this section (from question 78 to 86), the questions are centered on key components of organization culture such as organization's expatriate performance appraisal (EPA) practices, leadership style, and decision-making process. Since it's the last section of the questionnaire, it as well culminates in a self-assessment question on expat's identity.

Briscoe and Schuler (2014) articulate that to successfully manage expatriates, organizations should adjust its appraisal system in recognition of local practices rather than mechanically following a standardized system. Researchers are interested to know if organizations have made such adjustments. For instance, whether expatriate performance reviews are performed more frequently in their transitional phase into the host organization to provide them with clearer expectations and timely feedback?

As highlighted by Kohonen (2005), international assignments can be viewed "as a place for expatriates' identity construction". She explains that expatriates have to undergo a series of personal and professional transitions. Expatriates need to cope with cultural novelty and maintain equilibrium between parent company and the host company, this would contribute to the development of a multicultural identity. Arnett predicts that with globalization, more and more

people are developing bicultural identity, identity becomes based less on prescribed social roles and more on individual choices" (Arnett, 2002, p.781). Researchers are curious to know how respondents would prefer to identify themselves and if their choice is consistent as their narratives suggested.

Furthermore, understanding expatriates' perception of organizational culture differences would provide insights on the content of CCT making it more relevant for the attendees.

Sample and Data Collection

The target samples are organizational expatriates currently working or worked in the United States whose age fall between 18 and 64. These selection criteria were clearly communicated to the participating institutions listed in the following section, so that they can serve as first "gatekeepers." The selection criteria were explained in the body of the sample recruiting emails, and stated in the beginning of the survey so individual respondent could perform self-evaluation. Moreover, personal data regarding age, country of origin will be collected through the survey; respondents who don't fit the criteria could be filtered out by the system. The target sample size is 30.

Researcher approached to institutions, European MNCs, consulting firms requiring their support. These organizations helped further distribute the survey via email to affiliated member organizations, their employees, faculties and clients that could fit the predefined profile.

Before officially sending out the survey link, pretests were performed by committee members making sure the survey flow smoothly, all the questions were clearly stated and the visualization was satisfactory. It took approximately 20 minutes to complete the whole survey.

The survey was by invitation only. Potential respondents received an email with a link to access to the online survey either from abovementioned institutions or directly from the researchers.

The link went active from the 15 of June to the 27 of June. Within this period, respondents had the freedom to complete the survey independently at any time and at any place with Internet connection. Data was collected directly through the online survey developed using Qualtrics survey software. Responses were anonymized, meaning personal information was not recorded. As per the request of IRB Office (IRB protocol number: 16908), the first question was designed and set mandatory to collect individual respondent's official consent.

However, for various reasons, the response rate was much lower than expected. Researchers began to build up contacts as early as February, but most of the email went unanswered. For instance, researchers sent emails to seven European Consulates in Chicago, only two of them responded. Second, the timing of the survey is not ideal, the survey went live in the middle of June when the summer holidays season had begun, many contacts evaporated. Third, there was little time left for the researchers to further promote the survey or to take other remedial measures like hard copy survey or face-to-face interviews. Initially, the researchers considered providing certain amount of monetary incentive to participants to boost survey responses. The idea was soon rejected in the absence of funding. Time wise, such an approach was not feasible since it would further complicate the IRB application. The challenges have been clearly identified and will permit in a later time to build on this research and expand the reach of the model created.

By the deadline, four responses were collected in total, of which only two data sets were complete.

Results and Discussions

Despite the small sample size, the researchers still had some interesting findings. Both of the respondents were originally from France. To distinguish the two, they are labeled as FR1 and FR2.

FR1 is a single man in the age group of 25-34, he has been in the U.S. for over one but less than three years. FR 2 is a married female who has stayed in the U.S. for over ten years. Despite the differences in basic demographics, the two have a lot in common. First, they both have master degree, their education level corresponds to the conventional profile of an expatriate professional. Second, both of them are multilingual, an indication of cultural awareness and international orientation. This could also derive from the fact that organizations are more willing to send expatriates with superior language skills, many times local language proficiency is listed as a prerequisite or at least as a preferred qualification.

Moreover, the two respondents strongly prefer food from home country and they stay connected with their friends and family in France communicating with them on weekly basis. At the same time, they are also culturally flexible, for both of them ranked ethnic restaurants as favorite. As anticipated, they possess seemingly contradictory traits: strong homeward bound and cosmopolitan orientation. It was also worth noticing that the close local friends they have were either old friends or one from extended social circle. It seems that the two were not committed to expanding their local network. Between the two samples, FR2 is less dependent to the home country food, this might have something to do with her much longer period of sojourn.

