

**THE EXPATRIATE EPISODE:
AN INVESTIGATION INTO THE
CULTURAL DIMENSIONS
OF RELOCATION**

by

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This dissertation is dedicated to my husband Peter,
and to my children Alex and Megan.

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DECLARATION

I declare that the dissertation, which I hereby submit for the degree of Master of Arts in Anthropology at the University of Pretoria, is my own work and has not previously been submitted by me for a degree at another university. Where secondary material is used, this has been carefully acknowledged and referenced in accordance with university requirements.

Kathi Tarantal

Date

SUMMARY

The aim of this dissertation was to explore the cultural dimensions of relocating to another country. This included identifying the main differences and difficulties that expatriates faced in an ‘expatriate episode’, i.e. in adapting to a new work and socio-cultural environment abroad as well as re-adapting when repatriating to their home countries. More than 180 expatriates were interviewed, from 30 countries of origin, and relocating to 60 different countries. Where possible, face-to-face interviews were conducted. E-mail interviews were used to converse with interviewees located far from the researcher, and this method proved helpful and reliable.

Findings of earlier researchers were tested for relevance. The main findings of cultural differences identified in the workplace showed that although Hofstede’s dimensions of power distance, uncertainty avoidance, individualism versus collectivism, and masculinity and femininity are still relevant, new models are needed. Other business differences were discussed, including the importance of building relationships before doing business, conducting meetings appropriately, understanding the role of women, obtaining status, and motivating employees. The practical implications of these differences were identified. In many situations, knowing about these differences allowed the expatriates to adjust their behaviour successfully. Expatriates who were not in managerial positions often either had to accept the new ways or find a new job.

Expatriates had to learn to communicate effectively, adjusting to differences in verbal and non-verbal communication. Speaking a new language was the most obvious difference, while other aspects, such as language pace, degrees of formality, directness, showing emotions when communicating, and showing disagreement varied between cultural domains. Non-verbal aspects of communication, such as touch, personal space, eye contact, gestures and posture also differed. If the expatriates understood the cultural norms in their new domain, they could choose if they wanted to adapt or not. It also helped them avoid misinterpreting and making wrong judgments about other people’s behaviour.

Most expatriates went through a 3-stage adjustment process. Knowing that they would likely experience difficulties did not prevent these from happening, but it did help them to cope. Difficulties included inner turmoil, anger towards their new environment and loneliness. Non-working spouses were lonelier as they usually did not have a job and the support network that accompanies it. Support from family and friends, both other expatriates and locals, helped expatriates the most to adjust, especially the spouses. Other helpful things were making choices, understanding the new cultural domain, and joining in local activities.

Helpful resources for expatriates were identified, which included cultural training and information about the new country, new friends and local literature. In retrospect, expatriates wished they had obtained more information about the country, learnt the local language, made better choices, planned differently, and known themselves better.

More than half of those expatriates who had repatriated to their home countries said that this process was more difficult than moving to a new country, which came as a big surprise to many. Their main difficulties included being judgmental towards their home country and its people, and feeling alone and misunderstood.

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CHAPTER 1

INTRODUCTION

1.1 PROBLEM STATEMENT

In this era of globalization, people from different countries come into contact with one another more often than ever before in history. This is a consequence of the fact that people travel to different countries – either for business or pleasure – more extensively than in the past. With the recent technological advances, travel has become faster, cheaper and safer, and both young and old take advantage of this fact to travel, study and work abroad. With the creation of the European Union, travel between many European countries is considerably easier. Fewer visas are necessary and visitors do not need to change currency at every border (see Hess & Linderman 2002:xv; Kohls 2001:5).

Apart from the increasing global movement of humans, information is also moving at an unprecedented rate across man-made borders and all around the world. With e-mail technology and the Internet, information can be transmitted almost instantaneously to people located very far from one another. People can ‘meet’ new people from very distant places in Internet chat rooms and communicate via e-mail. People can ‘visit’ other places by watching television, browsing the Internet and reading magazines. It is also possible for people who will never meet each other in person to work together on projects in virtual teams and task forces (see Lipnack & Stamps 1997:25-49; Wallace 2004:157-190).

Many companies conduct business outside of their own country, requiring managers to take business trips abroad. Some mergers and acquisitions now have international dimensions that necessitate communication, negotiation and making contracts with ‘foreigners’. This creates a need for an awareness of, and specific information on, the culturally determined differences in symbols, beliefs and behaviour patterns that may be encountered in other countries (see Pinto 2000:12).

People in different places have different ways of doing things and have different definitions of what is right and appropriate in particular settings or circumstances. International visitors need to know what social behaviour is acceptable in the countries that they visit. What is

expected and appropriate in one cultural milieu may be offensive in another (see Mitchell 2000; Lewis 1999a). Without information regarding the customs and norms of the people one meets with, mistakes, misunderstandings and discomfort become inevitable. The converse is also true; having the necessary information can help people understand each other and make relationships smoother.

Business practices also differ from country to country and this needs to be understood by people working in an international business setting. From my experience with management teams, even those whose members are from the same country see issues from different points of view. When a team consists of people from different countries, the potential is even greater for misunderstandings and conflicts to occur. Leadership styles and the decision making process are two examples of many variations that need to be considered. The growth in international business has highlighted these differences in value systems and behaviour patterns. Many international business negotiations and ventures have failed because of the lack of cultural awareness and understanding (see Hall 1995:5).

Living as an expatriate, however, is much more complex than taking a business trip, as the expatriate must learn how to live and work amongst people who have different values and customs. Tourists and people on business trips do not have to make as many adjustments as expatriates because they know that they will not have to tolerate many of their difficulties for very long. Expatriates, on the other hand, may have to live with these differences for a considerable time.

Unfortunately some expatriates do not adjust well to their new working or living environments. Companies that send managers and executives to live and work in other countries make a huge financial investment for these people to relocate (see Storti 2001a:107). For the benefit of both the expatriate and the company, many expatriate managers are now provided with a cultural orientation or training programme to help them learn how to live and work successfully in a different country (see Hofstede 1994:232, 239). In these training programmes, information is provided to the expatriates-to-be about the new country and they are introduced to the values and customs of the people with whom they will be working and living.

If an entire family relocates, it is important to address the adjustment issues of each family member. Many times the working person – usually but not always the husband – is quite fulfilled at work. The spouse, however, often lacks the support and comforts s/he was used to at home and s/he has more difficulty developing a new support network (see Hess & Linderman 2002:205-227; Storti 2001a:15-18).

How much an expatriate chooses to integrate and adapt to new ways of thinking, reacting and doing things is a question that each individual needs to answer. Invariably people change and grow as a result of living in another country. They no longer take for granted the way their compatriots react to and do things and they often choose to incorporate new behavioural patterns into their lives.

In spite of westernisation, both surface and deep differences exist between people from different cultural domains. This is evidenced by the fact that most expatriates have difficulties adapting to new living and working environments. Many expatriates who move for business purposes enjoy a high standard of living, but even so, they experience many hardships in their cultural adaptation process. Some are better prepared than others and this plays a role in their ability to overcome their difficulties. The aim and objectives of this dissertation could be compared to taking a photograph of something that is moving rapidly. Perhaps some of these issues will be different in 20 years time, but they are the realities of the present.

1.2 AIM AND OBJECTIVES

In recent decades there has not only been an increase in international business ventures, but there has also been an increase in the number of people who actually relocate to another country. The term ‘**expatriate**’ will be used in this dissertation to describe a person who lives outside of his/her home country, either on a permanent or a temporary basis. There is no negative connotation attached to this term. An ‘**expatriate episode**’ is defined as the period in an expatriate’s life from the time s/he decides to relocate to another country until s/he re-integrates into life back home again after living in another country or decides to remain in the new country permanently.

The aim of this dissertation is to identify the main difficulties of a cultural nature that expatriates face in the course of the expatriate episode. The specific objectives are:

- To determine whether earlier (pre-1980) research findings about the cultural problems experienced by expatriates are currently still relevant and applicable.
- To ascertain the differences in *verbal* and *non-verbal communication* patterns in the daily lives of expatriates between their home and new cultural domain.
- To identify the most stressful socio-cultural adaptations that expatriates currently have to make during the expatriate episode, both in their new social environment and also when returning to their country of origin. Attention will be given to the adaptations necessary in both their work and social settings. The extent to which expatriate workers, and/or their spouses share the difficulties of coping with a new socio-cultural environment will also be investigated.
- To identify the most obvious ways and means of overcoming the socio-cultural difficulties experienced during the expatriate episode. The information, relationships and activities that were most helpful to expatriates will be identified, as well as whether prior orientation or training helped to reduce some of the stress during the expatriate episode.
- To prove that virtual interviews by way of e-mail correspondence provided adequate and reliable qualitative information in instances where research participants were located far away from the researcher.

In this dissertation a broad range of expatriate experiences were investigated. Expatriates from 30 countries of origin relocating to 60 different countries of destination have been interviewed. Because of the broad spectrum of issues that were addressed, it was neither possible nor intended to go into depth on any of these issues. A complete dissertation could be written on any one of them. It was also not intended to concentrate on specific countries and to provide information about particular countries, but rather to look at general issues.

In many cases the researcher only had contact with a working person and not with his/her spouse. Children were not interviewed, so when issues facing children are mentioned, it is only from the perspective of the parents. All of the respondents who participated in this research chose to relocate. Most of them relocated for business purposes and some of them

were volunteer workers. There were no interviews with anyone who was forced to relocate as a result of famine, war or any other crisis.

Of course not all difficulties are cultural in nature, people who remain in their home country also experience difficulties. There are practical, emotional, physical, mental and spiritual difficulties that are normal to everyday life. There are, however, unique challenges that arise from living in a different country and these were emphasized in this dissertation.

1.3 THE RESEARCH PROCESS

1.3.1 My background

To give a clearer idea of the personal nature of my experiences, I will write in the first person in Chapter 1. In the remainder of this dissertation, the third person will be used.

As a child growing up in the Midwestern part of the United States of America (USA), I did not meet very many people from other countries or even people who are not white, Anglo-Saxon, Protestants (WASPs). I learnt German and Russian in high school and took my first overseas trip at the age of 17 to be an exchange student in Germany for one month. I again studied in Germany in 1989 for four months. From 1986 to 1989, I spent the summers travelling around Eastern and Western Europe and I was exposed to many different languages and people during this time.

In 1989, I joined an international Christian organisation, with members in more than 100 countries. Since my involvement with them I have travelled to 45 different countries and meet regularly with people from other parts of the world. In 1990, I moved to Budapest, Hungary. I did not know the language nor understand anything about Hungarians. I made many mistakes, but also learnt a lot, and adjusted fairly well. I spent the first six months in an intensive study of the Hungarian language. I was able to speak Hungarian quite well and then taught English part-time at a Hungarian school. I knew of a group of Americans working in Budapest who spent a lot of time with each other. I made a deliberate choice to develop friendships with Hungarians and not to spend a lot of time with other foreigners. I lived in Hungary for three years and during the last year and a half I began to help other foreigners

who came to Hungary to understand the Hungarian values, beliefs and customs on an informal basis.

In 1992, I married a South African and moved to South Africa. I read several books about South Africa, but I did not understand very much about its history. There are many groups of people living here, but I did not know much about the values and customs of the different groups. I arrived at the end of the apartheid era with many changes taking place. I observed what I could, asked many questions about the values and norms of the people living in South Africa, and learnt as I went along.

In 1994, the organization my husband and I worked for brought a group of 320 people from 31 different countries to work in South Africa for nine months. I was asked to give many of them orientation on life in South Africa and the people of South Africa. I personally learnt a lot as I prepared for these orientation sessions, and many people who attended the sessions told me how helpful they found the information that I had given them. I began to realize the value of knowing things about the various population groups living in a country as well as some practical information, such as shopping, driving, posting letters and parcels, paying television licences, etc.

Soon afterwards I started working as a cross-cultural consultant, which meant giving cultural training and orientation to high-level managers as well as to Christian workers, who relocated to work in South Africa. I gave them information about South Africa including: the history, population groups and their values, patterns in communication, practical day-to-day living advice, business values and practices, and information about personal adjustment when moving to a different country. I also gave similar training and orientation sessions to South Africans who were relocating to other countries. All five of the companies I worked for were based in the USA and the United Kingdom (UK). They contacted me via e-mail or telephone, gave me their clients' details and I provided the training. Each company gave me a copy of their cross-cultural training manual, which contained the information that they wanted me to cover in these training sessions with their clients. I enjoyed this work immensely and saw the benefits provided to the expatriates.

One thing that interested me was that the training manuals from the different companies were very similar and also that the information in the business sections of some of the manuals was

based on research conducted by the Dutch anthropologist Geert Hofstede between 1968 and 1972. There have been many technological developments in the world since the time of Hofstede's research, which have greatly changed the way in which international business is conducted. I was concerned that the information I was giving my clients might be outdated and no longer relevant. As there are so many expatriates moving to different countries at present, especially to South Africa, I decided that I wanted to develop my own materials to help expatriates when they relocate to another country.

I realized that I needed a deeper and stronger foundation regarding what the difficulties are for expatriates, as well as what helps them to adjust to their new socio-cultural environment. I looked for more recent research on this topic. A very well-known person in this field is Fons Trompenaars, who wrote a book about understanding cultural diversity in business in 1994 (see 1.4.1; 2.5.2). His material was helpful, but focused especially on business issues. I decided to do research myself on this topic so that I could better understand the broader issues that expatriates experience when they relocate to a different country. I realized at this point that it would be much more beneficial to do a structured study, rather than just to read books on this topic. I also decided that if I was going to take several years to research this topic, I would like to study formally through a university. I began this process in 2000.

1.3.2 Motivational relationships, books and conferences

When I first applied to work as a cross-cultural trainer in the mid-1990s, I read Geert Hofstede's book *Cultures and Organizations, Intercultural Cooperation and its Importance for Survival* (1994), which opened a whole new world for me. It helped me begin to understand some of the frustrations that I had been experiencing, which I was previously not even able to identify or describe. For example, Hofstede writes about different leadership styles and people's different expectations regarding what leaders are supposed to do. Reading this book immediately helped me to understand some of the difficulties I had experienced in leading a team made up of people from four different countries when I lived in Hungary. Another book, Fons Trompenaars' *Riding the Waves of Culture, Understanding Cultural Diversity in Business* (1994) also shed some light on the cultural dynamics that I had personally experienced, and proved helpful in my training sessions.

The cultural training programmes I conducted brought me into contact with other people who were involved in the field of cross-cultural training and consulting. An American colleague encouraged me to do research in Cultural Anthropology and also recommended that I join a group called the Society for Intercultural Education, Training and Research (SIETAR), which I did in 2000. SIETAR is an international professional association whose aim is to implement and promote the growth of knowledge and skills in the field of international and intercultural communication, organisations and policy. Members of SIETAR are professionals in the fields of education, business practice, training and consultancy.

In March 2000, I attended a SIETAR Europa congress in Belgium with the theme *Cultural Identity and Diversity in Building Europe*. I attended many helpful seminars and lectures from which I gained information that helped shape the questions in my research. Several of the people I met at the conference later became respondents.

In 2002, the SIETAR Europa congress was held in Austria, with the theme *Intercultural Competences in a Globalised World*. At this congress I presented a paper on the needs of expatriates. I also attended lectures and seminars given by other participants, especially on the themes of expatriate experiences and research. Professor Nigel Holden, a professor of Cross-Cultural Management at Copenhagen Business School and a renowned author, presented one especially thought-provoking seminar on the topic of research. He challenged the way that consultants and trainers in the field of cross-cultural diversity rely on Hofstede's research (see sections 1.4.1; 2.5.1) and the way the term 'culture' is used in this field. We discussed my research and I received helpful advice from him.

1.4 METHODOLOGY

1.4.1 Literature research

It was mentioned in Section 1.3.2 that the most influential book that I read in the 1990s was *Cultures and Organizations, Intercultural Cooperation and its Importance for Survival* (Hofstede 1994). Many problems that I personally had faced as an expatriate became clear as I read this book and I wished I had known these differences before I relocated.

In discussions with other expatriates about cultural differences, I heard about *Riding the Waves of Culture, Understanding Cultural Diversity in Business* (Trompenaars 1994). This book also helped me tremendously in understanding diversity. Trompenaars' examples were modern and the book helped me with understanding the problems that expatriates experience. I used his information to help formulate the questions I asked in my research.

At the SIETAR conference in Belgium (see 1.3.2) I became familiar with *When Cultures Collide: Managing Successfully Across Culture* (Lewis 1999a) and *Cross Cultural Communication: A Visual Approach* (Lewis 1999b). These books give helpful cultural information about specific countries, for example: business values, leadership styles, how time is viewed, appropriate behaviour at meetings, negotiations and communication patterns. These books are extremely helpful for expatriates working in different countries as well as people who travel for business purposes.

A Short Course in International Business Culture (Mitchell 2000) gives helpful information regarding the business practices in different countries as well as important things to know about *non-verbal communication*. This supplemented my knowledge regarding the dynamics of personal space in different cultures that I obtained from *The Hidden Dimension* (Hall 1966).

One of the most helpful concepts in formulating this research was found in the work of Wendy Hall (1995). She developed a cultural literacy model to help international companies work well together by making executives culturally literate, specifically dealing with how to live with, manage and minimize dissynergy from cultural differences. I took this principle taken from management literature and applied it to the expatriate moving into a different cultural domain. In order to be 'culturally literate', expatriates also need to be aware of the specific differences in values and appropriate ways of doing things and learning to live with and manage them.

Elizabeth Marx's book *Breaking Through Culture Shock* (1999) was extremely helpful in understanding issues that expatriates face in their adaptation process and helped me to formulate my questions regarding adaptation. I used a quote from her book to describe *culture shock* in my interviews. Four other books written to help expatriates in their relocation process were also very helpful in this regard: *Survival Kit for Overseas Living*

(Kohls 2001), *The Art of Crossing Cultures* (Storti 2001a), *The Expert Expatriate* (Hess & Linderman 2002) and *The Art of Coming Home* (Storti 2001b). These books all discuss anthropological issues of cultural contact. They contain information regarding challenges expatriates will deal with and they give advice to assist them in facing these challenges.

In order to understand the context of globalization, I looked for literature regarding expatriates, especially books written by anthropologists. *Modernity at Large: Cultural Dimensions of Globalization* (Appadurai 1996) provides a new framework for the cultural study of globalization (see 2.2.2). It was exceptionally useful in helping me to understand the context and impact of globalization and the movement of people. Literature by Zygmunt Bauman in *Globalization, The Human Consequences* (1998) and *Zygmunt Bauman, Prophet of Postmodernity* (Smith 1999) also gave useful information on modernity, post-modernity and the effect on people, relationships and identity.

My search of the *Annual Review of Anthropology* did not yield many articles relating to expatriates. One article, 'The local and the global: the anthropology of globalization and transnationalism' (Kearney 1995) helped in my understanding of the anthropological concept of globalization and global theory, but it did not address expatriates. Another article in *Current Anthropology* called 'The anthropology of the state in the age of globalization: close encounters of the deceptive kind' (Trouillot 2001) was helpful in understanding the anthropological view of globalization and the role of the nation state.

One of the most helpful books was *Global Culture/Individual Identity: Searching for Home in the Cultural Supermarket* (Mathews 2000). It contains a discussion on the use of the term 'culture' and provides a new perspective on cultural identity. Mathews gives an alternative to 'national identity' with his idea of 'market identity.' The debate in 'When: a conversation about culture' (Borofsky *et al* 2001) between Borofsky, Barth, Schweder, Rodseth and Stolzenberg in the *American Anthropologist* was also helpful in understanding the concept of 'culture'. It describes how the term has been used in the past, and how it is used today, and it also explains some of the controversy surrounding this term. Brumann's (1999) article in *Current Anthropology* on the debate about whether the term 'culture' should be abandoned or not was important for me to understand how this term has been used in the past, and in the present, and ideas for its use in the future. *Cross-Cultural Management: A Knowledge Management Perspective* (Holden 2002) was extremely helpful in broadening my

understanding of the history and complexity of the term ‘culture’, as well as the complex interactions between people in multi-cultural organizations.

One of the many helpful books on the value systems of people in specific countries or regions was *South Africa's 'Black' Market: How to Do Business with Africans* (Fadiman 2000). This book aims to teach Westerners how to use African methods when doing business with Africans and gave me valuable insight into African business culture. It also provides excellent information for expatriates coming to South Africa. *Into Africa: Intercultural Insights* (Richmond & Gestrin 1998) was extremely helpful for me in terms of understanding the African mindset. *Germany: Unraveling an Enigma* (Nees 2000) contains useful information for anyone working with Germans and for expatriates relocating to Germany. The *Lonely Planet* and *Culture Shock!* book series provide information such as maps, travel, things to do, etiquette etc for different countries and regions, for example *China* (Lonely Planet: Harper *et al* 2002) and *Culture Shock! South Africa* (Rissik 1994). Although I did not use these books directly for the purpose of this research, they assisted me in realizing what kinds of differences exist.

The Third Culture Kid Experience: Growing Up among Worlds (Pollock & Van Reken 1999) focuses on issues that expatriate children face. It contains crucial information for both expatriate parents and their children. In this book, an expatriate child is called a ‘Third Culture Kid’ (TCK) and is defined as someone who has spent a significant part of his/her childhood years in a different place than where his/her parents grew up. ‘*The TCK builds relationships to all of the cultures, while not having full ownership in any. Although elements from each culture are assimilated into the TCK's life experience, the sense of belonging is in relationship to others of similar background*’ (Pollock & Van Reken 1999:19). It gives information about maximizing the benefits and getting through the challenges for TCKs and gives practical advice for parents. I did not have the time to concentrate on children in this research, but I did ask expatriate parents to tell me about their children’s adjustment process; what was difficult and what helped them to adjust.

1.4.2 Field research

The field research that I have conducted was qualitative in nature. I have attempted to describe, interpret and critically assess the experiences of the expatriates whom I interviewed. Because I needed to interview people living in many countries around the world, the most time and cost-effective method was using e-mail. Some of the questions asked were dichotomous (yes/no) but most questions were open-ended. This gave the research participants the opportunity to answer the questions in their own words rather than forcing them to choose an answer that did not actually match their experience. The research participants shared many of their experiences and problems with me. I was able to statistically analyse the responses to some of the questions and these results have been included in this dissertation.

1.4.2.1 Selection criteria for the research participants

My criteria were to find research participants who: firstly, had previously or were presently living in a different country than where they grew up; secondly, people who could communicate in English; and thirdly, people who had lived for at least one year in a country other than where they grew up. I also tried to get as wide a distribution as possible, both people originating from many different countries, as well as those relocating to countries all around the world. Through my work and travels, as well as living as an expatriate myself, I knew many people who would qualify (see 1.3.1). Although it was not intentional, the research participants in general were from relatively affluent backgrounds. Most of them were business people who had relocated for business purposes, while others were missionaries and volunteer workers who had relocated to perform religious and humanitarian work.

1.4.2.2 Electronic interviews (EIs)

As I wanted to have a broad base of responses from people living in different countries around the world, my challenge was to find people who matched my criteria and who were willing to take time from their busy schedules to help me. It was obvious that the best way to get responses quickly from many people living all around the world would be to use e-mail as

a means of doing virtual interviews. This is a slight variation of snowball sampling or chain referral sampling in ethnographic research, where one member of a group refers the researcher to another member. This process is repeated until the researcher has enough members (see De Vos 1998:254). [Along with e-mail interviews (EIs), I also conducted face-to-face interviews (see 1.4.2.3).] These EIs were not e-mail questionnaires, where people ticked appropriate answers, but were virtual interviews where people shared many personal experiences with me.

The EIs comprised ten sets of interview questions. When I refer to a specific set of interview questions, the number of the interview set will follow EI. In EI-1, potential participants were asked for their basic information: name, where they grew up, which other country they had lived in and for what time period. I also asked the nature of their job, as I felt that could influence what issues they faced. I should have asked their age in EI-1, but I only realized that a few months later. I then added this question to EI-1 and for those research participants who had already responded to this set of questions, I asked them their age in EI-10.