To overcome language barrier is the biggest challenge for FR1, but for FR2 cross culture gap is the toughest task. Surprisingly, both had language training pre departure, but neither of them actually took cross-cultural training. It would be interesting to know if their home organizations actually provided CCT programs. If the answer is positive, the programs might not be well

promoted within the organization, and employees are not aware of its existence. It is also possible that the two intentionally choose not to attend the training either because of their overconfidence on their cross-cultural competencies or the negative comments they've received from colleagues. Brook Global Relocation Service 's 2008 Global Trends Survey reported that 84% of the company represented had cross-cultural training (CTT) programs in place, yet only 23 percent require mandatory participation (Brook Global Relocation Services, 2008).

For FR1 time constraint might be the reason, since he had less than three months to prepare himself for the assignment, CCT was simply not his top priority.

As for the identity, both identify themselves as expatriates rather than locals. This might explain why they are open to permanent residency in the U.S., but reluctant to naturalize. Since U.S.-France dual citizenship is well accepted, visa is not an issue. The resistance to identity shift might be the underlying cause. Nationality is a source of identity ascribed to individuals at birth. For this nature, Kohonen contends that national identity "belongs to the very core of the self" (2005, p.25).

Additionally, FR1 and FR2 both view leaders in the U.S. to be approachable. This is not hard to understand. Based on Hofstede's culture dimensions theory, the U.S. in comparison to France, scored much lower under power distance dimension suggesting a less hierarchical organizational design, a more equal supervisor-subordinate relationship and a relatively informal way of communication.

Chapter 5

Conclusions

In a world becoming smaller and more interconnected, people/labor are increasingly forced to travel and work abroad. The speed of communication and interaction is not going to decline. As proven in this thesis, corporations need to develop stronger instruments in order to guarantee the success of their expatriate workers. Their integration in host countries and societies is a key influencing factor on the productivity of the company as well as well-being of expatriates.

In this thesis, the researchers are interested in studying European expatriates in the U.S. supplying with latest empirical data gathered from the online survey. It is expected that the survey data could help piece together expatriates' adjustment and acculturation process and assess the impact of organizational support especially in cross-culture training during the entire expatriate cycle.

Though the results are inconclusive due to limited number of responses collected under tight time frame, the research has identified a number of expatriate success predictors including personal traits, job and organizational factors by primarily reviewing existing literature. The design of the survey is proven valid and when time allows it could be relaunched. Having more time, the researchers would be able establish and foster stronger relationships with target organizations, with their support and push from the within, the response rate of the survey would be greatly improved. In addition, researchers could adopt other approaches like phone interviews, mail in surveys and perhaps use lottery incentive to facilitate information gathering. The research results will be valuable for all the stakeholders involved. It could help organizations minimize the risks and costs associated with expatriate failures. Academically, it would offer a

wide array of much needed empirical data on expatriate adjustment and the effectiveness of CTT. The Study will also contribute to the design and development of training programs generating value for cross-cultural training agencies and consulting firms. For international expatriates, it offers them a great opportunity to be introspective reflecting on their personal experiences and possibly learn from others who have been in a similar situation. In this way, they will be better prepared intellectually and psychologically for future international assignments. Following the narrative approach, future research on CTT effectiveness could incorporate surveys of trainers including corporate HR, professional instructors and consultants. Additionally, researchers could consider interviewing local managers in host organizations to gain their insights on the subject, and to see if it's worthwhile to provide them CCT training as well, as the Culpans recommended (R. Culpan & O. Culpan, 1993).

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Appendix A

Questionnaire “Cross Cultural Training – Final”

Q1 I volunteer to participate in a research project conducted by Mian Duan from University of Illinois at Urbana Champaign. I understand that the project is designed to gather information to assess the global business culture especially the impact of training on international expatriates.

1. My participation in this project is voluntary. I understand that I will not be paid for my participation. I may withdraw and discontinue participation at any time without penalty. If I decline to participate or withdraw from the study, no one will be told.

2. I understand that most participants will find the survey questions interesting and thought-provoking. If, however, I feel uncomfortable in any way during the survey, I have the right to decline to answer any question or to end the survey. It is a one-time survey and will take approximately 20 minutes to complete.

3. I understand that the researcher will not identify me by name in any reports using information obtained from this survey, and that my confidentiality as a participant in this study will remain secure. Subsequent uses of records and data will be subject to standard data use policies, which protect the anonymity of individuals and institutions. If required by laws or University Policy, study information which identifies you may be seen or copied by the following people or groups:

- The university committee and office that reviews and approves research studies, the Institutional Review Board (IRB) and Office for Protection of Research Subjects;
- University and state auditors, and Departments of the university responsible for oversight of research

4. I understand that this research study has been reviewed and approved by the Institutional Review Board (IRB) for Studies Involving Human Subjects at the University of Illinois at

Urbana Champaign. For research problems or questions regarding subjects, the Institutional Review Board may be reached via email: irb@illinois.edu or at Tel No. 217-333-2670. If you have any research related question, please contact Prof. Emanuel Rota at (217) 300-1294 or email him at rota@illinois.edu. The voluntary consent will be obtained once from respondents- adults aged between 18 and 64 yrs. of age.

- I have read and understand the explanation provided to me. I have had all my questions answered to my satisfaction, and I voluntarily agree to participate in this study. (1)
- I have read and understand the explanation provided to me, but I choose not to participate in this study. (2)

Q2 Age:

- 18~25 (1)
- 25~34 (2)
- 35~44 (3)
- 45~54 (4)
- Above 55 (5)

Q3 Gender I identify my gender as:

- Male (1)
- Female (2)
- Trans (3)
- Other (4) _____

Q4 Marital status: Are you currently married?

- Yes (1)
- No (2)

Q5 Country of Origin:

Q6 Education Background What is the highest degree or level of school you have completed?

- High School/GED (1)
- Some College (2)
- Bachelor's Degree (3)
- Master's Degree (4)
- Advanced Graduate work or Ph.D. (5)

Q7 Education Background What is your undergraduate major?

Q8 Education Background What was your graduate major, if applicable?

Q9 How long have you been living in a foreign country?

- Less than a year (1)
- 1~3 years (2)
- 4~6 years (3)
- 7~9 years (4)
- More than 10 years (5)

Q10 How much time did you have to prepare yourself for this overseas assignment, in other words the time between offer acceptance and the start date?

- Less than a month (1)
- 1~3 months (2)
- 4~6 months (3)
- 7~9 months (4)
- 10~12 months (5)
- More than a year (6)

Q11 Was moving to foreign country part of your original contract?

- Yes (1)
- No (2)

Q12 Do you consider this experience to be a positive factor for your career?

- Extremely positive (1)
- Moderately positive (2)
- Neither positive nor negative (3)
- Moderately negative (4)
- Extremely negative (5)

Q13 Do you think such experience would add value to your

- Personal life (1)
- Economic status (2)

- Social status (3)
- Career advancement (4)
- Other, Please specify (5) _____

Q14 Have you ever worked abroad before this assignment?

- Yes (1)
- No (2)

Q15 If you have a family are any members of your family live here with you?

- Yes (1)
- No (2)

Q16 Do you have any close local friends?

- Yes (1)
- No (2)

Q17 Did you know them before moving to the country?

- Yes (1)
- No (2)

Q18 When did you get to know your first local friend(s) after your arrival in the host country?

- Within the first month (1)
- 1~3 months (2)
- 4~12 months (3)
- In the second year (4)
- Between the third and fifth year (5)
- More than six years later (6)

Q19 How did you meet them?

- At school (1)
- At work (2)
- Online (3)
- Social space (e.g. parties, parks, bars, coffee shops, gyms, restaurants) (4)
- Other (5) _____

Q20 Upon arrival, were you surprised by anything in the host country?

- Yes, please specify (1) _____
- No (2)

Q21 Through what channels do you acquire information about the host country?

- Books (1)
- Magazines (2)
- TV shows (3)
- Movies (4)
- Blogs (5)
- Social media (6)
- Websites/apps of other news outlets such as Google news, Wikipedia, Yahoo (7)
- Local connections (8)
- Field trips/Travelings (10)
- Others, please specify (9) _____

Q22 Was the lifestyle in the host country similar to what you expected?

- Yes (1)
- No (2)

Q23 Could you identify one thing that you really like about the host country?

Q24 Could you identify one thing you dislike about the host country?

Q25 Could give an example of something that you believed in but turned out to be false?(e.g. culture, life style, values...)

Q26 How often do you talk / video chat/ interact via social media with your family members or old friends in your native country? Please select the alternative that best describes the frequency.