Also in EI-1, the respondents were asked to list three problems of a cultural nature which they faced as a result of living in a different country. This helped me to design the next sets of interview questions. I had in mind general categories of questions I wanted to ask and the responses to this open-ended question helped to guide me. I wanted to be open to new issues I had not previously thought of, or to eliminate things I had thought of but which had not been listed by others.

Next in EI-1, the respondents were asked if they had received an introduction or a training course to help them understand the cultural values of the people in the country to which they were relocating. For the respondents who had, I asked how effective it was. For those who had not, I asked if they would have wanted a cultural training course. Lastly, I asked them if they would be willing to respond to approximately eight more interviews.

I sent out the first set of interview questions via e-mail to 35 people that I knew quite well, who matched my criteria, and whom I felt would reply fairly quickly. Each of the 35 people did respond by answering my first set of questions and 26 of them completed all of the interviews. Their answers were informative and gave me an indication that I was asking the questions in the right way. I then proceeded to send EIs to more people that I knew.

I asked mostly open-ended questions in my follow-up EIs in order to get comprehensive answers and not to limit the research participants' responses. As most of the respondents were very busy people, I wanted them to be able to answer the questions in five to ten minutes to motivate them to continue to participate. I believe that for the most part they did not need more than ten minutes to respond. Although I asked for short answers in each case, some people gave more lengthy responses. In most cases they seemed to know what was being asked, without needing much explanation as they had experience in adapting to life in a different country.

After receiving approximately 60 responses to EI-1, I compiled the questions for the next two EIs. I decided to investigate corporate/business issues first, i.e. differences that expatriates faced at work. As many cultural training programmes use Hofstede's research (see 1.4.1; 2.5.1) as a basis for their section on differences in the workplace, I asked questions on four of his main points. These four points were covered in EI-2 and EI-3 and the results will be analysed in Chapter 3.

Every few weeks I looked at the composition of the respondents, checking where people grew up and to where they had relocated. I could then see which areas in the world were well represented and which were not. This enabled me to concentrate on finding people from the geographical areas that were not well represented. I then wrote to specific people I knew or people I thought might know someone from those areas and asked them for contacts.

When I received each completed EI in Microsoft Outlook, I saved it in Microsoft Word format, which made it easier to use later, backed it up on a disk, recorded it in Microsoft Excel, sent a thank you note, and sent the next EI. This process took me an average of ten to 12 minutes per response.

Besides the dimensions written by Hofstede, I had other questions regarding differences in the workplace which I experienced myself as an expatriate, as well as issues that had arisen in my conversations with other expatriates. These questions were asked in EI-4. These results are also found in Chapter 3. At the end of EI-4, the respondents who were married were asked to indicate whether the adjustment was more difficult for them, as the one who was working, or for their non-working spouse. I had a strong suspicion about this result, which I wanted to confirm or reject (see 5.2.3.3).

EI-2 through EI-4 asked questions regarding workplace issues, and there was a sizeable attrition rate amongst non-working spouses. In order to get the spouses involved again, I carefully chose the next topic to interest the spouses and EI-5 through EI-7 covered issues dealing with *verbal* and *non-verbal communication*. These results are found in Chapter 4.

In EI-8, respondents were asked questions about the differences in the practical aspects, such as banking, shopping, the postal system, visas, transport, etc. They were asked which of these they found easiest to cope with and which they struggled with the most. It was impractical to include these findings in this dissertation because they contained information about 60 different countries of destination with comparisons to the countries they came from. Thus it was not possible to summarize or categorize, however the results contain valuable comparisons for future expatriates.

In EI-9, I asked the respondents to answer questions about *culture shock* and adaptation, both regarding themselves as well as their spouses and/or children. These questions were formulated from personal experiences as well as from literature (see Marx 1999; Hess & Lindermann 2002; Storti 2001a). I asked questions about what their main difficulties were, as well as what helped them to adapt to the new cultural milieu. These results are discussed in Chapter 5.

In EI-10, respondents were asked what main lesson they had learnt as a result of living in another cultural domain, what they had not done that they wished they had done, and what resources had helped them the most. If I did not yet know the age of the respondent, I also asked them for that information. The last question I asked was only for respondents who had moved to another country and then moved back home again. I wanted to know what was the most difficult thing about relocating back home and also which adjustment was more difficult: moving to the new country or moving back home again. These results are also found in Chapter 5.

I achieved my goal of 100 full sets of results by 31 October 2001. It was hard work, but very rewarding and interesting. I printed out every response to each questionnaire on hard copy, both as an extra back up and also to make it easier to analyse the results. I gave each research participant a pseudonym if I used their responses in this dissertation.

1.4.2.3 Personal interviews (PIs)

I travel quite extensively, visiting on average six to 12 countries each year. I often attend and speak at international conferences where there are many other expatriates and in my free time I took advantage of many opportunities to speak with expatriates living in many different parts of the world (see 1.3.1). I have, for instance, interviewed people at conferences in the USA, the UK and Italy; expatriates during a 2-hour bus journey in Korea; people in a restaurant in Bangkok, and others in their homes in Germany and the UK. The 25 interviews I conducted were of differing degrees, from formal interviews to informal discussions, depending on the people and the situation. The schedule of questions used in electronic interviews was used as a basis for the personal interviews and the selection criteria were the same for both electronic interviews as well as personal interviews (see 1.4.2.1). I have also met with many expatriates living in South Africa, as well as with South African expatriates visiting South Africa or who have relocated to South Africa. For the purpose of this dissertation, a face-to-face interview will be abbreviated as a 'PI', which stands for 'personal interview'.

In the more formal interviews, I explained what my research was about, I told the interviewees that I would keep their responses confidential, and in each case they gave me their informed consent to use their information, whilst protecting their identity. I brought a list of questions and I took notes. When I got home I typed them and saved them in Microsoft Word format. In compiling these expatriate life histories I considered their total expatriate experience and have attached one example of a life history (see Annexure A). I also gave each of these interviewees a pseudonym if I used their responses in this dissertation.

The research participants in this dissertation will generally be referred to as 'participants'. 'Interviewee' will be used to refer to someone with whom I had a face-to-face interview and 'respondent' will be used to refer to someone who responded to the questions that I sent to him/her via e-mail.

1.4.2.4 Analysis of the results

The results were analysed using the hard copies of each EI and transcriptions of the PIs. For most questions, I went through and made a long list of every response. I then looked through and grouped the answers until I found appropriate categories and assigned each one an alphabetical letter. Next I went through each of the responses, wrote the letter of the category beside it, and then counted the responses in each category. In many cases I made two separate compilations, one counting each response and the other calculating the percentages. Charts and graphs were then compiled to illustrate the results.

1.4.2.5 Motivating respondents to participate in electronic interviews

In the first group of questionnaires I sent out to the 35 people I knew living around the world (Group 1), I asked the potential respondents to either forward my EI to others, or to send me e-mail addresses of people they knew who were living, or had lived, in a different country to the one where they grew up. I received many referrals this way. Many respondents in Group 1 agreed to help me because they knew me.

The research participants who responded via referrals will be called Group 2. Many people commented on the usefulness of my study and said that they wished they had had more help in dealing with their own transition issues when they moved to another country. The usefulness of my study seemed to motivate people to help me, especially those who did not know me.

However, I still needed more participants. In many cases the respondents were business people who were very busy and had little time to fill out EIs. I needed to devise ways and means to keep the time required on their part to a minimum and yet to get the answers I needed. The attrition rate was high, as was expected. They were doing me a favour and getting nothing concrete in return. I did offer a summary of the results to the people who completed all of the EIs and about 50% of them asked for the results.

For my Group 3 participants I found a web site called *Delta Intercultural Academy* (DIA) at www.dialogin.com. DIA is a web site that requires membership and is for people interested

in the intercultural field. I joined the group and then posted a request for people to help me as participants, but I did not get any responses. I then contacted the moderator, who suggested that I go into the address book on the web site and contact people directly. This worked much better.

The group had approximately 250 members at that time and from their profiles I could see where they were from and where they were currently living. I chose people who matched my criteria and tried to find people from parts of the world where I had the least participants. I then sent them an e-mail explaining what I was doing, sent them EI-1 and asked if they would be willing to participate.

All of the Group 3 participants were familiar with cross-cultural issues and some of them were working as cross-cultural trainers. In all cases where the respondents were actually cross-cultural trainers, they had their own personal experiences of living in a different country before they became trainers. The responses that came from this group were especially helpful because many of them had previously thought about their experiences and had good examples to share.

I also asked Group 3 for referrals and I got several. Most of these people I had never met, but I had attended a conference in Belgium in 2000 and a few of the participants remembered meeting me there. Several of these people commented that this was an important study and were interested in the results.

Group 4 participants were selected from another web site. I joined a Yahoo group called *Intercultural Insights*, a web forum with ongoing discussions. In this group, people introduce a topic or question and others in the group respond. I explained about my research and asked for volunteers (who matched my criteria) who were willing to complete ten questionnaires, to respond to me via e-mail. I also got some referrals from this group.

The last group of participants, Group 5, were people whom I did not intentionally seek out but rather those whom I met along the way who met my criteria and agreed to help me. These were mostly expatriates living in my community, family members of South African friends who were home on a visit or referrals from friends and acquaintances.

Only after my research was completed, did I realize that it was a lot to ask people to respond to ten EIs, especially people who did not know me. Often people would not respond right away and I had to decide if it was better to wait for their response or to contact them. Often I would send the EI again with a personal note at the beginning, thanking them for their participation, asking them how they were doing or referring to something they had previously written. I worked very hard to keep the process going. The dropout rate was 41%, which I was very pleased with, as I had expected it to be higher.

1.4.2.6 Advantages of using electronic interviews

There were many advantages of using e-mail as a means of conducting virtual interviews. It was a quick and easy way to send out a large number of EIs to many people who were living very far from me, and to receive their responses. It took me approximately ten to 12 minutes to receive each response, record the information, print a hard copy, and send the next EI (see 1.4.2.2). As the responses were in written form, I could accurately record them, save them in Microsoft Word, and print them directly from my computer. It was relatively easy to add a personal note of thanks at the beginning of the EI. I believe this personal touch helped to motivate the research participants to respond to the EIs.

Although one cannot be 100% certain, I do not believe that the respondents lied in their responses. I avoided asking questions that were potentially embarrassing or too personal (for example regarding drinking excessive alcohol or questions about their religion) and rather tried to ascertain what was different, difficult or stressful, not identifying areas where they failed or were weak. I believe this helped them to be honest with their responses, and thus contributed to the accuracy and reliability of my data.

I was able to write the subsequent EIs after research participants responded to previous ones. This also allowed me to receive some input before writing the next EIs and I could ask questions later in the process that I had not thought of initially. Because I did not meet many of my respondents, I could remain objective in analysing their responses. It may also have saved me from having to spend much time advising them or encouraging those who were having a difficult time.

If certain answers were not clear, or I wanted more information, it was possible to write a quick e-mail to ask the respondents to clarify something. This occurred on about ten occasions.

I did not have to set up meetings or travel to meet people. I could work from the comfort of my home or I could download responses on my laptop from other locations when I was travelling. I did not have to dress neatly, carry recording equipment or arrange a venue. I could also work whenever it suited me, even late at night or very early in the morning. It is difficult to calculate the actual cost of being on-line to send the EIs and to receive the responses, but an estimate of the total telephone charges for the purpose of this research is approximately R1 200.

1.4.2.7 Disadvantages of using electronic interviews

Not meeting many of the research participants face-to-face was also a disadvantage. I had less opportunity to further address something that they said or that I discerned from reading their *non-verbal* cues. For example, if someone said that what helped them to adjust to life in the new country was 'friends', I would have asked them in what ways their friends helped them to adjust. It was sometimes difficult to motivate respondents to continue answering my EIs. The personal aspect of face-to-face communication can be a motivating factor. The respondents also had less opportunity to clarify a question that I had asked. There was, however, only one question in all of the EIs that some respondents had difficulty understanding (see 4.3.8).

All of the questions were written in English, and with the exception of one participant who answered in German, all of the responses were also in English. This limited the people who could participate, as well as how well they could express themselves, if they were not fluent in English.

1.4.2.8 Research ethics

A statement of confidentiality was e-mailed to each research participant, along with EI-1, agreeing to keep their responses confidential (see Annexure B). In face-to-face interviews, I stated to the interviewees that I would keep their responses confidential. They read and signed a consent form (see Annexure C). As I wrote this dissertation, I provided each respondent with a pseudonym, coded in a way that only I would know who they were. This aided me in keeping track of who made which statements. I have used the pseudonyms in this dissertation to protect each research participant's identity.

CHAPTER 2

CULTURAL FACTORS IN A GLOBALIZING WORLD

2.1 INTRODUCTION

Throughout human history, people have lived together in communities. Until recent times some of these groups of people were quite distinct and isolated; most of them spoke their own language, and had their own belief systems, rituals and ways of doing things. With minimal contact, there was little need for information and understanding between the different groups.

Over the centuries, however, contact between people living in different places has increased and there has been exponential growth in these interactions in the past 50 to 100 years. The 21st century world has been referred to as a ‘global village’ (see McLuhan & Powers 1989). In this globalizing world, people still live together in communities, but these communities look much different than they did in the past. Especially with people being more mobile today, these communities are less homogeneous than they were before. An important implication of this phenomenon is that in order for people today to understand and socialize with each other, as well as for international business endeavours to succeed, there is a need for the awareness of different cultural values and appropriate ways of doing things.

This chapter will give the theoretical background for the research conducted for this dissertation. The focus of this study is on the cultural dimensions involved in an expatriate’s relocation episode. This necessitates an understanding of the nature and extent of the globalization process, as it is important to see the context in which cultural exchanges are presently taking place. Relevant terminology will be discussed and defined. Lastly, as most of the research participants in this study chose to relocate for business purposes, existing cultural models in international business will be investigated.

2.2 GLOBALIZATION

In the 16th and 17th centuries communities began to form into nation-states with national territories. Many if not most people have lived their lives within the context of the nation into

which they were born and most of their day-to-day interactions have been with people from their local community or nearby communities.

Many historians have identified globalization as a 20th century phenomenon; however, large-scale interaction between widespread human groups has existed for many centuries, especially as a result of trade and colonization. *'Globalization refers to the intensification of global interconnectedness, suggesting a world full of movement and mixture, contact and linkages, and persistent cultural interaction and exchange'* (Inda & Rosaldo 2002:2). Put in a different way, globalization refers to *'the intensification of world-wide social relations which link distant localities in such a way that local happenings are shaped by events occurring many miles away and vice versa'* (Giddens 1990:64).

According to Waters (1995:2): *'Although the word "global" is over 400 years old (OED 1989, s.v. global) the common usage of such words as "globalization", "globalize" and "globalizing" did not begin until about 1960'*. Indeed the effect of the movement of people, information and finance in the past century, make this world a very different place from the world of 100 years ago.

Robertson (1992:8) uses the term 'globalization' to refer to, *'the compression of the world and the intensification of consciousness of the world as a whole'*. This gives one the mental picture of the world as a 'global village'. Waters defines globalization as: *'A social process in which the constraints of geography on economic, political, social and cultural arrangements recede, in which people become increasingly aware that they are receding and in which people act accordingly'* (Waters 1995:5).

2.2.1 Globalization in the past

There are numerous examples of past cultural contact via trade, of which just a few will be mentioned. From around 200 BC to AD 1000, the Silk Road, a trade route in Central Asia linking China to Imperial Rome, fostered the spread of cultures, religions and technologies (see Wild 1992). Between 1000 and 1500, the seagoing trade network on the Indian Ocean increased and eventually surpassed overland trade. After 1500, the European countries also entered into the Asian trade market extending the route around the African continent (see

Lyman 2002). In earlier centuries, most traders and merchants travelled back and forth between their home and where they purchased and sold their goods. Contact with people from different societies was fairly brief and mostly for the purpose of doing business.

Colonization was another way that different cultural groups had contact with each other. The Greeks and the Romans led conquests, as did the Vikings, Mongols, Ottomans and Christian Crusaders. Over the past 500 years, the British, French, Spanish and Portuguese colonized many countries. In most cases, the colonizers lived a superior lifestyle and did not 'mix' with the locals (see Goucher *et al* 1998:578-782).

These conquests went hand in hand with the *Siècle De Lumières*, or the Age of Enlightenment, a term used to describe an intellectual movement in the 17th and 18th centuries. The Enlightenment took place in the 'first world' countries, mainly Europe and North America. According to Harvey (1990:13) the Enlightenment sought to '*laud human creativity, scientific discovery and the pursuit of individual excellence in the name of human progress*'. He further explains that during the Enlightenment, people took for granted that there was only one possible answer to any question. From this it followed that the world could be controlled and rationally ordered if only people could picture and represent it rightly. This opened the way for totalitarian alternatives of fascism, communism and consumerism. The 'Enlightened' also felt a need to bring their 'benevolent progress' to 'backward' parts of the world that needed help (see Harvey 1990:27).

Around this same time, in the 18th and 19th centuries, the Industrial Revolution took place and began what has come to be known as the modern age. According to Zygmunt Bauman (see Smith 1999:7), three powerful forces came into play in the modern age, namely: the rise of the modern nation-state; modern science, which developed tools that could manipulate the natural world; and capitalism, with its pursuit of profit.

The hope of the modernistic world was that all of the problems of the world would be solved through science and truth. In the beginning, it was successful and attractive, and taking control through science appeared to be the answer to the chaos of the world. But we need only to look at historical events like World War II, the Holocaust and the dropping of nuclear bombs to see that science and reasoning can not only bring about the advancement and betterment of the world, but also its destruction. The rise of modernism was focused around

the rise of 'reason' which in turn has opened the door to Western senses of superiority (see Adas 1989).

In recent decades a shift towards postmodernism, a reaction to the rationalism, individualism and instrumentalism of modernity, has been taking place. It seems that at present, the nation-states are losing some power and control as the primary shapers of people's thoughts and ideas. The focus on individualism and 'self' is invading parts of the world in which community and 'the other' has previously been the focus. The postmodern world, according to Bauman, is a '*world of rootless strangers, a world in which men and women try to survive and create meaning by drawing on whatever personal resources they happen to have*' (Smith 1999:17).

According to Lötter (1995:47), the postmodern world '*recognizes the legitimacy of multiplicity; it brings a new attitude towards openness; it puts an emphasis on plurality; and it permits different readings with contradictory implications*'. These ideas have helped many people to see that there are different ways to see the world; there are other legitimate value systems; and there are many ways to do the same thing. Expatriates today are beginning to recognize the way the locals do things rather than oppressing the locals as many early colonists did.

2.2.2 Globalization in the 20th and 21st centuries

The nation-state was previously able to control what flowed into and out of its borders. This is no longer the case, with rare exceptions like North Korea. There are many things and ideas that move around the world, disregarding the man-made national borders. Appadurai (1996:33-37) proposes a framework for five dimensions of global cultural flows. He uses the suffix *-scape* to bring attention to the fact that these landscapes are fluid and irregular. He has coined these terms: (a) *ethnoscapes*, (b) *technoscapes*, (c) *financescapes*, (d) *mediascapes* and (e) *ideoscapes*.

- *Ethnoscapes* refer to the people who constitute the shifting world: tourists, immigrants, refugees, exiles, guest workers and other moving groups.
- *Technoscapes* refer to mechanical and informational technologies, which now move at high speeds across various kinds of previously impervious boundaries.

- *Financescapes* refer to the movement of global capital, as currency markets, national stock exchanges and commodity speculations move money through national turnstiles at blinding speed.
- *Mediascapes* refer to the ability to produce and disseminate information (newspapers, magazines, television stations and film-production studies) throughout the world.
- *Ideoscapes* are images that are often political and frequently have to do with the ideologies of states and the counter-ideologies of movements explicitly oriented to capturing state power or a piece of it.

To the above may be added *sacriscapes* to describe the spread of religion, and *leisurescapes* for the spread of popular culture (see Condry 2002:384) as two other dimensions of global cultural flow.

Appadurai's model of global cultural flows show that people, machinery, money, images and ideas now follow different and varying paths, and the sheer speed, scale and volume of each of these flows are now so great, that they have become central to the politics of global culture. Attention will now be given to the global movement of information, finance, people and popular culture, as these affect the daily lives of expatriates.

2.2.2.1 The global movement of information and finance

It has been said that the media create communities with 'no sense of place' (see Meyrowitz 1985). Today we receive news from all over the world, not just in text form or read from a script by a newsreader, but live video of the event actually happening. Many Americans around the world watched in horror on September 11, 2001 as the World Trade Center was destroyed before their eyes. '*Koreans in Philadelphia watch the 1988 Olympics in Seoul through satellite feeds from Korea, and as Pakistani cabdrivers in Chicago listen to cassettes of sermons recorded in mosques in Pakistan or Iran, we see moving images meet deterritorialized viewers*' (Appadurai 1996:4). Hollywood movies, MTV and books have influenced the lives of many people, carrying with them ideas and values that may be different to what they are exposed to at home.

Capitalism has become global, and companies easily conduct business across national borders. The ease of information exchange has also ensured that physical proximity is not essential to run organizations (see Lipnack & Stamps 1997; Wallace 2004).

2.2.2.2 The global movement of people

There are people who remain at home, those who travel to visit other places, and those who relocate to other countries. Each of these three groups of people is affected by globalization, either by first-hand experience in a different cultural domain or by contact with foreigners in their own home country.

The globalization process has significantly affected relationships between people. One hundred years ago, most people had more time to spend together. Neighbours chatted over the fence or sat together on the porch in the evenings. Many people lived in the same neighbourhood all their lives and had known each other for many years. Relationships were often long and deep. In this new globalized world, people are much more mobile. Many people move away from their extended families and do not stay many years in one place. People are now busier than ever before and their busyness does not allow for many over-the-fence chats. Their neighbours are strangers. In fact, as Bauman says, '*In the postmodern habitat everyone is a stranger to most of the people he or she meets*' (Smith 1999:161). Many global travellers now have more in common with travellers from other countries than they do with their own neighbours.

Over the past 50 years, more than any other time in history, people have not only travelled to other countries, but have also relocated to different parts of the world. This has happened for many reasons. Many people have been dislocated as a result of war, poverty and famine. Some live in other places to earn a living to provide for their families, who may or may not have come with them; some move to study and for educational reasons; some move in search of work and opportunity because their living conditions are intolerable; and others move in search of power, wealth and experience, or to climb the corporate ladder. Still others move for humanitarian or religious reasons. These global movements of people have contributed greatly to the present situation where people from different countries are mixing with others and therefore there is a need for new levels of cultural understanding. The focus of this

research will be on a specific category of this *ethnoscape*, namely, the people who relocate to a different country.

What appears as globalization and a new freedom for some, means localization and a constraining fate for others. *‘Mobility climbs to the rank of the uppermost among the coveted values – and the freedom to move, perpetually a scarce and unequally distributed commodity, fast becomes the main stratifying factor of our late-modern or postmodern times’* (Bauman 1998:2). In most places, the ability to travel is a status symbol. Actually, in today’s world of constant and permanent change, we are all on the move in one way or another. In the post-space-war world, *‘mobility has become the most powerful and most coveted stratifying factor: the stuff of which the new, increasingly world-wide, social, political, economic and cultural hierarchies are daily built and rebuilt’* (Bauman 1998:9). Expatriates and global travellers experience the world, while the poor and disadvantaged have no choice but to stay imprisoned in their localities. *‘The punishment for poverty is to remain one of the “locals” – to suffer “ascription to meaninglessness”’* (Smith 1999:156).

2.2.2.3 The global movement of popular culture

A current point of debate is whether or not globalization is causing homogenisation in the world today. Especially with Hollywood movies and MTV becoming popular in most places, the question is whether the world is becoming Americanized or at least westernized. Certainly the spread of the *leisureescapes* of pop culture has reached around the globe, but it is debatable whether or not people’s values are actually changing. Globalization actually implies and necessitates localization. Residents of a local area want to decide together which community values they want to stress in the midst of all the global products available. *‘Localization implies a reflexive reconstruction of community in the face of the dehumanising implications of rationalizing and commodifying’* (Waters 1995:5). These local areas are part of the new *cultural domain* where the expatriate lives. With the influx of the new ideas that ‘the West’ or the expatriate brings, there can be competition for who decides how things are done.

Sometimes the imported commodities create what looks like homogenisation on the surface level, but underneath local values have not actually changed. An example comes from

Condry, who writes about the spread of hip-hop music in Japan. Hip-hop began in New York City as a form of street art in the late 1970s and came to Japan in the 1980s. There are many similarities between hip-hop in New York and hip-hop in Tokyo, but there are also distinct differences. This is an example of *'how global pop culture forms are leading not to some simple homogenisation, but rather adding to a complex mix that in many ways can only be studied ethnographically through extended research in local sites'* (Condry 2002:384). He refers to this as 'genba globalism'. 'Genba' is a Japanese word made up of two characters, 'to appear' and 'place', thus describing the place where something actually happens (Condry 2002:386). In the case of hip-hop, what looks very similar on a surface level, namely, clothes, hairstyles and music, can have different meanings in different social contexts. In this dissertation, cultural dimensions experienced by expatriates at their *genba* sites will be identified.

2.2.3 Globalization's effect on the concept of 'culture'

The term 'culture' has been used in many different contexts over the past 150 years. Many of these different meanings are still used today, which adds to the controversy surrounding this term. In 1860 Matthew Arnold (1938) used the term 'culture' to refer to special intellectual or artistic endeavours or products, similar today to what we would call 'high culture'. Using Arnold's definition, only a small portion of any given social group would 'have culture'. Remnants of this idea remain in use, for example, a person is considered 'cultured' or highbrow if he/she attends the opera and can comment knowingly about art and literature.

In the late 19th century, Edward Burnett Tylor and Lewis Henry Morgan pioneered another use of the word 'culture' and were also given credit for founding the science of anthropology. Tylor's definition of culture is *'that complex whole which includes knowledge, belief, art, morals, law, custom, and any other capabilities and habits acquired by man as a member of society'* (1958:1). Tylor's usage referred to a quality possessed by people in every social group as arrayed on an evolutionary continuum from 'savagery' through 'barbarism' to 'civilization'. Anthropologists later rejected the evolutionary element of Tylor's definition, but the idea that culture could be understood as a whole, integrated system became widely accepted.

In the 20th century, Franz Boas and his students further developed Tylor's ideas. Whereas the evolutionists stressed the universal character of culture, Boas emphasized the uniqueness of different cultures or societies. Moreover, he dismissed the value judgments in the previous views of culture, alleging that societies were neither high nor low, neither savage nor civilized. Boas argued for the moral equivalence of cultures and this was even more developed in the writings of his students, Ruth Benedict, Melville Herskovits and Margaret Mead. Although anthropologists differed in their theories, they shared the idea that the world was made up of 'peoples' who each had a coherent way of life, or 'culture'. This is the view that has been popular during the 20th century (see Kuper 2003:60-62, 240-242).

Kroeber and Kluckhohn (1952:181) wrote that:

'Culture consists of patterns, explicit and implicit of and for behaviour acquired and transmitted by symbols, constituting the distinctive achievements of human groups, including their embodiments in artefacts: the essential core of culture consists of traditional (i.e., historically derived and selected) ideas and especially their attached values; culture systems may, on the one hand, be considered as products of action; on the other, as conditioning elements of future action.'

Their concept of culture represents the essentialist view of culture, which is that the members of a cultural system share a set of values and ideas, which are transmitted from one generation to another through symbols. Culture is therefore produced by the past actions of a group and it shapes the behaviour and influences the worldviews of the future generations.

These essentialist ideas about culture are still in widespread use. The main features of this 'old' idea of culture are:

- that it is a bounded, small scale entity;
- with defined characteristics (checklist);
- unchanging, i.e. in balanced equilibrium or self-reproducing;
- built on an underlying system of shared meanings: 'authentic culture'; and
- made up of identical, homogeneous individuals

(see Wright 1998:9).

In everyday life, the essentialist view of culture has two useful features. One is for parents in dealing with children: culture helps keep them on the straight-and-narrow. '*Do as your*

culture says...or you are a bad member or no member at all' (Baumann 1999:84). Secondly, in dealing with strangers, it allows people to stereotype and predict behaviour about what someone else may do next. However, the problem is that people do not have one single identity, but rather multidimensional identities (see Baumann 1999:84).

According to Mathews (2000:1), anthropologists have traditionally defined culture as 'the way of life of a people'. This allowed people to speak of 'Navaho culture', 'American culture' and 'Chinese culture'. He questions whether such labels make any sense, as there is no, for example, 'American culture' that defines all Americans as opposed to non-Americans. In recent years many anthropologists have been hesitant to use the term 'culture'. Kuper (2003:226) writes that *'these days, anthropologists get remarkably nervous when they discuss culture'*. One reason for this is that *'in today's world of massive global flows of people, capital, and ideas, a "culture" can't easily be thought of as something that people in a certain place have, or are, in common, as opposed to other peoples elsewhere'* (Mathews 2000:3).

The concept of 'identity' has also been affected by the globalization process. Anthropologist Terrence Turner asserts that the concept of culture is becoming merged with that of ethnic identity. From an anthropological standpoint, this poses both theoretical and practical dangers: the idea of culture can be essentialized as the property of an ethnic group; by emphasizing boundedness and distinctness it risks reifying cultures as separate entities; and *'it risks overemphasizing the internal homogeneity of cultures in terms that potentially legitimise repressive demands for communal conformity'* (Turner 1993:411-12). National and ethnic components are still a part of most people's multidimensional identity in this globalized world. Identity is a complex issue, and as it only played a small part in this research, it will only briefly be mentioned in this chapter. The topic of this research also does not deal with the study of ethnicity so it will not be addressed in this dissertation (see Wolf 1994:6-7).

National identity was, however, used as a marker of cultural identity in the interview questions for this dissertation. Scholars argue about the future relevance of national cultural identity. Smith (1991:176) asserts that national identity *'is likely to continue to command humanity's allegiances for a long time to come'* and Hannerz writes that *'there are now various kinds of people for whom the nation works less well as a source of cultural resonance'* (Hannerz 1996:88). Appadurai (1996:15, 20, 158, 188-190) argues that

nationalism today is profoundly receding before a range of post-national, de-centered identities and social forms. Mathews believes that the national identity will exist for the foreseeable future for lack of an alternative (see Mathews 2000:184).

Hofstede points out that one's nationality is only one possible layer of culture. He states that in research on cultural differences, one's nationality, or the passport one holds, should be used with care. '*Yet it is often the only feasible criterion for classification*' (Hofstede 1994:12). He recognizes that people everywhere belong to several different social groups and categories at the same time and lists six common levels:

- a national level, according to one's country;
 - a regional, ethnic, religious and linguistic affiliation level, as most nations are composed of culturally different groups;
 - a gender level, male and female;
 - a generation level, separating grandparents, parents and children;
 - a social class level; and
 - an organizational or corporate level for those who are employed
- (see Hofstede 1994:10).

Corporate culture will not be specifically addressed in this research, but it is the way in which attitudes are expressed within a certain company or organization (see Handy 1993:180-216; Trompenaars 1994:138-163). It is important to note that corporate cultures may vary among different companies within the same country (compare Apple and IBM in the USA, or Sony and Mitsubishi in Japan); however, national business styles can be markedly more diverse (see Lewis 1999a:3).

A more recent perspective of culture is referred to as 'processual'. In this view, as compared to the essentialist view, culture '*is not so much a photocopy machine as a concert, or indeed a historically improvised jam session. It only exists in the act of being performed, and it can never stand still or repeat itself without changing its meaning*' (Baumann 1999:26). Culture is created in the *process* of life.

It would be convenient if we could see cultural groups as distinct, coloured puzzle pieces, or even as the different countries that appear on a map of Europe, but that is not the case. As

Hannerz has written, '*Human kind has...bid farewell to that world which could...be seen as a cultural mosaic, of separate pieces with hard, well-defined edges. Cultural connections increasingly reach across the world*' (1997:107).

Turner believes that good and bad uses of the terms 'culture' and 'multiculturalism' are based upon whether they connote the essentialist view of culture. The improper use of multiculturalism '*removes cultural phenomena from their social, political, and economic flexibility, it freezes them into stable, usually ethnic traits; and it thus fetishizes all so-called boundaries*' (Baumann 1999:88; see Turner 1993:411-429).

One of the main reasons why the essentialist view of culture cannot be disregarded entirely, however, is because so many people use the term in that way and it is repeated in predictable contexts. '*We fight wars and watch Olympic games as nationals, we fight discrimination as ethnics and contest moral issues as members of religious, or antireligious, communities*' (Baumann 1999:86). Baumann proposes that these two theories of culture should rather be regarded as two discourses of and about culture. By discourse he means both speech and social action. By calling them discourses of culture, he proposes that justice can be done to both the essentialist (partial) and the processual (comprehensive) views (see Baumann 1999:93).

Anthropology is changing as a result of the disciplinary developments made in the field and although the essentialist view of culture is no longer widely accepted in anthropology, some other disciplines still use it. The international business models discussed in Section 2.5 were developed during the past century when the essentialist view of culture was still used. Non-academics still commonly hold the essentialist view of culture. In this research, the researcher purposely implied the older definition in some of the questions used with the research participants. Interestingly enough, none of them mentioned or challenged this.

The paradox is that both the essentialist and the processual views of culture have validity. They seem to be contradictory, but that is one of the realities of a globalized world, that ideas do not always fit nicely into neat little boxes. One must be careful not to evoke '*a deceiving image of globalization processes as free flows for all on a worldwide scale, or stubbornly clinging to bounded units that were, to a large extent, imaginary all along*' (Meyer & Geschiere 1999:3). It need not be an 'either-or' situation, but can rather be a 'both-and'

situation. The term 'culture' is very complex and needs to be understood and accepted as such.

Brumann reminds us that culture is not the same thing as ethnicity and identity. *'We really should be careful not to say "culture" when we mean "society," "group," "tribe," or some other social and/or territorial unit. Culture is the socially acquired patterns within what people think, feel, and do, not the people themselves'* (Brumann 1999:S23). He believes that the term 'culture' is helpful as a general analytical tool, and the size and self-awareness of the clusters are not important, as social sharing can arise with any degree of these variables. *'This surely makes culture a very encompassing term, and we should strive to be more precise when possible but still, all of this social sharing is of interest to us, and there are, as outlined, occasions when we need to refer to it and to the clusters thereby created'* (Brumann 1999:S24).

Appadurai proposes getting around the dilemma regarding the term 'culture' by avoiding its use as a noun, but rather using the adjectival form of the word, that is, 'cultural'. The noun can connote that culture is an object, thing or substance, whereas the adjective *'moves one into a realm of differences, contrasts and comparisons that is more helpful'* (Appadurai 1996:12). At the beginning of this study, the researcher held the essentialist view of culture. In the process she has adapted a more processual view of the term. People are an environmental factor in other people's lives, and they incorporate ideas, values and sets of appropriate behaviour and can be found in specific geographic areas. These ideas, values and actions allow for a certain degree of non-conformism, but eventually living together forces the individual to recognize and conform to the broad range of actions that are considered appropriate by local people. A fair degree of deviation is allowed, but some conformity is expected of outsiders. In this research, the terms 'cultural domain' and 'cultural milieu' will be used to refer to the social environment in which a particular set of beliefs, ideas, values and behavioural patterns are considered to be appropriate. However, when describing answers from research participants and ideas expressed by other authors (see 2.5.1; 2.5.2), the term 'culture' will appear in the way that the participants and authors have used it.

2.3 THE EXPATRIATE EPISODE

The term 'expatriate' in this dissertation is defined as '*anyone who is living outside of his or her home country, either on a permanent or temporary basis*' (Hess & Linderman 2002:xv). There is no negative connotation associated with this term, nor is it to be confused with patriotism, namely, being proud of one's country. The expatriate 'episode' is the period of time from when the expatriate-to-be is considering relocating to another country until s/he relocates back to his/her home country. The concept of the expatriate episode will be used in the same sense that medical doctors and psychologists use the concept illness/disease episode (see Kleinman 1980:72 *et seq.*).

Expatriates today have many advantages over the expatriates of 50 years ago. As transportation is cheaper and faster, they can visit home more easily than in the past. News from home is also available to them via television and the Internet. Very importantly to most expatriates, they are able to communicate easily and quickly with their loved ones via e-mail and telephones, easing the pain of being separated. With these recent inventions, '*we have entered into an altogether new condition of neighbourliness, even with those most distant from ourselves*' (Appadurai 1996:29). It has never been easier either to keep in contact with people from home or to ignore them on purpose.

Expatriates today also have a particular challenge that was true in the past as well. When they move to a different country, they enter into a new socio-cultural domain to live, work, shop, etc. In general, expatriates today engage with the local people more than in past centuries and expatriates need to decide for themselves to what extent they want to engage with people in their new domain. There is obviously a need for them to understand their own values and behaviours, as well as the ways of the people where they live and work.

Children learn traditions and customs by growing up in a particular society (see Kottak 2000:4). Many of these beliefs and behaviours are taken for granted and can be difficult to identify or explain, as they are 'just the way things are done'. It is often only when confronted with someone from a different cultural domain that one recognizes these differences. Expatriates need information on cultural differences to help them to be successful in their new *domain*.

2.4 THE NECESSITY OF UNDERSTANDING DIFFERENCES BETWEEN CULTURAL DOMAINS

One clear fact of globalization is that there are now many more international business relationships. There are corporate partnerships, alliances, mergers, acquisitions and outsourcing that cause businesses and individuals to work together with people from different cultural domains. Many of these relationships fail due to unresolved cultural problems, which cause confusion and misunderstandings (see Hall 1995:5-6). Hall writes that '*cultural differences are important enough to ruin a partnership which otherwise makes perfect economic sense*' (1995:21) and proposes a six-step model for developing what she calls cultural literacy:

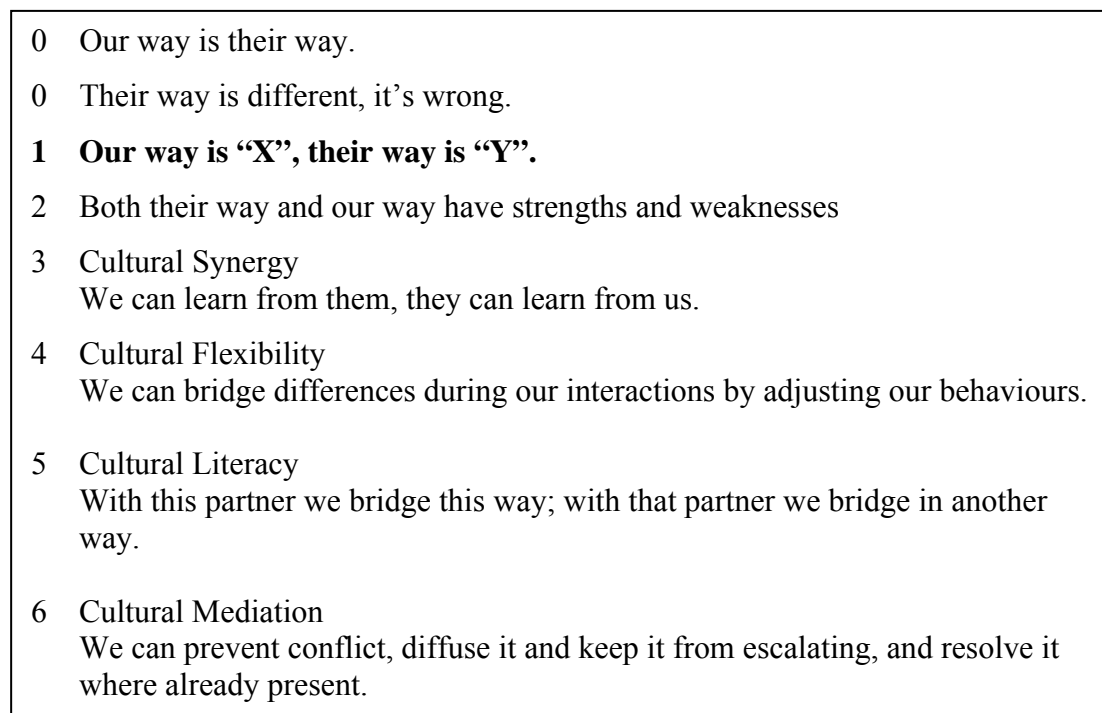


Figure 2.1 Path to cultural literacy (Hall 1995:43)

The starting points are indicated by a '0' in Figure 2.1. The first wrong assumption is that both partners do things in the same way. This is usually an honest lack of awareness. The second wrong starting point is when partners are aware of differences, but they make a judgemental interpretation that their way is better than the other way. According to Hall (1995:44), '*the first step on the path toward cultural literacy is gaining objectivity*' and starting from a neutral position. Her model continues to explain how companies can work together effectively in spite of their cultural differences.

The researcher realized that this model for companies from different cultural domains could be simplified and adapted to use as a point of departure for the relationship between the expatriate and his/her new *cultural domain* (see Figure 2.2).

- | | |
|---|--|
| 0 | My way is their way. |
| 0 | Their way is different, it's wrong. |
| 1 | My way is "X", their way is "Y". |
| 2 | I can adjust my behaviour to bridge the differences. |

Figure 2.2 Adaptation of Hall's Figure 2.1

It is also important for expatriates to develop cultural literacy and to be aware of their wrong starting points. The first one is that the people in their new *cultural domain* will do things the same way that the expatriates do them. Secondly, they may be aware of differences, but have a judgmental or superior attitude towards the other people. It is an important first step to recognize the differences but without judgment. This is a vital step in the success of the expatriate episode and one of the main foci of this dissertation. It is when these differences are recognized from a neutral position that expatriates can more effectively adjust to their new *cultural domain*.

2.5 CULTURAL DIMENSIONS AND MODELS IN INTERNATIONAL BUSINESS

The growth in international business has brought to the fore differing value systems and codes of conduct. Cultural differences sometimes result in problems, conflicts and misunderstandings. Hoecklin warns that if cultural differences are not properly handled, they can lead to '*management frustration, costly misunderstandings, and even business failures*' as quoted by Holden (2002:4).

There are cultural differences in the workplace that need to be considered for people working in an international setting. Companies sending their top managers and executives to live in other countries make a huge financial investment and they want the managers to be successful. Many companies now require their employees, especially high-level managers and directors, to go through a cultural training programme (see Hofstede 1994:232, 239).

These programmes are designed to sensitise expatriates to their own personal values and preferences and to help them understand the cultural values of the people they will be working with. As many of the expatriates involved in this study moved to other countries as a result of business opportunities, some cultural business models will be explained in this section.

According to Holden (2002:21), there are three works on culture and management on an international level, which have been very influential, namely: Adler's *International Dimensions of Organizational Behavior* (1991); Hofstede's *Culture's Consequences* (1980); and Trompenaars' *Riding the Waves of Culture* (1994). As Hofstede and Trompenaars' models are used extensively in cross-cultural training programmes for expatriate managers, they formed the basis for many of the questions regarding the workplace used in the interviews for this research.

2.5.1 Hofstede's model

Geert Hofstede, a Dutch anthropologist, conducted research with IBM employees in 72 countries. His research was done between 1968 and 1972 and he used more than 116 000 questionnaires. His research was done with employees from the same organization located in many countries and he attributed the differences he found to differences in national values.

At the time of his research, most Western anthropologists were using an essentialist understanding of culture (see 2.2.3). Hofstede's own definition of culture is '*the collective programming of the mind which distinguishes the members of one group or category of people from another*' (1994:5). From his research, he developed a framework that illustrates four major issues regarding how people process information and interact with people, namely, *power distance*, *uncertainty avoidance*, *individualism* versus *collectivism* and *masculinity* versus *femininity*. These four dimensions will now be briefly described.

2.5.1.1 Power distance: cultural differences in authority structures and expectations

Hofstede defines *power distance* (PD) as '*the extent to which the less powerful members of institutions and organizations within a country expect and accept that power is distributed*

unequally' (1994:262). This is a continuum between more authoritarian and autocratic leadership styles on the one hand and more egalitarian styles on the other side. In Figure 2.3, lower PD is shown by a 'flatter' authority structure, with a smaller distance between the person in authority and the subordinates. Higher PD shows a greater distance between the person in authority and the subordinates.

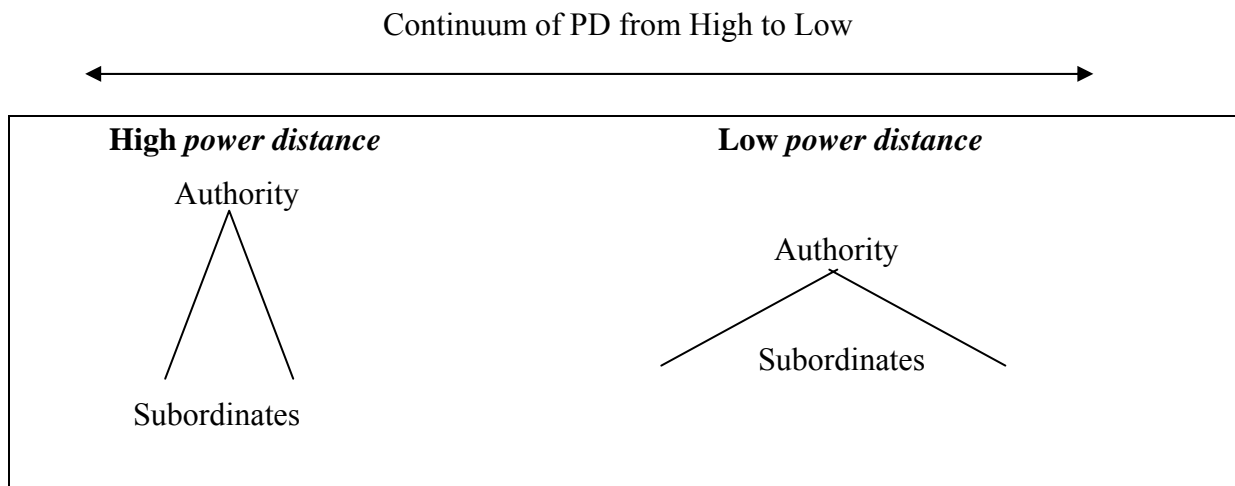


Figure 2.3 Continuum of *power distance* (PD)

PD not only describes how people view authority structures but also subsequently their expectations in decision-making. In countries with a lower PD profile, workers expect a larger role in decision-making and may question decisions if they are not consulted. In general they may also take more initiative and responsibility. In higher PD countries, workers expect the manager to make decisions and tell them what to do. They neither expect nor desire to be consulted. They tend to accept the manager's decision because s/he is the authority figure, and they also take less initiative and responsibility. According to Hofstede's research, the USA is an example of a lower PD country, whereas Russia is an example of a country whose people value higher PD.

2.5.1.2 Uncertainty avoidance: feeling threatened by the unknown

Uncertainty avoidance (UA) is defined as '*the extent to which members of a culture feel threatened by uncertain or unknown situations*' (Hofstede 1994:263). This includes whether people are comfortable taking risks and entering into new situations, or whether they avoid new situations and risks. The results show a continuum. High UA means people tend to

avoid uncertainty more strongly and are less likely to take unfamiliar risks. Low UA means that they are more comfortable with uncertainty and therefore are more willing to take unfamiliar risks.