- Seldom (1)
- Everyday (2)
- Every week (3)
- Every month (4)

Q27 Generally, how long does an average communication last?

- Less than 10 minutes (1)
- 11 ~ 29 minutes (2)
- 30 ~ 59 minutes (3)
- More than one hour (4)

Q28 Have you joined any groups or associations to stay connected to your native culture?

- Yes (1)
- No (2)

Q29 Are you subscribed to any materials (either electronically or printed) from your home country?

- Yes (1)
- No (2)
- Maybe (3)

Q30 Do you watch movies/ TV series/ News programs from the host country and the home country, if so, how often?

	Movies		TV Series		News programs	
	Host country (1)	Home country (2)	Host Country (1)	Home country (2)	Host Country (1)	Home Country (2)
Every day (1)	<input type="radio"/>					
Twice a week (2)	<input type="radio"/>					
Once a week (3)	<input type="radio"/>					
Once a month (4)	<input type="radio"/>					
Seldom (5)	<input type="radio"/>					

Q31 How often do you go out with your local friends and/or colleagues? Please check the alternatives that best describe the frequency.

- Everyday (1)
- Twice a week (2)
- Once a week (3)
- Once a month (4)
- Seldom (5)

Q32 Do you follow any sport events in the host country?

- Yes (1)
- No (2)

Q33 Please kindly provide one example

Q34 So far what are the biggest challenges you've encountered in cross-cultural communications?

Q35 Is/are issue(s) mentioned above addressed during the training?

- Yes, all of them (1)
- Yes, partially (2)
- No, none of them (3)

Q36 Have you adopted any verbal or nonverbal communication skills and tactics in the host country? Do you find it/them helpful? Could you give us an example?

Q37 Have such perception changed over time?

- Yes (1)
- Maybe (2)
- No (3)

Q38 Could you specify when and why this shift in perception happened?

Q39 Are you considering the possibility to become the permanent resident of the host country?

- Definitely yes (1)
- Probably yes (2)
- Might or might not (3)
- Probably not (4)
- Definitely not (5)

Q40 Would you consider becoming a citizen of the host country one day?

- Definitely yes (1)
- Probably yes (2)
- Might or might not (3)
- Probably not (4)
- Definitely not (5)

Q41 Would you consider taking another international assignment in the future?

- Yes (1)
- Maybe (2)
- No (3)

Q42 What are the biggest challenges for your partner living in the host country?

- Establishing local network (1)
- Lack of career opportunities (2)
- Lack of transitional assistance (3)
- Language barriers (4)
- Kids' education (5)
- Other (6) _____

Q43 Did your company /organization provide training to your partner?

- Yes (1)
- No (2)

Q44 What kind of assistance and/or resources has your partner at his/her disposal?

Q45 How many languages do you speak?

- One (1)
- Two (2)
- 3 ~ 5 (3)
- More than 5 (4)

Q46 What is your working language(s)?

Q47 How often do you use your mother tongue(s)?

- Never (1)
- Less than once a month (2)
- 1-3 times a month (3)
- Once a week (4)
- 2-3 times a week (5)
- 4-5 times a week (6)
- More than 5 times a week (7)

Q48 Do you speak your mother tongue(s) at home?

- Yes (1)
- No (2)

Q49 Do you speak your mother tongue(s) at workplace?

- Yes (1)
- No (2)

Q50 Did you have any language training before moving to a foreign country?

- Yes (1)
- No (2)

Q51 Did you have any cultural training before moving to a foreign country?

Yes (1)

No (2)

Q52 How long was the cultural training?

Q53 Are you satisfied with the cultural training program provided?

Highly satisfied (1)

Satisfied (2)

Neither satisfied nor dissatisfied (3)

Dissatisfied (4)

Highly dissatisfied (5)

Q54 Do you consider the training provided to be

Insufficient (1)

Sufficient (2)

More than enough (3)

Q55 The training received helped you with

Social life (1)

Professional life (2)

Family life (3)

Other, please specify (4) _____

Q56 What is the most important new idea you learned from the program?

Q57 Did you have any post arrival training(s)?

Yes (1)

No (2)

Q58 Please rate its effectiveness of the training you received

	Highly effective (1)	Effective (2)	Neither effective nor ineffective (3)	Ineffective (4)	Highly ineffective (5)
Before coming to the country (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Post arrival (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
overall effectiveness of the training programs(both pre and post arrival) (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q59 Please rank the following training methods, with 1 being the most effective and 9 being the least effective.