UA measures a society's ability to tolerate ambiguity and uncertainty. Companies and organizations in higher UA cultures tend to have many rules to dictate behaviour and avoid uncertainty (see Hofstede 1994:126). Germany comes to mind for many people in international business as being high on UA. The Germans so hate the idea of uncertainty that they even have a set of laws (*notstandsgesetz*), which would come into force if all of their other laws broke down. The UK, on the other hand, is an example of a country that tolerates more ambiguity, in general will take more risks and has fewer written rules. In contrast to Germany, the British do not even have a written constitution (see Hofstede 1994:126).

2.5.1.3 Individualism versus collectivism: identity in relationship to others

According to Hofstede, *individualism* describes a society in which the ties between individuals are loose: everyone is expected to look after themselves and their immediate family only. A person's identity is based in terms of 'self' and on individual achievements. *Collectivism*, on the other hand, describes a society in which people are integrated into strong, cohesive groups. People's identity is based on their group affiliation; loyalty to the group is essential; and individual achievements are subordinated to the welfare of the group (see Hofstede 1994: 260-261). Societies that are more *collective* tend to value conformity.

In a more *individualist* culture, decision-making in the workplace may be quicker, but the implementation may be much slower, as the workers may question the new method and want to know how it will affect them as individuals. In a more *collective* culture, it may take longer to come to a consensus, but once the decision is made, the people will tend to implement it quicker, since conformity and 'what's best for the group' is more important than 'what's in it for me' (see Hofstede 1994:49-78).

2.5.1.4 Masculinity versus femininity: gender roles and society

Hofstede defines a *masculine* society as one in which social gender roles are clearly distinct, that is, men are supposed to be assertive, tough and focused on material gain, while women are supposed to be more modest, tender and concerned with the quality of life. A *feminine* society, on the other hand, is one in which social gender roles overlap; both men and women are supposed to be modest, tender and concerned with quality of life (see Hofstede 1994:261-262).

More *masculine* societies value aggressiveness and assertiveness in pursuit of material gain. More *feminine* societies, in turn, value relationships and quality of life rather than material benefits. In the workplace this can be seen in different ways. For example, in more *masculine* societies, people value assertiveness over modesty, and in more *feminine* societies, like the Netherlands, Sweden and Denmark, modesty is valued. This can be seen by comparing the language used in applicants' curriculum vitae. An American would tend to oversell him/herself, extolling his/her strengths and virtues. Someone from the Netherlands, on the other hand, would downplay his/her capabilities. The potential misunderstandings are evident. A Dutch employer, who values modesty, would not be overly impressed with the over-the-top American application, while an American employer may not be sold on the more modest application from the Netherlands (see Hofstede 1994:79-80).

A second example has to do with conflict resolution. In more *masculine* societies like the USA, the UK and the Republic of Ireland, *'there is a feeling that conflicts should be resolved by a good fight: "Let the best man win"'* (Hofstede 1994:92). People in more *feminine* societies tend to prefer to resolve conflicts by compromise and negotiation.

2.5.1.5 Note on Hofstede's model

It is interesting to note that Hofstede often uses the words 'culture' and 'country' interchangeably. Hofstede's research has been very helpful in identifying cultural differences in the workplace, but a few things need to be kept in mind. Firstly, his research was conducted more than 30 years ago, before the days of fax machines, e-mail and the Internet. These recent inventions have radically changed the way in which business is conducted, especially internationally. The world is a different place now, *'the Cold War has disappeared, communism is a limping shadow of its former self, the Asian tigers are no*

longer mere cubs, China is furiously marketing itself (Holden 2002:34). Also, Hofstede's research was conducted only with IBM employees around the world. In the field of cross-cultural training, his material is used extensively. This researcher wanted to ask expatriates working in the 21st century, whether the issues that Hofstede found are still valid, therefore the questions on issues in the workplace in two of the EIs were based on Hofstede's research results.

2.5.2 Trompenaars' model

Fons Trompenaars is the cofounder of Trompenaars Hampden-Turner, an innovative centre of excellence for intercultural management issues in Amsterdam. Previously he was the managing director of the Centre for International Business Studies in the Netherlands, which is a consultancy and training organization for International Management. Although he is not an anthropologist, he addresses cultural differences faced by people working in international settings. At the time of his writing he had 15 years of academic and field research.

According to Trompenaars, people in every culture face universal problems. The particular solutions that different groups of people choose to solve these problems are what distinguishes one cultural group from another. This researcher had difficulty identifying exactly what Trompenaars meant when he used the term 'culture'. He seemed to use it interchangeably with 'society' and it connoted both nationality and ethnicity.

In his book *Riding the Waves of Culture*, Trompenaars (1994) identifies seven fundamental dimensions of culture that differentiate human groups:

- *universalism* versus *particularism* (relationships and rules);
- *collectivism* versus *individualism* (the group and the individual);
- *neutral* versus *affective* (the range of feelings expressed);
- *diffuse* versus *specific* (the range of involvement);
- *achievement* versus *ascription* (how status is accorded);
- attitudes towards time; and
- attitudes towards the physical environment

Trompenaars (1994:29-137).

In the next section these dimensions of which the first five are concerned with relationships between people, will be discussed briefly.

2.5.2.1 *Universalism versus particularism*

Trompenaars writes that in *universalist* cultures, rules are very important. There are certain standards, which are universally agreed on by the culture. For example, in Switzerland or Germany, people would not usually cross the street at a red light even at 1 am when there are no other people around. *Particularist* cultures, on the other hand, focus on the exceptional nature of the present circumstances. People in more *particularist* societies would rather protect a friend or a brother regardless of whatever rule he would break (see Trompenaars 1994:31-32). *Universalism* can be seen as a result of modernization, of more complex, developed societies. *Particularism* is usually a feature of smaller communities where people tend to know one another (see Trompenaars 1994:35).

In Trompenaars' opinion, people who differ in this dimension sometimes think the other one is corrupt. A *universalist* may say that a *particularist* cannot be trusted because he/she always helps his/her friends. A *particularist* could say a *universalist* cannot be trusted because he/she does not even help his/her friends. A *universalist* will be upset if a rule is broken. A *particularist* will be more concerned with how a particular action affects his/her family member or friend (see Trompenaars 1994:32).

Issues around contracts are another example of how one can see this difference in the business world. In *universalist* cultures, contracts are very detailed. They record what each party has agreed to and provide recourse if one fails to follow through. Lawyers are often used in the process of negotiation. Since a *particularist* is much more motivated by the personal relationship, such detailed contracts may seem to imply a lack of trust and integrity. Introducing contracts with strict requirements and penalty clauses implies that one party would cheat the other if not legally restrained from doing so (see Trompenaars 1994:40; also see discussion in Section 3.5).

2.5.2.2 *Collectivism versus individualism*

Trompenaars echoes Hofstede in his discussion of *collectivism* and *individualism* (see 2.5.1.3). One additional business consequence that Trompenaars indicates is that people from more *collectivist* cultures, like Japan, Singapore or France, usually prefer plural representation in negotiations. Groups are sent, especially to important negotiations, and unaccompanied people are assumed to lack status (see Trompenaars 1994:57; Section 3.4).

2.5.2.3 *Neutral versus affective in expressing emotion*

People from more *affective* cultural groups tend to show their feelings more easily by laughing, smiling, scowling and gesturing. Alternatively, people from more *neutral* cultures will try to keep their feelings carefully controlled and subdued. This can lead to miscommunication, as the *neutral* person can easily be accused of being cold, and the *affective* person can be seen as being out of control and inconsistent. Tone of voice, language pace (see 4.2.5), and non-verbal communication (see Section 4.3) often have an element of emotion. (see Trompenaars 1994:63-72).

2.5.2.4 *Diffuse versus specific*

This area describes whether people engage others only in *specific* areas of life, or *diffusely* in multiple areas of life. In *specific*-oriented cultures, a manager separates out the task relationship he/she has with a worker. If the manager meets this person outside of the work environment, almost none of his/her authority would diffuse itself into this new relationship. In fact, the worker may be more skilled in the other area where they meet, (for example, on the golf course) and the manager may defer to the worker in this situation. Each area of life is considered a *specific* case. In contrast, in more *diffuse* cultures, the authority relationship translates itself into every life space, wherever one meets the other person (see Trompenaars 1994:73).

Americans, in general, have much more public space than private space, and this can account for their 'friendliness'. This public space is segregated into many *specific* sections. Allowing

someone into one public layer of his/her life is not a very big commitment, but one may relate to the person on this level only (see Trompenaars 1994:74).

The Germans, in general, are a typical contrast. Their public space is relatively small; it is harder to gain access to their personal space; and one needs the other person's permission to enter it. Their private space is large and *diffuse*, meaning that once a friend is admitted in, they let them into all or nearly all of their private spaces. Also, a person's standing and reputation cross over these spaces (see Trompenaars 1994:74-75).

2.5.2.5 Achievement versus ascription: how status is accorded

Every society accords more status to certain members than others. Some give it on the basis of what their members achieve (*achievement*); others by virtue of their age, class, gender, education, and so on (*ascription*). The USA accords status more by *achievement*, while Austria, France, China and Japan place more value on *ascription* (see Trompenaars 1994:92-95).

In negotiations, sending even a very knowledgeable young person to deal with people ten to 20 years older, could insult someone from an *ascriptive* culture. *Achievement*-oriented companies from Western countries often send young, promising managers on challenging assignments to faraway countries without realizing that, in the receiving culture, their youthfulness and/or gender will not be an asset, no matter how well they achieve at home (see 3.6.4; Trompenaars 1994:99).

2.5.2.6 Attitude towards time

People in different societies view time in different ways. Some societies view the past as very important; others place more emphasis on the present; and yet others stress planning for the future. These views greatly influence corporate activities. With respect to the issue of time, '*the American Dream is the French Nightmare*' (Trompenaars 1994:10). Americans concentrate on their present performance and plan for the future. The French, on the other hand, have an enormous sense of the past and do not focus on the present and future as much as Americans do (see Trompenaars 1994:116).

In many Western cultures, time is perceived as passing in a straight line, as a sequence of events. In other cultures, time is perceived as moving in cycles, the past, present and future moving together. Of course these differences greatly affect planning, strategy and communication in a corporate environment, and can lead to misunderstandings and frustrations (see 3.6.7; Trompenaars 1994:107-124).

2.5.2.7 Attitude towards the physical environment

Trompenaar's last dimension of culture concerns the relationship between people and their physical environment. People from some cultural milieus see that for survival, they must act '*against and with the environment in ways to render it both less threatening and more sustaining*' (Trompenaars 1994:125). As economic developments have taken place, people from more 'advanced' countries have sought rather to '*control nature by imposing their will upon it*' (Trompenaars 1994:125). This dimension is not addressed in this research.

CHAPTER 3

THE EXPATRIATE'S WORKING ENVIRONMENT

3.1 INTRODUCTION

No one denies the fact that the volume of international business has increased exponentially in the past 50 years (see Appadurai 1996:27; Hofstede 1994:222). The development of technology, the decreased time needed to travel, as well as the increased speed of information exchange have facilitated these phenomena.

In order to avoid misunderstandings and offence, and to do one's job effectively, people who want to work successfully on an international level need to understand the cultural values of the people they are working with, albeit to a varying extent. A Korean IT man writing an accounting program, which will be used in several different countries, will need input from his overseas colleagues. He also may need information regarding how to address his colleagues and how to communicate politely, but he does not need to understand deeper value differences in order to do his job well. The German manager who travels to the USA for two weeks of meetings will need more practical information regarding punctuality, how closely one follows a business agenda in business meetings and the degree of formality in addressing one's colleagues. It would also be beneficial for him/her to understand some deeper issues such as how decisions are made and who has the power to make them, what expectations bosses and subordinates have of each other and the relative importance of tasks versus relationships. But expatriates who relocate to a different country must find out the practical ways people do things as well as the deeper value differences if they want to be successful.

This chapter will examine the difficulties and differences that research participants experienced in the workplace. The next four sections will examine issues identified by Hofstede (see 2.5.1) and then other business differences will be assessed.

3.2 ***POWER DISTANCE: DIFFERENCES IN VIEWS OF AUTHORITY***

As depicted in Section 2.5.1.1, *power distance* (PD) describes how people view authority as well as their expectations regarding their involvement in decision-making. There is a

continuum between more authoritarian and autocratic styles of leadership on the one hand and more egalitarian styles on the other hand.

From Hofstede's research results, he calculated a *power distance index* (PDI) for each country or region. These scores represent relative but not absolute positions of countries. All of his scores are based on answers given by IBM employees, but paradoxically they contain no information about the corporate culture of IBM; they only show the extent to which people from IBM subsidiaries in country X answered the questions differently from similar people in country Y (see Hofstede 1994:25-26). The PDI makes it possible to compare two or more different countries or regions with regard to leadership styles and expectations. A large difference in the PDI scores for two different countries would indicate a significant difference in leadership styles and expectations. A table with the results of Hofstede's data regarding PD is shown in Annexure D.

In EI-2, PD was defined and respondents were asked if there was a change in this dimension between their home and new working environment. Of the 125 expatriate workers who answered this question, 82% said that they did indeed experience a difference. They were also asked to give an example of how the change in PD was a source of stress in their work environment.

Of the respondents who said that they experienced a change in PD, 64% indicated that they moved from countries with a lower PD to countries with a higher PD (more democratic to more authoritarian). The findings indicated four major points of stress for the respondents who were in managerial positions. Firstly, they found that workers only did what they were told to do; they did not volunteer to do things that needed to be done nor did they take initiative. Secondly, these managers found it difficult to get negative information from the workers; the workers withheld negative information or even lied about it. Thirdly, the degree of formality was stressful for many respondents to get used to; and fourthly, these managers found it difficult to adjust to the new way of building rapport with their workers. Respondents who were not in positions of authority experienced stress because they were not able to give input into the decisions that the managers made which affected them, and they did not have access to their manager. Almost all of the 34% of research participants who moved from countries with a higher PD to countries with a lower PD were happier with this change and it did not cause them stress.

Pamela, a South African missionary working in Mozambique, had difficulty getting her team members to volunteer for jobs when she announced what needed to be done. Her old approach of asking for volunteers worked well in South Africa, but this made the Mozambicans uncomfortable: *'It was difficult to figure out how to get things done in our team situation. The Mozambicans don't offer to do things that I know they can do, they want to be told what to do'* (Pamela B. 2001 EI). Later she learnt that they were accustomed to leaders being more authoritarian and they preferred this leadership style. Once she realized this, she was happy to adjust her approach and to tell them what to do. They were much happier to carry out the necessary tasks and the work was accomplished. Knowing this leadership expectation beforehand would probably have spared misunderstandings and frustration. It is worth mentioning that this difference in leadership preference could be a result of years of colonial rule, but this preference also occurs in many Asian countries, which did not experience colonial rule. Regardless, it is a difference that expatriates need to be aware of, no matter what the cause.

Several research participants who moved from lower to higher PD (more democratic to more authoritarian) countries expressed their frustration in getting constructive criticism from their subordinates. For example, Fritz, a German researcher working in Ghana, had difficulty getting information that he needed from the local workers. Some things were not working well, but when he directly asked the workers about this, they would not tell him what was wrong. In Germany he was used to getting open and honest feedback, especially negative feedback, but this did not happen in Africa: *'In Ghana, subordinates avoid contradicting their bosses directly, even if they could positively contribute to improving the efficiency of the work'* (Fritz D. 2001 EI). With time he realized that by changing his approach, he was able to get the information he needed. He found that if he asked a group of workers to find out the information and have someone report back to him on behalf of the group, they would tell him what he needed to know.

Paul, from Germany, who was working in Indonesia had similar struggles getting negative information. He said that there is an Indonesian proverb that says that the important thing is to keep the boss happy, even if it means telling a lie, which also happened to him: *'To adjust to an environment which does not value straightforwardness, directness and truth, but rather which stresses rapport and telling the boss nice things, was definitely a difficult adjustment for me'* (Paul K. 2001 EI).

Building rapport with workers can be an adjustment, as workers' expectations can be very different. Mark, a British manager who worked in Egypt, experienced this difficulty. He personally valued being close and friendly with his employees and he attempted to build a good rapport with his workers by drinking tea with the painters in the workshop during their break. Unfortunately, to them this behaviour conveyed weak leadership and they stopped doing things he asked them to do, for example, working hard to meet a deadline: *'They could not really think of me as their boss because I didn't act the way they understood that bosses should act'* (Mark H. 2001 EI). Subsequently he learnt to build good rapport in a way that was culturally appropriate for them, being more formal and distant, even though it was not his preferred style.

An interviewee who was an employee, not a manager, experienced a different kind of stress. Pam is an American English teacher working at a university in the People's Republic of China. She explained that when she initially went to China, she experienced difficulty because she was accustomed to having some input regarding her schedule, the courses she taught, the content, textbooks, teaching methods, etc. In China she either had a very small input or no input at all into things that greatly affected her. Sometimes her boss would change her schedule with little or no notice at all: *'Often we only found out the day before our classes started which classes we would be teaching. That made planning extremely difficult and stressful!'* (Pam F. 2002 PI). Her only choice was to adapt to their way of doing things or return home. She chose to adapt and stay, but it remained difficult for her.

There are advantages in both high and low PD styles. In companies where the PD is high, there is usually good discipline within the company. If the PD is low, employees usually accept responsibility better (see Hofstede 1994:240). In the four examples mentioned above regarding PD, two of them corresponded well with Hofstede's data, (see Annexure D). For instance Germany (ranked 42nd) compared with Indonesia (ranked 8th) shows a high contrast in the PDI score. The UK (also ranked 42nd) compared with Egypt (ranked 7th) also shows a high contrast. The respondents quoted who moved from Germany to Ghana and from the UK to Egypt experienced this contrast. There was no data for the People's Republic of China nor for Mozambique.

From the above and other interviews conducted, it became clear that many expatriates are confronted with differences in authority structures and expectations of leadership. Awareness

of this disparity can help expatriates to make adjustments. If, however, people working in an international setting are unaware of these differences, it can cause frustration and discomfort for everyone involved. It may be uncomfortable for expatriate managers to change their style, but it usually has to happen to one degree or another to accomplish the tasks and for the sake of good working relationships. In some cases managers can explain their style and the employees have to adjust accordingly. If both parties, especially the managers, understand this concept, work can proceed with fewer misunderstandings. Expatriate employees sometimes do not have much say in how things are done. They basically have two options, either to accept their employers' way of doing things or to find another job.

The last question in this set was to test the importance that the research participants placed on this change in PD. They were given a scale from 1 (Insignificant) to 4 (Very Significant) and the results showed that almost 60% of the participants said the change in PD was either quite significant or very significant. This indicates that this was an important change for the participants. It is noteworthy to mention that this area of difference is not limited to an expatriate moving to a different country. People can also experience this difference when changing companies within the same country, as different companies have their own corporate culture. A manager's personality and personal leadership style also play a role. Certain people like to have more power and want more respect shown to them. What is important is that 82% of the research participants said that they experienced this change and expatriates would be well advised to be aware of this potential difference.

3.3 *UNCERTAINTY AVOIDANCE: FEELING THREATENED BY THE UNKNOWN*

As described in Section 2.5.1.2, *uncertainty avoidance* (UA) indicates the extent to which groups of people feel threatened by uncertain or unknown situations. The results show a continuum. High UA means that people tend to avoid uncertainty more strongly and are less likely to take risks. Low UA means that they are less threatened by uncertainty and therefore are more willing to take risks.

UA was defined for the research participants and then they were asked if they experienced a significant change in *uncertainty avoidance* by the people in their new work environment. Of

the 118 people who responded to this question, 85% said that they did experience a significant change.

The majority (58%) of the research participants who experienced a change in UA moved from countries with a lower UA to countries with a higher UA (feeling less threatened by the unknown to feeling more threatened). Generally participants were frustrated because they wanted to introduce change, but other people did not want to change. Another common response given by participants was that if change did happen, the implementation took longer and there was more bureaucracy involved. Participants from countries with a higher UA who moved to countries with a lower UA (36%) said that they experienced the trade-off as having fewer rules and more flexibility. Some mentioned that they were initially more uncertain of what was expected of them, but later learnt to appreciate the increase in freedom that they had.

High and low UA styles both have advantages in the workplace. In work environments that have a high UA, the advantage for the organization is precision. In companies where UA is low, the advantage is that they are more innovative (see Hofstede 1994:240).

Fritz, a German agricultural project manager working in West Africa, illustrated this style difference between being more organized and becoming more flexible. He explained that he enjoyed how things were always organized at home in Germany but he complained that there were too many rules. In contrast, public life in West Africa is not comparably well organized and one is often forced to change plans, which makes planning more difficult. Fritz's African colleagues often left plans open-ended. They would leave to go out of town on a work-related trip, even if they did not know where they would sleep that night. They were not worried if they could not find a hotel room, they would figure out a solution at the time: *'There would always be somebody who knows somebody who would be prepared to share a private flat to accommodate us for a night. It took me quite a while to get comfortable with that'* (Fritz D. 2001 EI).

There is often conflict in any kind of group when *collective* decisions have to be made. Some people want to try out new things and others want to leave things the way they are. This is also highly influenced by one's personality and cannot be wholly contributed to one's cultural background, but certain cultural domains have a tendency towards one side or the other. The

participants in this study gave many examples of how they tried to change certain things at work and were frustrated with other people who did not want change. There was not one single participant who stated that s/he wanted to leave things the way they were and was frustrated with people who wanted things to change. It seems clear that people who move to another country are inherently more willing to venture into the unknown and to take risks. Since moving to another country is definitely taking a risk, people who do not like to take risks often do not move overseas, either by their own choice, or because they are not selected to go.

Another example in dealing with change came from a German woman working in a literacy programme in Burkina Faso. Stephanie is naturally creative and she tended to constantly think of ways to improve the programme, change the curriculum of the teacher training, introduce incentives, etc. This caused problems between her and a colleague. She reflected that her main Mossi co-worker, a literacy coordinator with a university level education, was truly stressed by her ideas and suggestions and preferred to always leave things the way they had been done in the past: *'She would only agree to change anything if the top director told her flat out to change!'* (Stephanie R. 2001 EI). Local workers can be intimidated when foreigners come to show them different or 'better' ways of doing things.

An American teacher in China illustrated the phenomenon of people not being open to new things. Pam explained that in her experience in China, there has been almost no tolerance of innovative ideas and that conformity is of utmost importance. Rules and laws are very important, but unfortunately they are not always communicated or clarified for foreigners. She and her colleagues experienced a lot of stress because the Americans teaching there valued trying out new ideas and being creative: *'This caused a lot of problems in our dealings with officials or colleagues who knew things could be done much better, but they would not listen to us or be flexible with us in many situations'* (Pam F. 2002 PI).

It is also an important adjustment for expatriates to understand which of their expectations are realistic. Some participants expressed that it took much longer for change to take place. Brenda, an American communications skills trainer working in Italy, said that she experienced stress because in Italy it took much longer for new ideas to be accepted and for new enterprises to get going. In her experience, Italians tended to be suspicious of anything

too new, too modern, or too far off the beaten path: *'If you have a new idea, it will immediately be met with scepticism, which has been very demoralizing and depressing for me on many occasions'* (Brenda B. 2001 EI). These adjustments can be easier to accept if one understands that things will take longer, but if one expects change to happen as quickly as it does at home it can be very frustrating.

Several people working in Africa and the former Eastern Block countries mentioned the 'tall poppy syndrome'. In this illustration there is a field of poppy flowers. The proverb implies that if one poppy is taller than the others, it will be cut down. The same principle is true with people. If one person outshines the others, s/he will not be looked upon with admiration, but will also be 'cut down'. This is in contrast to many Western countries where someone who stands out and excels is admired. Similarly, Karen, a British personnel manager working in Russia, said that they have a saying left over from the communist days that 'the highest blade of grass gets chopped down'. This meant that it was dangerous to stand out. Innovation was frowned upon under communism and could lead to trouble, so it was safer to conform and not question things. The corollary was that her Russian co-workers still preferred to be given clearly detailed tasks and wanted the ultimate responsibility for results to lie with others, preferably a leader: *'The stress for me is try to get our workers to think for themselves, to create a Russian context for ideas and to get them to take responsibility for new initiatives. It's changing, but only very slowly'* (Karen P. 2001 EI). This example has an historical element. History plays a huge role in the shaping of values in each cultural domain. Whatever the cause, it still remains a difference that expatriates need to learn and understand.

From the results of his research, Hofstede created an *uncertainty avoidance index* (UAI) for 50 countries and three regions. As with his PDI, the UAI gives relative scores so that countries can be compared with each other. A high score indicates a strong desire to avoid uncertainty. Examples of countries/regions with high UAI scores are Latin America, Latin Europe and Mediterranean countries. Singapore, the Scandinavian countries, the UK and the USA have relatively low UAI scores. This table is found in Annexure E.

In the five examples given in this section, three corresponded with Hofstede's data, and the other two were not included in his study. There were two examples comparing Germany (ranked 29th) with West Africa (ranked 34th), and one example comparing the USA (ranked

43rd) with Italy (ranked 23rd). No data were available for China and Russia (see Hofstede 1994:113).

The last question in this set was to test the importance that the participants placed on this change in UA. They were given a scale from 1 (Insignificant) to 4 (Very Significant) and the results showed that almost 60% of the participants responded that this change was either quite significant or very significant. It is clear that people from different cultural domains vary in their comfort levels in taking risks and trying new things. This element also has a strong individual personality aspect. It can reduce stress and unrealistic expectations if expatriates understand their own personal tendencies, as well as the tendencies of the people in the cultural domain to which they move.

3.4 INDIVIDUALISM VERSUS COLLECTIVISM

As described in Section 2.5.1.3, *individualism* refers to a society in which the ties between individuals are loose: everyone is expected to look after him/herself and his/her immediate family only. One's identity is based in terms of 'self' and on individual achievements. *Collectivism* refers to a society in which people are integrated into strong, cohesive groups. One's identity is based on one's group affiliation. Loyalty to the group is essential and individual achievements are subordinated to the welfare of the group (see Hofstede 1994: 260-261). *Individualism* and *collectivism* are underlying cultural values. While they are better known and understood by expatriates than some other values, the practical implications in everyday life may not be readily identified.

After defining *individualism* and *collectivism* in EI-3, respondents were asked if they had experienced a change in this dimension when moving from one country to another. Of the 106 people that responded to this question, 80% said that they did experience a change. The majority (78%) of the participants who did experience this change, moved from more *individualistic* countries to more *collective* countries. They were asked to give an example of how this value difference had been a source of stress for them in their working environment. The findings indicated difficulties in several areas: the increased time necessary for decisions to be made; the importance of family obligations; the difference in the value of relationships versus tasks; and how to get answers from individuals in a group situation. There were fewer

participants (22%) who moved from a more *collective* to a more *individualistic* country. Generally they had difficulty with the lack of support from the people around them, as well as the relatively greater focus on tasks rather than relationships.

Several responses revolved around the issue of decision-making and the time it takes to reach a decision. Tom, an American engineering manager working in Malaysia, wrote that in Malaysia many decisions were made at group level. If one person was missing from the group, a decision could not be made until that person was available. What bothered him the most in his work situation was that people avoided taking the responsibility to make decisions individually and preferred to reach a group consensus: '*Sometimes they used that as an excuse not to make any decision at all*' (Tom R. 2001 EI). Knowing how decisions are made in the local context is crucial for an expatriate manager. In *individualistic* countries the boss often makes many decisions. In more *collective* cultural domains where consensus is important, it can cause problems if all of the necessary parties are not involved in the process. If someone forces someone else to make a decision before consensus is reached, the result will likely be counterproductive.

Another example regarding the time it can take for decisions to be made came from Linda, a South African nurse working in the Middle East. She experienced a shift towards *collectivism* and this required a complete change in her way of thinking. Often she would bring up an issue that needed to be discussed, but days would pass before she received an answer, as it had to be discussed with many other people. Sometimes she experienced a lot of stress because she needed an immediate answer to do her work properly: '*Sometimes I had to go ahead with what I thought was best as I couldn't wait for an answer. They didn't seem to understand that*' (Linda G. 2001 EI).

Anton, a South African financial manager working in Korea, also illustrated this point with an example regarding decision-making. He explained, '*In Korea, harmony is very important in making decisions. Meetings can carry on and on until everybody agrees and there is consensus*' (Anton V. 2003 PI). Expatriate managers need to learn to schedule enough time for decision-making in meetings in more *collective* countries.

Another practical way in which this value difference is seen, centres around family obligations. Fritz, a German agricultural project manager working in Ghana, explained that in

Ghana he had to accept that family affairs, such as birthdays, funerals or a relative in hospital, were more important than work in Ghana as compared to Germany: *'Family and social obligations came first for the people working for me. Their work, including deadlines and my priorities, came second and I found that difficult to handle'* (Fritz D. 2001 EI).

A German literacy worker, Stephanie, who was working in Burkina Faso, gave a similar example regarding funerals. If there was a death in a colleague's family it concerned everybody, not only that colleague and his/her family. No one stayed in the office; the whole staff abandoned their work, went to the funeral, and sat with the colleague and his/her family for hours on end. Several days later the staff went to visit the family again to 'greet' them once more. The colleagues would even go to the funeral if it was in another village or town. If it was far away, they would choose two delegates to accompany the suffering family to the village and stay there for the day of the funeral: *'I thought this was really over the top until I realized this is just how it is here and there is nothing I can do to change it'* (Stephanie R. 2001 EI).

In countries that tend towards *collectivism*, people often value relationships more than tasks. This affects the value they place on time spent with other people. Esther, a German personnel manager working in Spain and Morocco, explained that in both Spain and Morocco people love to sit together, drink coffee and talk. They are a lot more relaxed in terms of working hours and taking breaks: *'Sometimes I still feel guilty about this, spending time in a way that would be considered "wasted" in Germany'* (Esther H. 2002 I). Hendrik, a South African working in the Middle East, elaborated this point. He explained that Arabs will drink endless cups of tea and build relationships before the task at hand or any business issues will be discussed. In his experience in the Middle East, relationships were always more important than business. He thinks that this applies to companies as well as to individuals: *'Some companies will even go under financially because they would not want to ruin a relationship'* (Hendrik V. 2003 PI). This is very different to practices in countries where profit is the main goal.

Knowing the practical implications of these value differences is very helpful for expatriates and sometimes all that is necessary is to adjust one's method or strategy. Paul, a German teacher in Indonesia, illustrated that classroom discussion styles in Indonesia differed significantly from the style he was used to in Germany. It was hard, sometimes even painful,

to get answers from individual students to the questions that he verbally posed in class. He could only get responses if they came in the classical question and answer format in which the hierarchical structure between teacher and student was absolutely established and confirmed. He eventually learnt that if he asked the students to work informally in groups to find answers, they were more productive: '*After they discussed the answer in a small group, then more or less collectively and seldom by a single student, the answer would be given in class*' (Paul K. 2001 EI). By adjusting his classroom style, learning could take place and he could get feedback in a way that was culturally appropriate for the students.

Expatriates from more *collective* countries often miss the support they are used to receiving from friends and family if they relocate to a more *individualistic* country. Daniel, a professor from Kenya working in the USA, wrote that he missed the supportive relationships that he grew up with. In his experience in the USA, people minded their own business at the expense of mutual interpersonal relationships. He mentioned that despite the affluence around him in the USA, he felt that many people were suffering emotionally: '*In poorer societies I have noticed that a certain amount of stress is reduced by the presence and understanding of others. I haven't seen that here in the United States*' (Daniel O. 2001 EI). Expatriates from more *collective* countries may struggle with feelings of loneliness and feel isolated when confronted with the *individualism* in other countries.

Annexure F is a table of Hofstede's research results regarding *individualism* and *collectivism*. In each of the nine examples recorded in the section above, the results corresponded with the results of Hofstede's research. Germany (ranked 15th) was compared with four countries/regions: Indonesia (ranked 47th), West Africa (ranked 39th), Spain (ranked 20th) and Arab countries (ranked 26th). The USA (ranked 1st) was compared with two countries: Malaysia (ranked 36th) and South Africa (ranked 16th). South Africa (ranked 16th) was compared with two countries/regions: the Arab countries (ranked 26th) and South Korea (ranked 43rd). Just a note about the South African values: Hofstede's data for South Africa are from white South Africans only (see Hofstede 1994:130). White South Africans make up approximately 11% of the population. This must be kept in mind when comparing the values he gives for South Africa.

The last question in this set was to test the importance that the participants placed on this change regarding *individualism* and *collectivism*. They were given a scale from 1

(Insignificant) to 4 (Very Significant) and the results showed that half of the participants found a significant change in this dimension.

3.5 *MASCULINITY VERSUS FEMININITY: GENDER ROLES AND SOCIETY*

As discussed in Section 2.5.1.4, a *masculine* society is defined as one in which social gender roles are clearly distinct, i.e. men are supposed to be assertive, tough and focused on material gain, while women are supposed to be more modest, tender and concerned with the quality of life. A *feminine* society, on the other hand, is one in which social gender roles overlap; both men and women are supposed to be modest, tender and concerned with the quality of life (see Hofstede 1994:82-83). In the corporate world, businesses in more *masculine* societies tend to be more aggressive, competitive and concerned with profit. They often have longer working hours and give shorter holidays. Businesses in more *feminine* societies tend to be more concerned with quality of life, working environments and the happiness of workers (see Hofstede 1994:81-83).

In the opinion of this researcher, the terms ‘masculine’ and ‘feminine’ in this context can be misleading. For this reason, in EI-3 these were labelled M and F cultures and the definition was given. Of the 100 responses to the question asking if the participants experienced a change in this dimension, 85% said that they did experience a change. Of the participants who did experience a change in this dimension, 71% moved from a more M cultural domain to a more F one. The main findings from this group of participants were that in a more F cultural domain, they had to adjust the way they spoke to people, profit had a lower level of importance and conflict was handled differently. There were fewer participants who moved from more F to more M countries (24%). The examples that they gave had to do with the relative difference between the quality of life on the one hand and money and formal positions at work on the other hand.

Speaking assertively helps to achieve results in an M cultural domain, but it does not have the same effect in a more F domain. Ulrike, a German business consultant who was working in the Netherlands, gave an example of how this difference caused her stress. She explained that she found many advantages to the more F approach in the Netherlands, but coming from an M cultural domain, she found it difficult to adapt to them. In Germany, what achieved desired

results was when she made her point assertively, claimed her rights and sometimes even became angry or demanding. The same behaviour in the Netherlands simply did not work. She felt that her German accent also put people off, as many Dutch people consider Germans to be too assertive. She said she learnt that the trick in the Netherlands was rather to ask for help, which brought the desired results, but that was something that she definitely would not do in Germany: *‘Sometimes I felt dishonest when I asked for help when I really didn’t need it. I did it because it was the only way to get things done the way I really wanted them done’* (Ulrike B. 2001 EI). Not only can expatriates feel uncomfortable changing their style, they can also feel dishonest, which some expatriates have to deal with.

This example between Germany and the Netherlands corresponded with Hofstede’s research. In his studies, Germany was ranked 9th, which scored high on the *masculinity index* (MAS), whereas the Netherlands was ranked 51st, which is very high on the F side (see Annexure G). Something surprising was that in the previous three dimensions: *power distance*, *individualism-collectivism* and *uncertainty avoidance*, Germany and the Netherlands had very similar scores, whereas regarding the *masculine-feminine* dimension, there was a vast difference in their scores. These two countries are geographically close together and there are many similarities in their languages and customs. It is important for people working in environments in which many things are similar, to identify those things that *are* different. These differences are sometimes more difficult to pinpoint, but being aware of them can make working together with others easier and smoother.

Group dynamics are different in M and F cultural domains. In this regard Renate, a German counsellor working in Wales, explained that it took her a while to realize it, but one of the most important aspects in her leadership team set-up in Wales was being polite to one another. In her new team situation, quality of life, relationships and work depended on whether what had been achieved had been done *politely*. Germany is a more M cultural domain, where effectiveness and being decisive is more important than being polite. In Wales her job was to plan and organize seminars and courses. The leadership team needed to make many decisions, but she felt that the team members were so concerned about not hurting each other’s feelings, that often they did not make any decisions at all. Sometimes important issues were not addressed because it would mean exposing someone’s weakness: *‘My desire to be efficient in organizing the courses was often misunderstood as being impolite and uncaring, since I dared to bring up some uncomfortable but important issues and to make*

some decisions' (Renate M. 2001 EI). She learnt to be more careful with the particular words she chose to use, but she never got used to the indecisiveness and this frustration was a factor in her decision to leave her job a year later.

Profit plays a more important role in M cultural domains than in F cultural domains. Several respondents gave examples illustrating this difference. Eric, a German plant manager working in Malaysia, explained that in Malaysia, goods are not purchased from the best or cheapest vendor, but from the vendor with whom they have the best relationship: *'In my opinion, this wastes money and is frustrating when we exceed the budget needlessly'* (Eric L. 2001 EI). Differences in values can cause conflict, but if people know about the underlying value differences, at least they can understand *why* certain decisions are made, which can help reduce the aggravation.

Another illustration concerning the difference in values regarding profit came from Stephanie, a German literacy worker living in West Africa. There was an older Burkinabe man who should have been fired because he was not capable of doing his job. The board, the director and all decision-makers discussed the case and agreed that he should be fired. This meeting had taken place months previously but they did not actually fire him. Later they explained that they really could not fire him, because older people need to be cared for and respected, so he still sat in his office and received his salary. The Western expatriates were upset about the loss of money; the Burkinabe saw that this person had been there for several years, was part of the 'work family' and must be taken care of: *'The zero efficiency was not a problem for them, but it definitely was for us'* (Stephanie R. 2001 EI). This example clearly shows the conflict between valuing profit and productivity versus caring for a person.

Another practical effect of the M-F value difference is how conflict is handled. This phenomenon was of major importance for a considerable number of participants as many mentioned this factor. One example came from Robert, a Canadian company director working in the Philippines. He said that in the Philippines, smooth interpersonal relationships were highly valued. Because of this, it was difficult to confront someone who was not working up to standard. Any correction was taken as a personal affront and to shame someone was the worst thing you could do: *'I had to learn how to communicate that I wanted something to be done in a different way, while at the same time being very careful not to*

directly criticize the other person' (Robert S. 2001 EI). Robert did not share the specifics of how he got around that obstacle, but one can surmise that using polite language, rather than being direct and confrontational, was part of his solution. In other countries, Germany for example, being direct and confrontational is not offensive in many situations. This corresponded with Hofstede's findings. In M cultural domains, there is a feeling that conflicts should be resolved by a good fight, with the best man winning. In F cultural domains, there is a preference for resolving conflicts by compromise and negotiation (see Hofstede 1994:92).

Susanne, a Personnel Relations manager from the former East Germany who was working in the USA, gave an example of how employee benefits illustrated the difference between M and F cultural domains. She commented that in her experience, work was valued in both the USA and in Germany, but she saw a difference in the balance between life and work. She felt that in the USA, people live in order to work. She noticed that the majority of companies offered little vacation time and few benefits. This was a source of stress for her, because in Germany most employees received much more vacation time and many more benefits. She continued that in the USA, the work environment was also more competitive and money-orientated: *'I feel that Germany stresses a person's quality of life more than in the US, and I miss that'* (Susanne Z. 2001 EI). It is not uncommon for workers in Europe to be granted four weeks of holiday each year. More common in the USA is a two-week vacation, with four weeks annual vacation being granted only after many years of working for the same company (see Hofstede 1994:93).

The last question in this set was to test the importance that the research participants placed on this change regarding the M-F dimension. They were given a scale from 1 (Insignificant) to 4 (Very Significant) and the results showed that 60% of the participants said that this change was either quite significant or very significant. It can be summarized that expatriates should be aware of this difference and its implications in the workplace.

3.6 OTHER BUSINESS DIFFERENCES

The last set of questions regarding differences experienced by expatriates in the workplace was posed in EI-4. The participants were asked to give examples of differences that they experienced in ten different categories. Their responses are illustrated in Figure 3.1. In each

figure in this dissertation, the number of people who answered the question is identified by ‘ n =’ followed by the number of participants. In this example 105 participants answered this question, which is shown as $n = 105$ in Figure 3.1. The number at the top of each bar shows the percentage of participants who indicated a difference in the values underlying the category concerned. The categories will be explained and examples will be given.

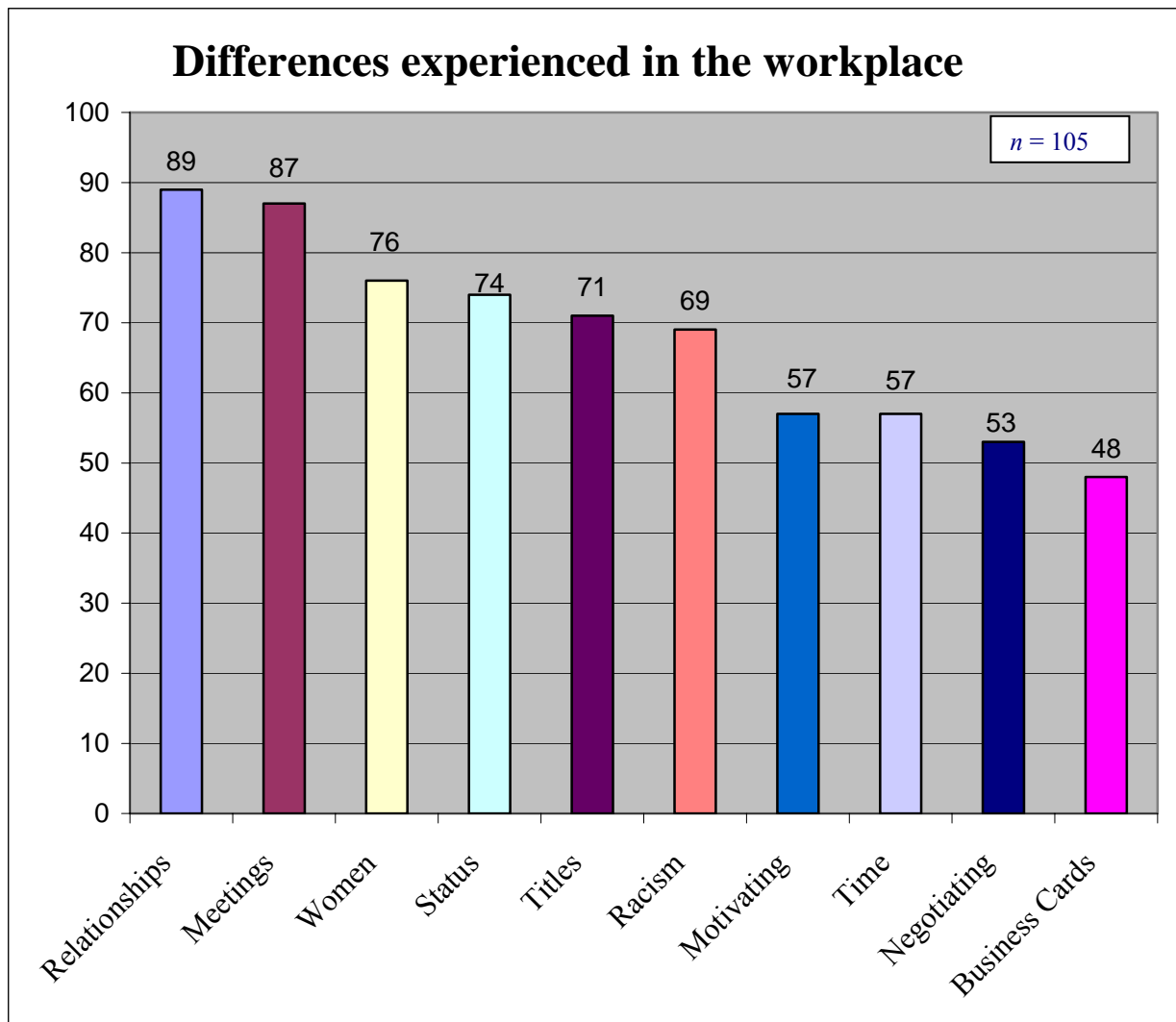


Figure 3.1 Differences experienced in the workplace

3.6.1 Relationships

Research participants were asked if, during their relocation to a new country, they experienced a difference regarding whether business could be conducted without having a relationship with the other party or if they needed to develop a relationship before they were

able to do business. Of the 105 expatriates who answered this question, significantly 89% said that they experienced a difference.

In some countries, like the USA, business can be conducted without developing a relationship between the parties. Gerhard, a French businessman working in the USA, experienced this difference. He expressed that in France, people want to build a relationship before doing business together. He said that in his experience, clients in the USA usually do not care about a personal relationship in this setting and do not see the need to build one: *'They want first and foremost to save time, which is their bottom line'* (Gerhard A. 2001 EI).

For the Japanese, building relationships before conducting business is very important. Rachel, a teacher from the UK working in Japan, stated that in Japan, the relationship is everything. The details of the business deal are a mere formality if the Japanese feel that they can trust you. In Japan it is important to take the time to build these relationships and to be patient in the week of socializing that often precedes signing a business deal: *'In Japan, the "let's-get-down-to-business" approach to save time will almost always fail'* (Rachel F. 2001 EI).

Mark, a British manager who worked in Egypt, expressed the importance of understanding this difference in Egypt: *'Can you do business without a relationship? Absolutely not! No relationship = no trust, and trust is the basis of business'* (Mark H. 2001 EI).

From these three examples it is clear that expatriates who believe that relationship building is essential can waste time and confuse someone who just wants to sign the deal. On the other hand, expatriates who just want to sign the deal may never get to that stage with people who want to build a relationship first. Not only expatriates need to be aware of this difference, but also people going on business trips. In this area of difference, it may be best for the people who do not need to develop a relationship to compromise and take the necessary time. Knowing this in advance will help them to plan the trip, schedule appointments and build rapport with the other parties involved.

3.6.2 Meetings

The difference in the way that meetings are conducted received the second highest number of positive responses, 87%. This topic included things like punctuality, the amount of advance time needed to schedule a meeting, having and sticking to an agenda, and if meetings were 'business only' or if there were also social aspects involved (see Mitchell 2000:134-141).

Alison, a university lecturer from the USA who worked in Israel, wrote that in Israel meetings are creative, 'somewhat free for all's', unlike the more structured and controlled meetings she was used to in the USA: '*Sticking to an agenda in Israel would be looked upon negatively and would be considered as cramping people's styles*' (Alison B. 2001 EI). Some people value order and accomplishing tasks, whereas other people value creativity and flexibility.

Germans are well known for sticking to agendas in business meetings (see Lewis 1999b:4, 54). Eric, a German senior plant manager working in Malaysia, expressed his frustration. He explained that as a German, he was used to being prepared and being punctual for meetings. This did not happen in his meetings in Malaysia and from his perspective, many meetings were a waste of time. They started late and took way too long. The Malaysians did not value planning agendas and would not stick to them anyway. In his experience in Malaysia, meetings always started with non-business related issues and ended with the important ones: '*This is completely opposite to what we value as good time management in Germany*' (Eric L. 2001 EI). From Eric's point of view, the others were wasting time and not accomplishing the important tasks. His goals were different to the Malaysians and this frustration is something that expatriates need to learn to manage.

Several participants mentioned that the difference regarding punctuality in meetings was something they had to learn to deal with. In this regard Pam, a teacher from the USA, laughed when she was asked this question. She said that in the People's Republic of China where she taught, they did not know what punctuality was. She went on to explain that most people there, unless they had worked abroad, did not see the need to be punctual. In her experience in China, meetings only started when the person in authority arrived and said that it was time to start: '*The agenda is usually fluid and much of the conversation has little to do with the actual topics that they were supposed to be covering*' (Pam F. 2002 PI).