_____ Web-based training programs (1)

_____ Role playing (2)

_____ Lectures (3)

_____ Video/movies (4)

_____ Assigned readings (5)

_____ Group discussions (6)

_____ Case Studies (7)

_____ Mentoring Programs (8)

_____ Other, please specify (9)

Q60 Do you feel that citizens of the host country are inclined to stereotype people from your country?

Yes (1)

Maybe (2)

No (3)

Q61 Do you perceive these stereotypes as

Mostly positive (1)

Neutral (2)

Mostly negative (3)

Q62 Are there any stereotypes in your home country on citizens in the host country?

- Yes (1)
- Maybe (2)
- No (3)

Q63 Do you perceive these stereotypes as

- Mostly positive (1)
- Neutral (2)
- Mostly negative (3)

Q64 Were such stereotypes addressed in your training?

- Yes (1)
- No (2)

Q65 Do you eat food from your home country in the host country?

- Yes (1)
- No (2)

Q66 On a weekly basis, how often do you eat traditional food of your home country?

- Never (1)
- Once (2)
- 2 ~ 4 times (3)
- More than 5 times (4)

Q67 On a weekly basis, how often do you eat traditional food of your home country?

- Never (1)
- Once (2)
- 2 ~ 4 times (3)
- More than 5 times (4)

Q68 On a weekly basis, how often do you eat typical food of the host country?

- Never (1)
- Once (2)
- 2 ~ 4 times (3)
- More than 5 times (4)

Q69 Where do you generally purchase your grocery?

- Supermarkets (1)
- local Shops (2)
- Online (3)
- Other (4) _____

Q70 Have your friends or relatives in your home country ever mailed you food or ingredients ?

- Often (1)
- Occasionally (2)
- Rarely (3)
- Never (4)

Q71 Do you go to restaurants with?

- Coworkers (1)
- Friends (2)
- Family members (3)
- Other (4) _____

Q72 Is your favorite restaurant ethnic (including your own ethnicity)?

- Yes (1)
- No (2)

Q73 How would you rate the food offering where you currently live in general?

- Very poor (1)
- Poor (2)
- Average (3)
- Good (4)
- Excellent (5)

Q74 What's the size of your organization by number of employees?

- 1~ 49 (1)
- 50 ~ 99 (2)
- 100 ~ 499 (3)
- 500 ~ 999 (4)
- Over 1000 (5)

Q75 Is your current organization public or private?

- Public (1)
- Private (2)

Q76 What best describes the type of organization you work for?

- MNE (Multinational Enterprise) (1)
- Government (2)
- NGO (Non-governmental Organization) (3)
- Education Institution (4)
- Other, please specify (5) _____

Q77 If your answer to the previous question is MNE (Multinational Enterprise):

What is the primary sector(s) in which your current organization operates?

- Manufacturing (1)
- Services (2)

Q78 Job Level / Job Title Which of the following most closely matches your job title?

- Intern (1)
- Entry level (2)
- Manager (3)
- Senior manager (4)
- Director (5)
- Vice President (6)
- Senior Vice President (7)
- President or C level executive (8)
- Owner (9)
- Other (10) _____

Q79 In your host culture, what are the qualities that a good leader should possess? Please rank the following characteristics by its importance, with 1 being the most important and 7 being the least important.

- _____ Leadership (1)
- _____ Communication (2)
- _____ Team play (3)
- _____ Technical Competence (4)
- _____ Creativity (5)
- _____ Commitment (6)
- _____ Other (7)

Q80 Are leaders generally approachable in the host country?

Yes (1)

No (2)

Q81 Are leaders expected to give clear instructions to their subordinates to get jobs done in your home country?

Yes (1)

No (2)

Q82 Does gender prevalence among leadership positions exist in your home country?

Yes, in my home country there are more male leaders (1)

Yes, in my home country there are more female leaders (2)

No, in my home country on average there is an equal number of men and women in leadership positions (3)

Q83 What are the commonly used employee evaluation metrics in your home country, please rank the following based on its importance, with 1 being the most important and 7 being the least important.

- _____ Communications (1)
- _____ Self-motivation (2)
- _____ Interpersonal skills (3)
- _____ Decision-making ability (4)
- _____ Professional knowledge/ skill (5)
- _____ Leadership (6)
- _____ Other (7)

Q84 How often are employees evaluated in home country?

- Monthly (1)
- Quarterly (2)
- Biannually (3)
- Yearly (4)
- Other (5) _____

Q85 What are the conventional decision making process in the organization of your home country?