Some issues surrounding punctuality can be as a result of other factors, not just cultural values. Harald, a German project manager who was working in Botswana, wrote that punctuality was less important in Africa than in Germany. But he felt that this was a result of the transport problems that many Africans faced. Many local people did not have their own vehicles and had to rely on public transportation, which was sometimes unreliable and unpredictable. Meetings in Botswana also usually lasted longer than in Germany: *‘Everything had to be considered and if somebody, let’s say after two hours of discussion, raised a point again which had already been settled, it was much more tolerated than if that happened in Germany’* (Harald Z. 2001 EI).

3.6.3 The position of women

More than three quarters, 76%, of the participants stated that women were valued or treated differently in the country where they worked, in comparison to their home country. For example, women in the USA have achieved close to equal status with men. In many other regions, such as Africa and the Middle East, women are viewed as ‘inferior’ to men and are treated as such. Although women have made great gains towards equality in the past 40 years, the reality is that the world of international business is mostly still run by men (see Mitchell 2000:110-120).

In this regard Brenda, a female communication skills trainer from the USA working in Italy, stated that she had many friends from the USA who worked for companies in Italy, who felt that they were not taken seriously: *‘We women find it difficult to be respected for what we know and what we can do. Women are usually underutilized, especially if they work for an Italian owned company’* (Brenda B. 2001 EI). This information would be especially helpful for female expatriates going to work in Italy.

Proverbs quoted by people in different countries often reflect their values. For example, a well-known American proverb is ‘a stitch in time saves nine’. This illustrates that thinking and planning ahead saves time, which is an important value in the USA. Bruce, an American English teacher working in the People’s Republic of China quoted Mao, who said that ‘women hold up half the sky’. He said that women rarely hold important positions in the

business world, but *'on the other hand, in families women exert a lot of pressure, especially mother-in-laws!'* (Bruce G. 2001 EI).

An example showing the dichotomy between how males and females are treated is seen in the naming practices in traditional, rural China. There, both infant boys and girls receive names, but as they grow, boys accumulate more names, which increases their importance. Unlike boys, girls lose the one name that they have when they marry (see Watson 1986:4). This is a radical difference that most expatriates will not have to deal with, but for someone working in rural China, it would be helpful to understand the present in the context of the past.

Understanding the value differences between cultural domains and learning how to accomplish one's goals in a new setting are both important. Denise, a management consultant from the Philippines who worked in the UK, used her understanding of the cultural differences creatively in order to be successful in her work. She explained that people's views towards women in the UK were confusing. Even though equal opportunity laws were in place, many women still experienced a glass ceiling in their work environment. She was a very successful consultant in the Far East before moving to the UK, but found that company executives in the UK would often not buy her services when she presented them personally. She found a way to deal with this problem by asking a trusted older British male colleague to meet with potential clients for her. Then she would produce the training plan and course content, and she often ended up running the courses: *'I found it more lucrative to use an older, white English male front man and to be pragmatic about the English view of women, even though I did not believe a woman should have to put up with that'* (Denise N. 2001 EI). This is an example of accepting the situation but finding a creative way around the obstacle.

3.6.4 Status

In some cultural domains, status is attributed according to a person's age, gender or family name. In other cultural domains, status can be earned according to one's accomplishments. Participants were asked if they experienced a change in how status is attributed or achieved as they relocated. From the 105 people who responded to this question, 74% noted a difference.

In more traditional cultural domains, like Africa, the Middle East and many countries in Asia, status is given according to age, gender and family name. The USA is an example of a country where status can be earned. This is also part of the so-called ‘American dream’, the belief that anyone who works hard enough and has a bit of luck can become successful and wealthy. Hamid, a Lebanese engineer who worked in the USA, said that he saw a big difference between the importance of age and who got promotions in the workplace. He said that in Middle Eastern society, a young person would rarely be promoted to a senior position, as these were reserved for older people: *‘I found the Western mentality much more open to young people getting senior positions, and I had to work at not being offended for the older ones who didn’t get the promotion’* (Hamid N. 2001 EI).

It is obviously important for expatriate managers who are in the position of giving promotions, to understand how this is viewed in the new country. They need to be aware of the implications if they decide to go against ‘the local way of doing things’.

3.6.5 Titles

Japan and Germany are two examples of countries where using titles is very important, both for the people who have the titles and also for the people addressing them. In other countries, such as the USA, titles in general are not as important and people often address others, even CEOs, by their first name. Of the expatriates interviewed, 71% responded that they experienced a change in how titles were valued and used differently within the workplace.

In certain countries it is crucial to know a person’s title and to use it correctly. For example, Julie, a public relations officer from the UK who worked in Austria, explained that one has to be sure to use *all* of a person’s titles and also to say them in the right order. Even a humble teacher had a title: *‘Woe betide you if you made a mistake! You could offend someone greatly, thus affecting your future relationship with them if you didn’t get it right’* (Julie B. 2003 PI). It is advisable for anyone working in a different country to find out the proper way to address people. Expatriates can sometimes use the excuse that they are not from that country and ask the other person how they would like to be addressed.

Participants in this study noted that regarding the use of titles, it was not always easy to find out what another person's qualifications were, especially if they were not properly introduced. Paul, a German manager working in Southeast Asia, explained that this was one of the most sensitive topics for Europeans in Southeast Asia. In Indonesia, forms of addressing people depended on many variables such as age, gender, social status, ethnic group, etc. Upon meeting someone for the first time, it was important to assess the status of the other person as soon as possible. This was usually done by addressing each other according to assumed roles, i.e. relatively vague at the beginning. Then the pattern of role-relevant questions would start: *'where are you from, what is your language and ethnic group, are you married, family status and job etc. It takes a long time to learn to do this properly; it's a bit like dancing really'* (Paul K. 2001 EI). People who grow up in these countries are accustomed to this 'dance' but this is something that many expatriates need to learn how to do.

It is obviously important to learn the socially acceptable way to address people when meeting people in a different country. Often there is also a level of emotional comfort attached to the use of titles, or conversely, the more informal use of one's name. In this regard Mark, an engineer from the UK who worked in Egypt, explained that when he first went to Egypt he was given a title and people addressed him by this title, not by his name. This felt impersonal to him because in the UK calling someone by name is considered more personal. He said that he did not find it difficult to use these titles in addressing others, as he accepted that as part of their way of doing things, but it was difficult for him to be called by his title and not by his name: *'It took me a long time to realize I should not try to stop them using a title for me; even though it was uncomfortable for me, it was comfortable for them'* (Mark H. 2001 EI).

Most of the responses in this category were given by participants who came from more informal *domains* and who had to learn to use titles. It can be surmised that people who prefer the use of titles also felt uncomfortable addressing others and being addressed in a more informal way, but there were no specific examples to illustrate this.

In an informal conversation, two Korean students who had been in South Africa for only six weeks, expressed this difficulty. They were participating in a 6-month training programme and were told to address the leaders by their first names. They felt very uncomfortable doing this and ended up trying to avoid using their names at all. These students did not fit the

selection criteria, as they had not lived for one year in another country, so they were not formally interviewed.

3.6.6 Racism/discrimination

Racism and discrimination still exist in varying degrees in many parts of the world. When asked to comment on the differences experienced regarding discrimination from one country to another, 69% of the participants noted a difference.

South Africa is an example of a country where discrimination was legalized under the apartheid government. These laws were repealed in 1994, but the effects of decades of legalized racism can still be felt long after the laws have been changed. Natalie, a company director from the USA who worked in South Africa, had difficulty with this. She noticed that the Black and Coloured South Africans recognized the opportunities available to them with the demise of apartheid, yet they struggled with acquiring the technological skills quickly enough to become competitive in the job market: *'I know this cannot change overnight but I get discouraged as I realize how long it is going to take for the Blacks and Coloureds to compete on an equal level'* (Natalie B. 2001 EI). It is important for expatriates to know the history of the country that they relocate to, as well as the implications thereof, in order to better understand the issues that local people face.

Past wars and experience of being dominated can play a part in people's attitudes in the present. Pam, an American woman who was teaching in China, said that racism exists on a huge scale in China. She felt that in China, Americans are tolerated by the older generation and loved by the younger generation, but that they *'literally hate the Japanese! Also, in China, if you are not Chinese, in many ways you are considered a non-person. As an American from the Midwest, I'm not used to that'* (Pam F. 2002 PI). Rachel from the UK, who was working in Japan, gave another example. She wrote that racism against Koreans and Chinese exists in Japan because of previous wars and conflicts: *'There is also racism indirectly against Westerners, but it is a double-sided coin; sometimes it is positive discrimination and sometimes it is negative'* (Rachel F. 2001 EI). It is helpful for the expatriate to know how people from the new country view people from the expatriate's country.

Racism can be a very sensitive issue for the people being discriminated against. The need to belong is a basic human need and discrimination excludes people from belonging. Denise, a respondent from the Philippines, wrote that in Japan she often felt like an outsider. She felt more included in a group situation if she did not speak, because as soon as she opened her mouth and stilted Japanese came out, their view of her changed. She felt that when someone was recognized as a foreigner, they always remained a foreigner: *'Some of my full-blooded Japanese friends who were raised outside Japan were also regarded as outsiders and it hurt them very much because they wanted to belong to their own culture, but they felt shut out'* (Denise N. 2001 EI).

3.6.7 Time

In some cultural domains, people view time in a linear fashion. They do one thing at a time and appointments are meant to start and end on time, as is common in Germany. In other societies, the view of time is more cyclical; people do several things at once, interruptions are normal and flexibility and relationships are important. The Latin countries are examples of this. Most cultural domains fall somewhere between the extremes (see Lewis 1999a:52-64). Of the participants in this study, 57% said that they experienced a change in how people viewed time as they moved from their home to their new country.

Richard, an American international corporate lawyer who worked in Europe and Asia, explained his opinion of how people view time differently. He wrote that people in the USA and Anglo-Saxon countries view time as linear and are task oriented, while Latin (including Southern Europe), Asian and Arabic countries view time as more cyclical and are more relationship oriented: *'Even though people in Asian countries, such as Hong Kong, Singapore and Taiwan, say "time is money" they are still very relationship oriented, hierarchical and holistic in their thinking processes'* (Richard R. 2001 EI).

Sometimes when people's views of time are different, they think that the other person's view is wrong. A humorous response came from Michael, a South African who worked in the Middle East. He wrote that *'Arabs have no concept of time at all!'* (Michael C. 2001 EI). Of course they do have a concept of time, it is just different to his.

3.6.8 Motivating employees

Successfully motivating employees can differ from one country to another. In some countries, like the USA, financial rewards and public recognition are good motivators. In many Asian countries, for example, providing care for an employee's family and a strong sense of belonging to a group motivates employees. More than half (57%) of the participants in this study said that there was a change in the way employees were motivated in the country they moved to, as compared with their home country.

Rachel from the UK, who was working in Japan, explained that in Japan, the company one works for could be compared to a family. Often companies provide employees and their families with excellent health care, housing, school and university fees for dependents, pensions, shares in the company and more. This results in considerable loyalty to the company. Unions are often in-company rather than across a discipline, making it less likely for employees to strike. This is different from the UK, where employees are given a salary, but they usually have to take care of their own housing and their children's education: *'Another difference I experienced is that in Japan there is less day-to-day on-the-job-encouragement than we are used to in Britain, where employers affirm employees more'* (Rachel F. 2001 EI).

Sometimes a good motivator in the workplace in one country can be a wrong one in another country. Mark, an engineer from the UK who worked in Egypt, illustrated how a good intention backfired. He wrote that in the UK, his employees liked to be singled out by their accomplishments and to be publicly rewarded. But in Egypt, doing that would make them stand out from the group and would make the group look for ways to undermine them (see Section 3.3). An American CEO of an international company in Cairo did not understand this. He had a team of managers, but he relied heavily on one local manager in particular. This man was very capable, but the American's mistake was to give this manager a much higher salary, as well as more status than the other managers. This man had direct access to the CEO, whereas the others on the management team did not. After several months, the other managers got together with the auditor and brought allegations of corruption against the senior manager. It was carefully orchestrated and the evidence seemed conclusive, as all the managers had 'proof'. The senior manager was fired on the spot, but the allegations were

totally unfounded: *'Maybe the key is in the word outsider. The senior manager in this case became outsider and was pushed out by the group'* (Mark H. 2001 EI).

3.6.9 Negotiating

The responses in this category did not match with the intent of this question. Participants were asked in EI-4 to comment on differences they experienced regarding which people are sent to negotiate with other companies and who can make the final decision. More than half of the participants made a comment about this, but most of them were not relevant.

It is important to know whom to send to handle negotiations with another company when trying to get their business. Richard, an American international corporate lawyer, explained that in his experiences in hierarchical societies, the decision maker was rarely part of the negotiating team. This contrasted with the USA, where every team had a final decision maker. In the USA, negotiators were usually chosen for their technical or financial expertise: *'This was sometimes a problem if the person chosen was not good with conflict resolution. Mature problem solvers were necessary when impasses occurred, which happened frequently'* (Richard R. 2001 EI). (See Mitchell 2000:142-147.)

3.6.10 Business cards

The proper use of business cards, for example, when to give them to someone; how to receive them; and what information to include on the cards, differs from country to country. In this study, 48% of the participants said that they experienced a difference in their new country of residence compared to their home country regarding the use of business cards.

One difference mentioned by several participants was that in certain countries, especially in Asia, how one physically accepts a business card is very important. In this regard Cathy, an American teacher working in Laos PDR, explained that business cards were viewed with a sort of 'reverence'. They must be received with two hands and looked at very carefully by the recipient to show honour: *'Not to handle business cards properly is taken personally and could cause a great deal of offence'* (Cathy B. 2002 PI). In the USA, the way people handle

business cards is not that important. The proper way to handle business cards can make a good impression and avoid offending someone in cultural domains where this is important.

One respondent mentioned that the quality of the business card was important. Others mentioned that it was very important to have all of one's titles on the card. In some countries it was very important for an expatriate to have a business card in the local language on one side and in the expatriate's language (English in this instance) on the other side. It is important for expatriates to know the proper etiquette for using business cards and it is the subject of many books. In *A Short Course in International Business Culture*, a section is devoted to the importance of bilingual cards and even the proper way to give and receive a business card (see Mitchell 2000:53-55).

3.6.11 Other business items

The last question in this set regarding problems expatriates experienced in the workplace gave participants an opportunity to mention anything else that was difficult for them.

There are practices that are acceptable in one country and totally unacceptable in another. Julie from the UK, who worked in Public Relations in the United Arab Emirates (UAE), commented that in the UAE, bribery is common and does not seem to have an ethical dimension to it. Also in her experience, lying and cheating in the business community seems to be ethically acceptable: '*An Indian colleague once told me the 3 "C's" of selling: convince, confuse, then corrupt*' (Julie B. 2002 PI). How expatriates choose to act in situations like this will differ from person to person, but it is helpful to be aware of these differences.

The concept of 'saving face' or not publicly embarrassing someone is very important in some cultural domains, especially in the Middle East and Asia. Hamid, a Lebanese broadcasting engineer who studied and worked in the USA and Cyprus, wrote that there were many times when colleagues came to him embarrassed and upset because a Western manager had corrected them in public: '*We would never do that in Lebanon and it is very difficult to deal with. Western managers need to realize how damaging it is to do this to people from my culture*' (Hamid N. 2001 EI).

Sometimes there is a conflict between telling the truth and trying not to offend someone. In some cultural domains telling the truth is more important. In others, not offending someone is more important. Deborah, an American marketing manager working in Japan, said that *'harmony in relationships is more important than truth in Japan'* (Deborah H. 2001 EI). (See Section 3.2.)

The importance of relationships in a business setting differs from one place to another. A Canadian director working in the Philippines wrote that maintaining smooth interpersonal relationships is very important in the Philippines. If you have offended someone, it is very hard to rebuild a relationship: *'Forgiveness does not come easily'* (Robert S. 2001 EI).

The view of rules in the workplace can also differ between cultural domains. Anna, a Hungarian project coordinator who worked in Italy, said that Italians frequently looked for and found ways around rules without serious consequences, while Hungarians learnt to respect regulations without questioning them. Her basic assumption was that rules were there for some reason and violating them would have consequences, so therefore she respected them: *'I struggled with the fact that Italians only respected rules if they made sense to them and suited them in a concrete situation'* (Anna K. 2001 EI).

CHAPTER 4

VERBAL AND NON-VERBAL COMMUNICATION DURING THE EXPATRIATE EPISODE

4.1 INTRODUCTION

Communication can be defined as the ‘exchange of information’ and this include words, ideas and emotions. Communication involves a sender, a recipient and a message. Information is the carrier of meaning. People can only communicate effectively if they share, at least to some extent, a system of meaning (see Trompenaars 1994:67). According to an article by the Carolina Entrepreneurship Club (2005), most of us spend about 75% of our waking moments communicating our knowledge, ideas and thoughts to other people. ‘*We say that effective communication takes place whenever the recipient understands the message in the manner intended by the sender, and the presentation of the message does not deviate from the recipient’s code of communication*’ (Pinto 2000:20). It follows that people from different cultural domains may experience problems when communicating with one another.

Communication can be broken down into *verbal* and *non-verbal* categories. ‘*Verbal communication requires a language*’ (Khan 2005) including both oral and written forms. Language is a primary tool that people use to communicate with one another. ‘*Language is transmitted through learning*’ and ‘*is based on arbitrary, learned associations between words and the things for which they stand*’ (Kottak 2000:82). Symbols are signs that do not have a natural connection to the things that they represent or for which they stand. For example, a pet that barks can be assigned the name *dog* or *kutya* or any number of other symbols in other languages. Words are linguistic symbols, but there are also non-linguistic symbols such as flags, which represent countries and small red ribbons that represent HIV/Aids awareness. People in different cultural domains learn to attach different meanings to different symbols.

One obvious problem in communication is when two people do not speak the same language, as often happens when people move from one country to another. If this is the case, one important question for the expatriate to consider, is whether s/he should learn the local language. This is one of the issues that will be addressed in this chapter. But communicating effectively entails more than just understanding the meaning of words. It is important for

foreigners to understand other differences, such as the *pace* and flow of conversation, the degree of *formality* preferred, if speaking *directly* is appreciated and even how much emotion is acceptable. Disagreements occur in relationships and business transactions, but the appropriate way to handle these disagreements can differ between cultural domains. A businessman may want to handle conflict with his wife differently than he would handle conflict in a board meeting or while playing soccer. These are examples of three different personal domains in which individuals may function and find complex to negotiate. Entering into a new cultural domain in a different country, where the symbols are unknown to the foreigner, can be even more complicated.

Although language is a primary means of communication, it is not the only way that people communicate with one another. *Non-verbal communication*, including facial expressions, gestures, touch, eye contact, dress, personal space, smiling and posture, also conveys information to other people. These forms of body language may even be far more important than the words that people speak when delivering a *verbal* message. Researchers ‘*estimate that less than 10 percent of the whole message understood by an audience is the actual content, some 30 percent is attributed to the pitch and tenor of a person’s voice and 60 percent to other forms of non-verbal communication from body language to facial expressions to hand gestures*’ (Mitchell 1999:77). Symbols, norms, standards and expectations, both in *verbal* and *non-verbal communication*, can vary greatly from one country to another. It is helpful for expatriates to be aware of these differences in order to communicate well and be successful (see Hess & Linderman 2002:13-29; Kohls 2001:75-90; Storti 2001a:97-115).

For the purpose of this dissertation, the different aspects of communication that will be investigated will be categorized as *verbal* or *non-verbal communication*. In reality there is a significant overlap between these categories. In this chapter, messages that are conveyed using *words* (including *pace* and flow of conversation, degree of *formality*, *direct* versus *indirect*, showing emotion, and handling disagreements) will be addressed in Section 4.2. Section 4.3 will include information that is conveyed without using words, namely, touch, dress, personal space, eye contact, gestures, smiling, posture and position of feet.

4.2 VERBAL COMMUNICATION

4.2.1 Learning a new language

Learning a new language takes a lot of time and effort. Whether an expatriate chooses to learn the local language depends on many variables. Some examples from the researcher's personal and training experiences (also see Hess & Linderman 2002:13-15) are:

- how long the expatriate plans to stay in that country;
- how much time s/he has to learn the new language;
- if it is necessary to do his/her job properly;
- if it is necessary for practical daily living;
- if the local people speak the expatriate's language;
- if there is a lingua franca (like English) in which people can communicate;
- if s/he has a desire to learn the language;
- how difficult the language is;
- if the expatriate desires to integrate into the local community; and
- if there is an accessible language school.

In EI-5, participants were asked if they had learnt a new language and whether they *needed* to or if they *chose* to. Of the 122 people who answered this question: 64% said they *did* learn a new language; 26% said they *did not* learn a new language; and 10% said they learnt phrases only. Of the 64% of participants who said they *did* learn a new language: 85% said they *had* to; and 15% said they *chose* to. Of the 26% of participants who *did not* learn a new language, 84% said there was *no need* to learn one; 9% said they *regretted not* learning the language; and 6% said they *chose not* to.

For some expatriates it is imperative to learn the local language in order to live in that country. For example, Michael, a South African working in the Middle East, commented that he could not have survived without learning Arabic. He explained that where he lived, the road signs were only written in Arabic as well as many labels at the grocery store. Once he bought what he thought was icing sugar, which was wrapped in a see-through package: '*It looked and felt like icing sugar, but the label was only in Arabic. When I sprinkled it on my food, only then did I realize it was corn flour!*' (Michael C. 2001 EI).

Another important decision all expatriates need to make is to what extent they wish to integrate into the local community. Some expatriates, especially in the Middle East and in Asia, choose to live in separate housing areas with other expatriates. There, English is often spoken in the shops and there is less need to learn the local language for daily living needs such as shopping. Other expatriates desire to integrate into the new community and so they choose to live amongst the locals and to learn the language. Cathy, an English teacher from the USA living in Laos, gave one example of someone who could have got by with English, but who chose to learn the Lao language. She explained that it was a high priority for her and her husband to learn the Lao language and live amongst the Lao people: *'Most of the women my age here do not speak English and even though I could get by here with English, I felt I needed to be able to speak Lao in order to fully integrate into the culture'* (Cathy B. 2002 PI). Their desire to integrate was so strong that they also sent two of their children to the local Lao school, even though they had the option of sending them to a nearby American school.

Some expatriates learn the language of the destination country before they arrive there, but learning a foreign language in one's home country is not always enough. There are many cultural components that underpin the use of language that one can best learn in the new country. One example came from Renate, a German teacher and counsellor working in the UK, who explained that she could speak and understand English well and considered herself fluent. This however caused misunderstandings, as she only realized later that she had learnt English in a German context. She explained that when she spoke English, she used her German way of speaking, which was too straightforward and *direct* for them. In meetings she said things like: *'This method that we are using is definitely not working!'* Later she realized that in this situation they would say something like, *'"Maybe we should consider trying this other method sometime." My directness was not appreciated. I slowly learnt that knowing the English words wasn't enough, I also had to learn the way the English people use them!'* (Renate M. 2001 EI).

Sometimes expatriates would like to learn the new language, but many of them who are transferred to another country arrive there with a huge backlog of work waiting for them. Because of the urgency of the work requirements, sometimes learning the language is not a realistic option, even though they would like to. This happened to a South African financial advisor who moved to South Korea. He started off studying the language but then his workload became too much: *'My advice to anybody would be to study the language first*

before you start your work commitment. After you work a full day, you are too tired to study language' (Anton V. 2002 PI).

One surprising finding was that 9% of the participants who did not learn a new language said that they regret it now. This question was not asked, but the participants volunteered this information. This is significant advice for people moving to a country where a different language is spoken. There are many variables to consider, but it is the researcher's opinion that in many or most instances it is worth taking the time and making the effort to learn the new language. Victor, a British Bible teacher who lived in India and Pakistan for two and a half years volunteered, *'I did not learn a new language and I regret now that I didn't take the time to learn one'* (Victor T. 2001 PI).

4.2.2 Language pace: use of pauses and interruptions when speaking

The use of pauses and interruptions is known as *language pace*. In EI-5 this was described as follows:

'Styles of verbal communication differ. For the Anglo-Saxons, when Person A stops speaking, Person B starts. It is not polite to interrupt. The more verbal Latins feel free to interrupt each other, which shows that they are interested. Oriental languages use silence between exchanges, which is a sign of respect. Unless this is understood, we can misunderstand each other or feel uneasy' (see Trompenaars 1994:68).

Participants were asked if they noticed this difference between their home and new cultural domain and if so, whether it bothered them or not. Of the 115 people who answered this question, 66% said that they noticed it. Of the participants who noticed this change in *language pace*, a little more than half said that it bothered them. In analysing the responses, it was noticeable that some respondents were very emotional, using many exclamation marks. In fact, several people said that this problem bothered them a great deal, but they never actually realized what it was that was bothering them until they read this question.

This aspect of language usage can lead to many misunderstandings and therefore it is helpful for people working or living in a different country to understand this difference in

communication. For example, in Latin countries, when people interrupt one another, it can show that they are interested in the conversation. In Japan, if one does not allow for a couple of seconds of silence before responding, someone who is higher in status could be offended. One Hungarian respondent kept getting offended when her Italian friends continually interrupted her. A German respondent felt excluded from many conversations with her Brazilian friends who continually interrupted one another. She learnt as a child that interrupting was bad manners and she could not bring herself to break into a conversation if it meant interrupting.

Another example to illustrate the point that for some people interrupting was considered bad manners came from Brenda, an American communication skills trainer working in Italy. She shared that she found it quite difficult to participate in conversations in Italian. This was not only because of her lack of fluency in speaking Italian, but also because she waited for people to finish their sentence before she spoke. Her problem was that other people began responding even before the first person was finished speaking. She said that in Italy, if someone wants to participate in a conversation, there is no other option but to interrupt. *'I really find it rude, but in order to function effectively in this culture I have to go against my own predisposition and do something that is uncomfortable for me'* (Brenda B. 2001 EI).

Difference in *language pace* can cause uncertainty and discomfort unless one understands it. Cathy, an American interviewee, explained about her experience in this regard in Laos. She said that sometimes when she asked someone a question, they did not answer her. She did not know if they did not understand her, did not hear her, or just simply did not want to answer. She often felt very awkward and quickly moved on to another topic. Then, all of a sudden, they answered her first question: *'I eventually learned to wait for an answer without feeling so uncomfortable, but it took me a while to figure that one out'* (Cathy B. 2001 PI).

It is possible to adapt, but it is not always easy, as a Spanish university lecturer in the USA commented. Inez clearly noticed the *language pace* difference and it was difficult for her to change: *'It is still very hard to keep my mouth shut at meetings and wait for my turn. I try to be very conscious of how impolite it can seem to others'* (Inez A. 2001 EI).

There were two respondents who disagreed with the premise as it was stated in the question. Silke, a German social worker who had lived in the UK and China, felt that the difference in

language pace was gender related. In her opinion, females are more relationship and listening orientated whereas males are more control orientated. She found that in business situations, Germans often use a control-orientated, lengthy, one speaker at a time pattern. She felt that that was often a power play for ‘male one-upmanship’. Regarding *language pace*, she did agree that adjusting to another language pattern could be difficult. She and her American partner were both frustrated with each other in this regard. Silke found the short, fast-paced turn taking American pattern quite a challenge to get used to. ‘*For me it is difficult to find the rhythm, boundaries, and the right place to start and stop. I have often felt excluded in group situations*’ (Silke A. 2001 EI).

There are a variety of power balances in every society, between older and younger people, between master and servant, between social classes and between men and women, to name a few. How language is used in these power plays would be a valuable study, but it did not fall within the scope of this research. Also because of the nature of using e-mail correspondence to a large extent, it was not possible to delve further into this area.

Another respondent, originally from the Philippines, who lived and worked in many Asian countries and the UK, disagreed with two points. Similarly to Silke in the above example, she felt that interrupting someone else is a power play and a demonstration of power. She noticed in general that, ‘*Latins do interrupt each other frequently when the people speaking are of equal rank, but they tend not to interrupt when the person being interrupted is perceived to have a higher status*’ (Denise N. 2001 EI).

This same respondent’s other comment clarified the statement about oriental languages using silence as a sign of respect. She commented that Chinese speakers interrupt one another frequently, but that silence is more important to Japanese speakers. She explained that this is also due to the structure of the Japanese language, where the nouns are in the front of the sentence and the verbs are at the end. This makes interruptions counterproductive, because one cannot know the meaning of what is being said without the verbs. She gave an interesting example:

‘Take this English sentence: “I accompanied her husband to a hotel to inspect a guest room for his visitors.” In the Japanese structure, this same sentence would be stated in this order: “I + together with her husband + to hotel’s guest room + for visitors + accompanied + inspected.” If I was saying this in Japanese and someone interrupted

me in the middle, it could be construed that I was up to funny business with someone else's husband in a hotel! Japanese typically wait for the whole meaning of the sentence to unfold before they respond, this also accounts for the few seconds silence between one speaker's statement and the other speaker's response' (Denise N. 2001 EI).

Rachel, a British woman teaching Business English in Japan, said that this difference bothered her a great deal. She commented that, '*The silences in Japan for me were very nerve-wracking!*' (Rachel F. 2001 EI).

People are often unaware of this difference. Gerard, a Frenchman, and his Chinese Malaysian wife were once meeting with the vice consul at the US consulate in Kuala Lumpur to inquire about work visas. While the vice consul was talking, Gerard interrupted him and asked him two more questions: '*My wife was upset with me afterwards, she obviously thought I was very rude, but I was just doing what was normal in my culture*' (Gerard A. 2001 EI).

It is quite helpful for expatriates to be aware of these differences as they move to another country. Eric, a German senior plant manager working in Malaysia commented, '*I noticed the oriental language style but it didn't bother me, because I had been prepared for that by an intercultural training course*' (Eric L. 2001 EI). This awareness does not solve the problem, but it can reduce some of the stress and discomfort that goes with it.

4.2.3 Formality versus informality preference

Responses to the first set of interview questions included the issues of formality versus *informality*, *direct* versus *indirect* communication (see 4.2.4) and communication disagreement (see 4.2.6). In some cultural domains, *formality* and protocol are very important. People treat others according to their status and people feel comfortable with this structure and the clear rules for correct behaviour. Conversely, in other cultural domains, *informality* and casualness set people at ease and promote good communication and relations.

The next question in EI-5 asked if the participants' personal preference or style regarding *formality* differed from the dominant one used in their new country. The answers showed that 80% of the 106 people who answered this question said that their personal preference

regarding *formality* and *informality* was different to what was appropriate in their new country.

It is important to know proper ways of showing respect to avoid offending people. Some of these practical rules are easy to learn. Annalies, a 65-year old missionary from South Africa who had worked in Swaziland, commented that showing respect and protocol were much more important in Swaziland than they were in her Afrikaans upbringing. She gave the examples that in Swaziland, to show proper respect you must greet elderly people before younger people and that children must never look a grown person in the eye: *'We did not know these things at first and we offended some of the Swazi people. Once we knew what was expected we could adapt easily'* (Annalies L. 2001 EI).

In most cultural domains there are sets of social structures and rules of protocol. The tricky part for an expatriate is learning what they are. Martin, an American English teacher living in Laos, said that the Lao rules and etiquette are unfortunately neither spoken about, nor are the local people skilled in communicating them to foreigners: *'I did not understand these social rules before I came here and no one told me about them! I often still feel like a duck out of water. I don't even know what questions to ask to find out the answers'* (Martin B. 2002 PI).

Many (67%) of the participants in this study came from cultural domains in which *informality* is preferred, and moved to cultural domains where *formality* and protocol are more important. In this situation, expatriates often experience difficulties learning some of the more subtle cultural norms. Unfortunately many expatriates have to learn these lessons by trial and error, as no one explains these norms to them. Kate, an American who studied the German language in Germany, illustrated this point. Kate knew some German, as she took four years of German classes at high school. She rented a room in the home of Frau Sauer, a 60-year-old German woman who did not speak English. Frau Sauer addressed Kate by her surname and used the *formal*, 'Sie' instead of the *informal* 'Du'. In German, as in many languages, there is more than one way to say 'you'. Kate had learnt the proper usage of these terms in her classes, but in Germany she was lonely and to her, being addressed in this *formal* way felt very cold and impersonal.

After living in Frau Sauer's home for two months, Kate told her that she would like to continue calling her 'Frau Sauer', but asked Frau Sauer to *please* call her 'Kate'. Frau Sauer

said she would think about it. The next day she told Kate that they could both use a first name basis, saying 'Du' to each other. Kate noticed that their whole relationship changed, and Frau Sauer, whom she now called Agathe, seemed much more friendly and warm. But the process was very awkward. It was only later that Kate discovered the German norm, which is that only the *older* person may approach the younger with the offer to change to a first name basis. In Germany this change to using 'Du' can be quite an event, especially amongst the older generation: '*I was so embarrassed when I found out, I wanted to change it all back, but it was too late*' (Kate T. 2002 PI). Frau Sauer later explained that to her, using the more *formal* form was a way of showing respect. Having this information beforehand would have helped Kate to interpret the behaviour and avoid an embarrassing situation for both of them.

Sometimes the necessary adjustments remain difficult and awkward but in other instances the expatriate prefers the change. Günter, a German engineer, gave one of the more rare examples of someone who moved from a more *formal* to a more *informal* cultural domain. He was transferred within the same company from Germany to the USA. In Germany, everyone in their company called one another by their title with their surname. In the same company in the USA, everyone, without exception, called one another by their first name. '*It was quite an adjustment for me, but surprisingly now it is more comfortable for me to use first names than the more formal way that I was used to in Germany*' (Günter L. 2001 EI). In a follow up e-mail several months after Günter returned to Germany, the researcher asked him how he found the adjustment back to the more *formal* way of addressing colleagues in Germany. He responded that although he preferred the more *informal* way, it was very natural for him to fit back into the *formality* in Germany.

4.2.4 Direct versus indirect styles of verbal communication

Another difference that people who travel or relocate experience, is how *direct* or *indirect* the style of communication is. In cultural domains that use a more *direct style*, the focus of communication is the exchange of information, facts and opinions, often with a view towards completing a task. Meaning is communicated *directly*, sometimes bluntly. Countries that tend to favour the more *direct communication style* are Switzerland (the German-speaking part), the Netherlands, Germany, Scandinavia, Australia, the UK and the USA. In these

countries, the words used are very important, and people want to hear the words spoken and to see the business details in writing (see Lewis 1999a:126-127; Trompenaars 1994:40-41).

In other cultural domains, a more *indirect style of communication* is preferred. The focus is more on the people, the relationships and the environment. Many things are not said *directly*, but rather implied. Countries that favour the more *indirect style* are Japan, the Middle East, the Philippines, most of Africa, China, Latin America and several other Asian countries. In these places, expatriates must learn to read the more subtle cues and especially watch the *non-verbal communication*.

The participants were asked in EI-6 if there was a significant shift in *direct* versus *indirect* communication in their move to a new country. Of the 115 people who answered this question, 75% said that they had experienced a significant shift.

To establish friendships, expatriates often have to adapt to a different style of communication. Cathy, an American, who said that she experienced a significant shift from a *direct to indirect communication style* when she moved to Laos, illustrates this. In the USA, when she and her husband visited friends, their evening was filled with constant *direct communication*, exchanging ideas and facts. They would ask one another many questions and find out what was happening with each person in their family and in the community. In Laos when they visited friends they would often sit and say nothing for long periods of time: '*Our Lao friends are very content just to be with us, to cook together and to eat with us without much conversation. That was strange at first but it is comfortable now*' (Cathy B. 2002 PI).

It is very important for expatriates who move into more *indirect* cultural domains to learn to read people's *non-verbal* signs and not only focus on the words that are spoken. Don, an American who worked in Latin America for many years, gave an illustration of the importance of reading *non-verbal* cues. He related that once he was with a German colleague, Klaus, and a local person named José. In their conversation, Klaus asked José a question, who responded with the word 'yes'. Klaus was thrilled with this response, but it later led to an argument between Don and Klaus. Don had learnt to read the local people's *non-verbal communication* and in this instance Don realized that José was clearly communicating 'no' even though he verbally said 'yes'. Klaus had only focused on the word that was spoken and not the larger context of the conversation: '*My German friend was quite upset that people*

would say one thing and mean another, but of course he was limiting his communication to verbal things, not picking up all of the non-verbal signals' (Don G. 2001 EI).

Knowledge about differences in *directness* can help expatriates to adjust, but they do not always become comfortable with these differences. Paul, a South African supervisor working in France, explained that it was easier for him to understand the people from his own cultural domain because they were more blunt and forthright: '*People in France are more difficult to suss out, you have to pay attention to things that are not verbalized, but which are felt in the atmosphere. It took me a long time to figure that out and I still struggle with it*' (Paul S. 2001 EI).

The concept of 'saving face', or not wanting to embarrass another person, is important in many *indirect* cultural domains. Sometimes 'inaccurate' information is given, not for the purpose of being deceitful, but rather to save someone from embarrassment. Bruce, an American teacher who worked in China, experienced this. He explained that in China it is necessary to be able to read between the lines. Once he was told that a student had to leave the school because someone in his family back home was sick: '*I found out later that the real reason that the student left, was that he was doing poorly and he did not want to bring disgrace to himself, and to me, his teacher*' (Bruce G. 2001 EI). It is important in situations like this to understand the cultural values in a new setting. In this case, someone's honour was more important than telling the exact truth.

The question of 'why certain countries prefer *high* or *low context styles of communication*' was not asked in the EIs, but one respondent volunteered an opinion as to why this may be the case. She explained that in the USA people are more *direct* and in Argentina people are more *indirect*. In her opinion this is due to the fact that Argentina is a more homogeneous society and the USA is a mix of many different kinds of people: '*Therefore, in the US you need to get a lot of information about a person before moving forward in a conversation, not taking anything for granted because there are so many variables*' (Erica B. 2001 EI).

4.2.5 Showing emotion during conversations

Both emotion and reasoning play a part in relationships and communication. This can vary significantly due to individual personalities, but there is a cultural dimension as well. In some cultural domains it is more admirable to keep one's feelings carefully controlled and subdued. This is referred to as a more *neutral* cultural domain. In other cultural domains, people are free to express emotion, raise their voice, cry, use gestures, laugh or use other facial expressions. They find an outlet for their feelings and admire it when others do too. This is referred to as a more *affective* cultural domain (see 2.5.2.3, Trompenaars 1994:63-72).

Affective and *neutral* preferences were described in EI-6 and participants were asked if they experienced a significant difference in this criterion between their home country and the country to which they moved. Of the 118 people who answered this question, 83% said that they did experience a significant difference.

It is important for expatriates to know which emotional behaviours are acceptable in their new country. This helps prevent misunderstandings and also helps them not to make fools of themselves. It also helps expatriates not to make a wrong interpretation or judgment about other people's behaviour. Brenda, an American trainer working in Italy, explained that Italians are generally much more *affective* than Americans. A higher level of emotion is tolerated in communication in Italy, both in personal and business situations. To her, Italians frequently sounded like they were fighting, because when they got excited they became louder and much more demonstrative: '*Italians don't mask their emotions, it's all right there for everyone to see. At first I found that embarrassing and tended to judge their behaviour as immature and unprofessional. Now I understand that's just the way they are*' (Brenda B. 2001 EI).

A person from a more *neutral* cultural domain, who moves into a more *affective* cultural domain, may need to adopt a more *affective* style if s/he wants to be taken seriously. Mark, a British manager who worked in Egypt, explained that the British are renowned for not showing emotion. In contrast, the Egyptians are typically very emotional in their communication. He learnt that he needed to become more *affective* when dealing with Egyptians. He realized that if he simply told someone that he disagreed with them, as he would have in England, but did not also show it with his tone and body language, they would

not believe that he really meant what he said. Once Mark was frustrated with some Egyptians who constantly attacked his religious beliefs, saying that the Bible had been altered. When he explained to them, in a quiet British way, that the Bible had not been altered, it had little effect. One day some of his friends said it again. This time he jumped up and walked out of the coffee shop and his friends came running after him asking him what was wrong: *'I told them they had insulted me by insulting my Scripture, and they immediately apologized. Only then did they finally get the message that this Book is really special to me and I really meant what I said'* (Mark H. 2001 EI).

Socially acceptable behaviour differs from country to country. An expatriate needs to understand the differences, but it is not necessary to personally adapt to every cultural difference. Charné, a South African medical doctor working in Mozambique, related that Mozambicans are more *affective* than people in her English South African cultural domain. In Mozambique, the women especially are very emotional when expressing their grief. They wail and shout loudly, throw dust on their heads, take their clothes off, (especially their blouses), shave their hair, etc. Joy is also very loud and expressive, the ladies use their tongues to shout 'lo-lo-lo', they dance, wave cloths and clap their hands: *'It doesn't bother me to watch them, but I would definitely not be comfortable participating!'* (Charné L. 2001 EI).

It is also important for expatriates to know which emotions are acceptable to express. Gerard, a French consultant working in the USA, related that in that country, positive emotions and affirmation are expressed more readily than in France, where negative emotions are more easily and quickly expressed: *'In France, a flash of anger with a few loud words is fairly common and not even a source of distress for anyone. This is much more uncommon in the US and would be taken more seriously here'* (Gerard A. 2001 EI).

4.2.6 Communicating disagreement

People in different countries show disagreement in various ways. Some people communicate disagreement by shaking their head back and forth, some say 'no' (or the equivalent of 'no' in their language) *directly* and others do it very politely or *indirectly*. The participants were asked how disagreement was shown both in their home country as well as in the country to

which they moved. Of the 112 people that answered this question, 80% stated that there was a difference.

Disagreements happen often when ideas are exchanged and decisions need to be made. It is important for expatriates to learn to disagree in a way that other people will understand them, but not be offended. Expatriates who are not used to the more *direct* style of communication (see 4.2.4) sometimes struggle emotionally when others disagree *directly* with them. Brenda, an American working in Italy, explained that Italians have no problem expressing disagreement. They tell others very *directly* if they do not agree, and the way the Italians say ‘no’ bothers her: *‘They use a very sharp intonation and often click their tongue and shake their index finger as well. It feels like shaming a young child for doing something wrong and it really upsets me emotionally’* (Brenda B. 2001 EI).

Cindy, an Australian journalist and photographer who worked in Spain, had a similar problem. She explained that in her circle of friends at home in Australia, disagreement would usually be communicated in a diplomatic, tolerant way. They would say things like, ‘I’m not sure if I totally agree with you on that,’ and it would be spoken in a calm, gentle manner. In Spain, on the other hand, it is acceptable to communicate disagreement more strongly. They would say things like *‘No way! I don’t agree with you at all, you are totally wrong, I can’t even believe that you could even say that!’* It would often be spoken in a loud, strong voice with appropriate hand gestures. *‘It was hard for me to get used to that without feeling offended!’* (Cindy H. 2001 PI).

The opposite adjustment can also be difficult for expatriates. Those who are used to being more *direct* will offend other people if they do not learn to express disagreement in a more socially acceptable way. Silke, a German woman, had difficulties learning to express disagreement with people from the USA. She said that in Germany, she used a *direct* ‘no’ when she disagreed, or *directly* told the other person that they were wrong. Sometimes she even gave factual arguments to substantiate her disagreement: *‘In the US, I have to be less direct to avoid offending people. I will sometimes change the subject, not say anything at all, or excuse myself by saying that I am in a hurry or have a previous engagement’* (Silke A. 2001 EI).

Another example of having to adjust to a more *indirect* style of disagreeing came from Mark, a British manager who worked in Egypt. He explained that in the UK, people disagreed by shaking their heads, *directly* saying ‘no’, changing the subject, or by telling a story that highlights the problem. It would also depend on the situation and how well you knew the person. In Egypt people rarely say ‘no’ *directly*. ‘No’ will rather be communicated by saying ‘if God wills’, ‘maybe’, or repeatedly stating the difficulties involved. ‘*Another method used in Egypt to avoid confrontation, is simply to not turn up as agreed or indirectly by telling a mutual friend why something will not work, without directly telling the person involved*’ (Mark H. 2001 EI). Unless one understands what the other person is trying to communicate, and that in some cultural domains it is socially acceptable not to show up for an agreed appointment, a foreigner can become very frustrated and angry.

Mark’s point about showing disagreement differently depending on the situation should be highlighted. Most people will show disagreement differently in a business meeting with a potential client, than with their partner on a romantic date. Nevertheless, there are cultural norms that one tends to follow, which is being addressed in this section.

Another difficulty faced by expatriates who live in a more *indirect* cultural domain than where they came from, is knowing when a person’s ‘yes’ really means yes. Mariska, a South African who lived in Botswana, said that the Tswana people would not *directly* say ‘no’ to a foreigner or to someone in a higher position. Once she asked her gardener if he could come and work for her the next Saturday and he said yes. Saturday came and he did not arrive. She explained that she would not have been upset if he told her that he could not come, as then she could have organized something else: ‘*I was upset, however, when he said he would come and then he didn’t come. I never did learn how to get a negative answer out of workers there*’ (Mariska K. 2001 PI).

One last misunderstanding mentioned by participants, was how silence is interpreted in group situations. In some cultural domains, in a group situation, silence after someone makes a statement, means agreement. In other cultural domains, silence means disagreement. Stephanie, a German missionary working in Burkina Faso, shared that this caused problems for them. In Germany, people respond with *silence* in a group situation if they *agree* with what has been said and they speak up if they *disagree*. The opposite is true in Burkina Faso. If people in the group *do not respond*, it means that they *disagree* with what has been said.

They only respond verbally if they *agree*. Expatriates working in Burkina Faso often misunderstand *silence* in the group as *agreement* and this can lead to confusion: ‘*One expatriate worker in Burkina Faso explained to his African colleague how he wanted a certain project to be conducted. The African didn’t agree and kept quiet. This silence was misinterpreted as agreement and there was total confusion*’ (Stephanie R. 2001 EI). This group dynamic would be very helpful for expatriates to realize, in order to correctly interpret the feelings of the group.

4.3 NON-VERBAL COMMUNICATION

A large part of communication includes *non-verbal* cues. Fons Trompenaars states that ‘*research has shown that at least 75% of all communication is non-verbal*’ (Trompenaars 1994:69). These *non-verbal* cues can have different meanings in different cultural domains. A frequently used example is that of eye contact. In some cultural domains, looking someone directly in the eye is a sign of honesty and interest. In others, it is an act of disrespect and defiance to look an older person in the eye.

In EI-7, eight *non-verbal* cues were listed. The participants were asked to give a brief description of how the meaning of these *non-verbal* cues differed between their home and new cultural domains. Figure 4.1 shows the responses to these different aspects of *non-verbal communication*, as well as the percentage of people who said there was a difference in each area. This will be followed by some examples given by participants in each category.