	Conventional decision making process	
	Home Country (1)	Host Country (2)
Top down approach (1)	<input type="radio"/>	<input type="radio"/>
Bottom up approach (2)	<input type="radio"/>	<input type="radio"/>
A hybrid of both (3)	<input type="radio"/>	<input type="radio"/>

Q86 How would you prefer to identify yourself now in the host country?

- A foreigner (1)
- An expatriate (2)
- A tourist (3)
- A local (5)
- Other, please specify (4) _____

Appendix B

IRB Approval

UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

Office of the Vice Chancellor for Research
Office for the Protection of Research Subjects
528 East Green Street
Suite 203
Champaign, IL 61820



June 14, 2016

Emanuel Rota
French and Italian
2090 FLB
707 South Mathews Avenue
Urbana, IL 61801

RE: *Assessing a Successful Global Business Culture: European Expatriates in the U.S. and the Impact of Their Cultural Training for International Organizations*
IRB Protocol Number: 16908

Dear Dr. Rota:

Thank you for submitting the completed IRB application form for your project entitled *Assessing a Successful Global Business Culture: European Expatriates in the U.S. and the Impact of Their Cultural Training for International Organizations*. Your project was assigned Institutional Review Board (IRB) Protocol Number 16908 and reviewed. It has been determined that the research activities described in this application meet the criteria for exemption at 45CFR46.101(b)(2).

This determination of exemption only applies to the research study as submitted. Please note that additional modifications to your project need to be submitted to the IRB for review and exemption determination or approval before the modifications are initiated.

Copies of the attached, date-stamped consent form(s) are to be used when obtaining informed consent. If there is a need to revise or alter the consent form(s), please submit the revised form(s) for IRB review, approval, and date-stamping prior to use.

Exempt protocols will be closed and archived five years from the date of approval. Researchers will be required to contact our office if the study will continue beyond five years. If an amendment is submitted once the study has been archived, researchers will need to submit a new application and obtain approval prior to implementing the change.

We appreciate your conscientious adherence to the requirements of human subjects research. If you have any questions about the IRB process, or if you need assistance at any time, please feel free to contact me at OPRS, or visit our website at <http://oprs.research.illinois.edu>

Sincerely,


Leanne Carson
Human Subjects Research Specialist, Office for the Protection of Research Subjects

Attachment(s)

c: Mian Duan
Maxime Larive

Cross Cultural Training

Q1 Consent for Participation in Interview Research

I volunteer to participate in a research project conducted by Mian Duan from University of Illinois at Urbana Champaign. I understand that the project is designed to gather information to assess the global business culture especially the impact of training on international expatriates.

1. My participation in this project is voluntary. I understand that I will not be paid for my participation. I may withdraw and discontinue participation at any time without penalty. If I decline to participate or withdraw from the study, no one will be told.

2. I understand that most participants will find the survey questions interesting and thought-provoking. If, however, I feel uncomfortable in any way during the survey, I have the right to decline to answer any question or to end the survey. It is a one-time survey and will take approximately 20 minutes to complete.

3. I understand that the researcher will not identify me by name in any reports using information obtained from this survey, and that my confidentiality as a participant in this study will remain secure. Subsequent uses of records and data will be subject to standard data use policies, which protect the anonymity of individuals and institutions. If required by laws or University Policy, study information which identifies you may be seen or copied by the following people or groups:

- The university committee and office that reviews and approves research studies, the Institutional Review Board (IRB) and Office for Protection of Research Subjects;
- University and state auditors, and Departments of the university responsible for oversight of research

4. I understand that this research study has been reviewed and approved by the Institutional Review Board (IRB) for Studies Involving Human Subjects at the University of Illinois at Urbana Champaign. For research problems or questions regarding subjects, the Institutional Review Board may be reached via email: irb@illinois.edu or at Tel No. 217-333-2670.

If you have any research related question, please contact Prof. Emanuel Rota at (217) 300-1294 or email him at rota@illinois.edu.

The voluntary consent will be obtained once from respondents- adults aged between 18 and 64 yrs. of age.

- I have read and understand the explanation provided to me. I have had all my questions answered to my satisfaction, and I voluntarily agree to participate in this study. (1)
- I have read and understand the explanation provided to me, but I choose not to participate in this study. (2)

University of Illinois at Urbana-Champaign
Institutional Review Board

Approved: _____ 6/14/2016
IRB #: _____ 16908