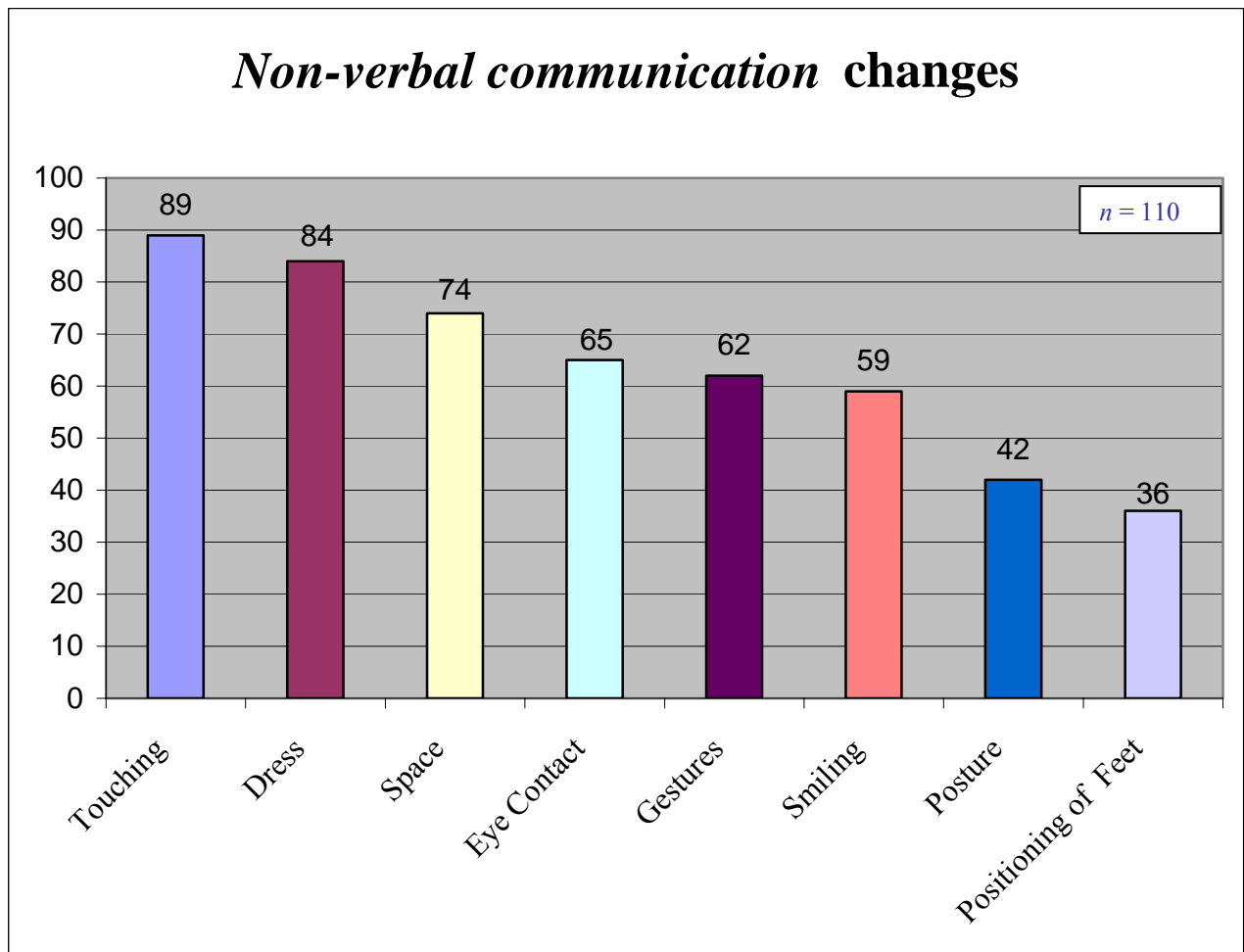


Figure 4.1 *Non-verbal communication changes*

4.3.1 Touch

Figure 4.1 shows that 89% of participants stated that in moving from one cultural domain to another, there was a difference in the cultural norms regarding people touching one another. Many of these responses were differences in greeting people and the appropriateness of touching someone of the same and the opposite sex.

Participants who come from cultural domains where kissing and touching someone of the same sex is taboo, felt uncomfortable when people of the same sex touched them in the new country. This happened to several participants who initially wondered whether the other person was making a sexual advance. Joe, an American working and living in a multi-cultural setting in South America, related that his Latino colleagues were more *affective* and physical than he was used to. They were not too inhibited to cry in front of him, laugh or be loud, and

they even kissed and hugged him. Joe was quite dumbfounded and shocked when a man from Argentina kissed him on the cheek: *'Only later I realized that that was part of their culture. Once I got used to this aspect of showing affection I didn't mind, but I did misinterpret it as a sexual advance at first'* (Joe S. 2001 EI).

It is sometimes difficult to determine the intentions of other people even within one's own cultural domain, but when people interact with others from a different cultural domain where there are so many unfamiliar cues, the level of discomfort can be quite high. Martin and Cathy, an American couple who teach in Laos, explained that two women who are close friends in Laos touch each other often and hold hands, as do men who are close friends. In the USA, this same contact could be interpreted as a sexual advance. Martin explained that the affection between the men in Laos at first was very shocking to his system. He described himself as a 'very touchy feely kind of a guy' and he even makes other men in the USA feel uncomfortable. But in Laos, the men pat one another's bottoms, rub one another's arms and hold hands as they talk: *'It is perfectly natural to them, but it sent me through the roof at first. Now I have adjusted, as I realize it is not a sign of a sexual advance'* (Martin and Cathy B. 2002 PI).

In most Western countries, a husband and wife can hold hands in public, but in other countries this is not socially acceptable. This can be a difficult adjustment for an expatriate. Morné, a South African working in Turkey, shared his difficulty in adjusting to the fact that it was inappropriate for him to touch his wife in public. At home he was used to holding hands with her, *'but in Turkey you can only hold hands in public with someone of the same sex, which I don't want to do. It is inappropriate for couples, even married ones, to walk holding hands in some parts of Turkey'* (Morné D. 2001 EI).

Expatriates need to decide how much they want to adapt their behaviour to 'fit in' in their new country. Most expatriates do make changes and some also try to influence people in their new country to adapt to them. Denise, a Filipino woman who married a British man and moved to the UK, explained that she is very tactile, as are most people from the Philippines. When she first moved to the UK, she was very uncomfortable when people greeted her without using any physical contact. A few times when she was introduced in a business setting, the British women stared at her outstretched hand without offering their hand in reply. If they did shake her hand, their grasp was very weak and limp. She explained that in the

Philippines people often kiss each other and close friends of the same sex walk around holding hands. In the UK she missed the physical contact that she was previously used to and has now influenced the people she knows to kiss her when they meet: *'Almost all my British friends, male and female, kiss me now, regardless of whether they were comfortable with it before or not'* (Denise N. 2001 EI).

4.3.2 Dress

Learning the social norms regarding dress is important; expatriates, people travelling on business and even people on holiday are well advised to learn what is culturally appropriate. Pamela, a South African working in Mozambique, explained that ladies in Mozambique wear dresses that must cover their knees: *'It is sexually impure for a woman in Mozambique to show her knees, but she can openly breastfeed in public. In South Africa, a woman cannot show her breast in public, but showing her knee is no problem'* (Pamela B. 2001 EI).

The importance of one's style of dress can help expatriates to get the results they want. Brenda, an American trainer working in Italy, illustrated this point. She explained that Italians tend to dress very well, especially in the north. They are very appearance orientated and will make a judgment about someone strictly on the basis of how they are dressed: *'In the north, especially in a business context, it is important to dress well and to wear status brands if you want to sell your product'* (Brenda B. 2001 EI).

Knowing what the local status symbols are can also help an expatriate in everyday life. Jonna, a Swedish woman who lived in Egypt, explained that in Sweden they have a saying, *'As you are dressed, so you will be treated'*. In Egypt it is also very important to dress nicely if you have any official business to do, and *'gold jewellery shows that you have money and influence and can even earn preferential treatment in offices and shops'* (Jonna H. 2001 EI).

4.3.3 Personal space

Anthropologist Edward T. Hall studied people's use of space in various kinds of interactions, which varies with different degrees of intimacy and in different cultural domains. Hall identifies four spheres of personal distance with which middle-class Americans surround

themselves, namely: Intimate distance (0-18 inches), Personal distance (18 inches to 4 feet), Social distance (4-12 feet) and Public distance (12-25 feet or more) (see Hall 1966:119-125). Hall also writes that olfaction plays an important part in the Arab way of life, and it is one of the distance-setting mechanisms. Arabs consistently breathe on other people when they talk: *'In a word, the olfactory boundary performs two roles in Arab life. It enfolds those who want to relate and separates those who don't'* (Hall 1966:160).

In this study, the Americans and expatriates who moved to the USA made the most comments. Inez, a Spanish university lecturer working in the USA, explained that in Spain, close physical proximity is a sign of friendship and is socially acceptable: *'Americans seem to need a bigger space, they will clearly distance themselves if you come too close'* (Inez A. 2001 EI).

Gerard, a Frenchman living in the USA, also noticed that people's personal space is much larger in the USA and Anglo-Saxon countries than what he was used to. French people speak more softly anyway, but because they tend to stand closer together they can still hear each other: *'I got used to the bigger personal distance in the US, and now I have to consciously adapt when I go back to France for a visit'* (Gerard A. 2001 EI).

It is beneficial for expatriates who move to the USA to understand this. An Israeli professor working in the USA said that personal space in Israel is much closer than it is in the USA: *'Americans usually feel that Israelis are "too much in their face" and Israelis often perceive Americans as cold and distant'* (Amaia B. 2001 EI).

Americans who relocate also need to get used to less personal space in many other countries, otherwise they may feel that their privacy is being invaded. Michelle, an American woman who lived in Nepal, commented that there was no 'bubble' of personal space that was respected in Nepal. In the USA, one would not violate another's personal space, except under unusual circumstances, like on a crowded bus. Even then, an apology would be made. In Nepal, it is considered normal to be close to the person you are speaking to. She noticed that even strangers who are waiting in a room with much open space sit right next to each other. *'In a bank or store, if there was a line at all, the people would be standing close enough to be touching each other, which bothered me, especially at first'* (Michelle R. 2002 PI).

It was clear from the responses received that in the USA people tend to want more personal space. But according to Rachel, a teacher from Germany working in Japan, the Japanese have even made personal space official. She said that there are strict rules about personal distances that need to be observed. The office ladies with whom she worked even explained these to her in terms of metre per rank! *'For example, with a Chief Administrator you must stand 2 meters away (I can't remember the exact distances anymore, but these rules were even written in the company handbook!)*' (Rachel F. 2001 EI).

4.3.4 Eye contact

As mentioned in Section 4.3, the meaning of direct eye contact can differ from place to place. For example, in Germany children are taught both verbally and also by modelling, to look into other people's eyes when they talk to them. This is a sign of respect and it also shows that they are paying attention: *'In many African countries children are taught that to look directly into an adult's eyes is a sign of disrespect. They must look down to show respect'* (Fritz D. 2001 EI).

The appropriateness of eye contact can also be gender related. In the UAE, it is not appropriate to have eye contact with someone of the opposite sex, but with someone of the same sex it is acceptable. One British woman working in the UAE found this very difficult. She expressed that in the UK, if someone avoids direct eye contact, the person is considered dishonest, shifty or that they have something to hide: *'I still have a difficult time not looking into the eyes of the men I come in contact with, but I don't want to give them the wrong idea'* (Julie B. 2002 PI).

4.3.5 Gestures

An innocent gesture in one country can be considered extremely rude in another (see Mitchell 2000:81). To avoid embarrassment and offence, expatriates would do well to learn which gestures are offensive when moving to another country. An example of this is that the 'thumbs up' sign, which is often used in the USA, is considered vulgar in Brazil (Eileen B. 2001 EI).

Expatriates will soon learn some of the more common gestures, but it can be confusing until they do learn them. One Welshman commented, *'It was confusing for me that in India, a head movement from side to side means "yes" because I am used to that meaning "no"!*' (Frank D. 2001 EI). Pam, an American who was working in China, gave another example. She was once misunderstood when she put her thumb and first finger together in a circle, to give the 'OK' sign: *'In China that means that someone needs to use the restroom'* (Pam F. 2002 PI). This same gesture is considered vulgar in Spain, Russia, Paraguay, Brazil and Uruguay, and is a threat of bodily harm in Tunisia (see Mitchell 2000:85).

Knowing local gestures can be advantageous in everyday life. Mark from the UK explained that in Egypt, if you flick your right thumb forward over your front two teeth, it means that something is too expensive. Knowing this gesture saved him a lot of money because the sellers figured that if he knew this very colloquial gesture, then he must also know what the real price should be: *'It was also fun for the Egyptians to see a foreigner who knew some of their culture and I became a bit more of an insider with them'* (Mark H. 2001 EI).

4.3.6 Smiling

In most Western countries, smiling is usually an expression of happiness, joy or delight. In Asia, however, smiling can also be a cover up for other emotions. Cathy, an American teaching in Laos, explained that in Laos, people smile when they are happy, but they also smile or laugh nervously when they are embarrassed or angry. In contrast, Americans smile when they are happy, but do not usually disguise their anger or sadness by smiling (Cathy B. 2002 PI).

An innocent smile in the wrong cultural domain can have undesirable consequences. In the USA, women can freely, and without problem, smile when greeting men, even in a casual setting such as thanking a clerk in a store: *'But this same smile could be taken as a sexual invitation by Middle Eastern men'* (Don G. 2001 EI).

4.3.7 Posture

Posture can play a role in the way people show respect and this is expressed differently in different cultural domains. Matthys shared that in South Africa, standing up for someone who enters a room shows respect. In contrast, *'in Mozambique you show respect by sitting down and putting yourself at a lower level than the other person'* (Matthys L. 2003 EI).

Bowing is important in many countries in Asia (see Mitchell 2000:52, 53). Don, from the USA, said that in Thailand and Myanmar, people tend to bow or slouch when passing others as a sign of respect, keeping the level of their head below the other person's head. In contrast, bowing is not used in greeting in the USA and other countries in the world where he worked (Don G. 2001 EI). *'In Japan, it is the relative depth of a bow that communicates difference in status. The lower you bow, the more honour you are showing'* (Denise N. 2001 EI).

In some cultural domains, posture is also important for a public speaker. Gerard from France, who studied in the USA, gave an example: *'I was very shocked when I saw a professor sit on her desk on the last day of class. I had a lot of respect for her but she lost most of it by adopting such a casual attitude on the last day'* (Gerard A. 2001 EI).

The difference in what is preferred and appropriate regarding posture is seen in the following example between the USA and Laos. *'In Laos, men and women squat low to the ground when they want to have a nice, leisurely conversation. In America people sit on chairs'* (Cathy B. 2002 PI).

4.3.8 Position of feet

Many respondents either wrote a question mark in response to this question or said that they did not know what was meant by it. Unless one has had experience in Middle Eastern, North African or some Asian countries, this question would not make much sense. In these countries, it is highly offensive to show the sole of one's foot or the sole of one's shoe to someone. *'This is because the sole of the foot is the lowest part of the body and something which is usually dirty and soiled'* (Mitchell 2000:98). Mark, from the UK agreed, stating that, *'In Arab culture, feet and shoes must be kept flat on the floor. Crossing your legs (American*

style) is also taboo and disrespectful, as the soles of one's feet or shoes can be seen' (Mark H. 2001 EI).

Making a faux pas, even out of ignorance, can have dire consequences. The following example illustrates how knowing about a taboo gesture would have been very helpful. Hendrik from South Africa, who was working in the Middle East, said that the soles of one's feet should not be seen during a meal and definitely not shown towards one's host during a conversation. He wrote that once Billy Graham visited King Hussain of Jordan and the event was broadcast on local television. Unfortunately Mr Graham crossed his legs and had his feet facing towards the King most of the time: *'His whole message was lost in the angry feelings of the nation, what a way to treat their King, showing open contempt!'* (Hendrik V. 2002 PI).

CHAPTER 5

CULTURAL ADAPTATION

5.1 INTRODUCTION

Expatriates need to make many adjustments, both in their work and social environments, when moving from one country to another. This chapter will deal with the process of cultural adaptation. Most expatriates go through stages of adjustment, which are described in the literature and are even illustrated with diagrams. These are very helpful in giving expatriates a basic framework to help them understand some of the things that may happen to them. In reality, however, their experiences are complex and do not fit neatly onto a graph. Nevertheless, this framework is a useful point of departure.

It is very important both for expatriates and the company or organization that they work for, that the expatriates and their families adapt well to their new *cultural domain*. Storti quotes the Windham International survey, which identified the three leading causes of failure in an expatriate episode: *'partner dissatisfaction, family concerns, and the inability to adapt. All three causes, and especially the inability to adapt, suggest that successfully crossing cultures is a major challenge for most expatriates'* (Storti 2001a:xvi.). L. Robert Kohls has lived, worked and travelled in more than 90 countries and is cited as one of America's leading interculturalists. He writes, *'The success rate of overseas adjustment among Americans is not nearly so high as it might be. If left to luck, your chances of having a really satisfying experience living abroad would be about one in seven'* (Kohls 2001:1).

It is no wonder that companies are paying thousands of dollars (or the equivalent) to provide their expatriate employees with cultural training and assistance. Many religious organizations require their missionaries to receive cultural training. Even universities provide foreign students with information and support regarding cultural adjustment. For example, the Council for International Education in the UK has published a pamphlet for international students called *International Students and Culture Shock* (UKCOSA 2004). It seeks to help foreign students understand the dynamics of cultural adaptation, to give them guidance and practical advice on how to adjust well, and to give them information regarding where they can find additional help.

5.2 EXPATRIATION ISSUES

5.2.1 Stages of cultural adaptation

Anthropologist Kalvero Oberg (1960:177-182) was one of the first people to use the term ‘culture shock’. He also described four different stages of cultural adaptation. In other literature and articles, this process is described using a varying number of stages. The UKCOSA (2004) pamphlet (see Section 5.1), for example, describes five stages. In this study, the 3-stage model developed by Marx (1999:7-11) will be used as the basis for interview questions. These stages are the *honeymoon stage*, *culture shock* and the *adjustment stage*.

During the first stage or *honeymoon stage* of relocating to a new country, everything is new and exciting and it is easy for expatriates to overlook the irritations and difficulties that they may experience. In the second stage, *culture shock*, the expatriates feel disorientated and their negative feelings and discomfort becomes overwhelming. Oberg described *culture shock* as hostile feelings towards the locals, which grows out of the difficulties that expatriates feel in their process of adjustment. ‘*There is mail trouble, school trouble, language trouble, house trouble, transportation trouble, shopping trouble, and the fact that people in the host country are largely indifferent to all these troubles*’ (Oberg 1960:178). In the third stage or period of *adjustment*, expatriates begin to accept and adapt to the customs and ways of doing things in the new country.

In EI-9, this 3-stage cultural adjustment pattern was briefly described. Participants were asked if this pattern was similar to their own experiences. Almost three quarters (73%) of the participants commented that they experienced a similar adjustment pattern; 14% said that they experienced a variation of this pattern; and 13% said their experience was unlike this pattern.

It is important to note that difficulties and adjustments occur in *everyone’s* life. Expatriates, however, have more adjustments to make than if they would have stayed in their own country. Several participants mentioned that one crucial part of their adjustment process was figuring out how things were done in the new cultural domain. Rachel, from the UK who lived in Japan, expressed that the most difficult thing for her was not just accepting new rules, but rather finding out about them in the first place. She remarked that the Japanese are either

reluctant or unable to explain the societal and work rules of etiquette, but commented that perhaps the British would be too: *'This information gap unfortunately makes small things (such as dress code, rules about punctuality, who can speak when, or what your answer to a question "should" be) turn into big issues'* (Rachel F. 2001 EI). Cathy, an American teacher living in Laos, agreed. She said that the stressful part for her was that there were many rules but she did not know what they were until she had already broken them: *'It is like playing baseball and having to learn the rules during a game situation'* (Cathy B. 2002 PI).

Two examples will be given to illustrate this 3-stage pattern. David, an American manager working in Malaysia, said that he definitely experienced the 3-stage pattern. When he first arrived in Malaysia, he was very excited about living in a country that was so different from his own. There was a nice beach and a swimming pool nearby and he also had plenty of time to read books and relax. But after about a month he was tired of sitting by the pool, he noticed that the beach was always littered with trash, and he became tired of being alone. Over the next few months he gradually accepted his situation and began to adjust: *'Only then did I start to spend more time with friends. I also forced myself to try different places to eat. By the end of one year, I was fairly well adjusted to life in Malaysia'* (David W. 2001 EI).

Some participants were able to recognize the stages clearly. Mark, an Englishman who lived in Egypt, remembered the stages of his cultural adjustment well. For him, the first stage lasted about six months and came to an end through a personal mini crisis, which threw him headlong into the second stage: *'I experienced culture shock for about two weeks until I re-engaged with the culture through local novels and a good local friend I had made. I eventually widened the circle around me and adjusted well'* (Mark H. 2001 EI).

Living and working in a war or crisis situation can mask the difficulties faced during the transitioning process. Three participants, a married couple and a single woman, fit this profile and they all said that they did not have time to think about their struggles and adaptation process. The first was a South African couple with a small child who worked in Mozambique during the Mozambican civil war. They were responsible for a team of expatriates and Mozambicans and they experienced many difficulties during this formidable time: *'There was no time to think about our struggles, we were only trying to survive'* (Ronald R. 2001 EI).

The other example was Janice, an American nurse who worked in Northern Iraq for four years during the crisis in the 1990s and then moved to Turkey. She said that she did not experience these stages during her time in Iraq. She felt that this was largely because she worked in a relief and development situation, she still functioned in her professional role in the medical field, and she was well respected in Iraq.

But when Janice moved to Turkey, there was no political crisis and this time Janice did experience the 3-stage adjustment. Her *honeymoon stage* was short, which she attributed to the fact that the cultural milieus in Turkey and Northern Iraq are relatively similar. She felt that her *culture shock stage* in Turkey lasted a long time and she experienced a lot of anger and irritations. At the time of this interview, which took place after she had been living in Turkey for three and a half years, she felt that she was beginning to move into the *adjustment stage*. She expressed that she still got angry more easily and to a more noticeable degree than she ever did in her home country. For example, once she took her friend, who had a 6-week old baby, to the hospital. They were first in the queue waiting to get into a lift at the hospital. While they were waiting for the people in the lift to come out, some men pushed through the crowd from behind them and Janice and her friend ended up as the last ones to get into the lift. In the lift Janice gave the men a lecture about how rude, inconsiderate and disrespectful they were of women and children, which lasted all the way to the seventh floor: '*Later I felt very embarrassed by my reaction and I thought of better ways that I could have handled the situation. I just get so angry when men treat women and children like that*' (Janice I. 2002 PI).

There were several participants whose experiences deviated from this pattern in that they seemed to have skipped the *honeymoon stage* altogether. One example was Brenda, an American woman, who experienced *culture shock* as soon as she arrived in Italy. She felt that this was largely because she was having trouble with her new boyfriend at the same time. She also held that in her opinion, cultural adjustment could not be neatly divided into three parts. She felt that her process of adjustment moved through the stages in a more cyclical way, repeating the stages at different levels as she tried new things and encountered new situations. She also was not sure about the last stage of acceptance and integration. At the time of her EIs, she had been living in Italy for eight years and felt that she had integrated to some degree, but that there are things in Italy that she will never accept, no matter how long she

lives there: ‘*My ability to live here, despite the fact that there are certain things that I cannot accept, might however be called adjustment*’ (Brenda B. 2001 EI).

Pam, an American English teacher working in China, also said that her adjustment process was of a cyclical nature and that she did not think that the *adjustment stage* is a final point that is reached. She felt that the more different the new cultural domain is from one’s home, the more times a person actually goes through the *honeymoon*, *culture shock* and *adjustment* cycle. As expatriates stay longer in a country and work their way deeper into their new social environment, new experiences and things they learn create additional cycles. ‘*I also think there is a fatigue period that hits sometimes, which is also a part of the cycle and which takes you back through at least phases two and three*’ (Pam F. 2002 PI).

As was stated in the introduction to this chapter, the expatriate experience cannot be summed up into neat categories because real experiences are both complex and messy. A cyclical pattern would probably be more accurate, but would be more difficult to illustrate. Western thinking is very linear, as are Western models, which limits their effectiveness. They are useful, however, as a point of departure from which to explain the complexities of the real experience.

Each individual is unique and some personality styles cope better with change; these people enjoy the excitement of new things and often get bored with routine. One Filipino woman, Denise, expressed that her personality style helped her in adapting to life in Japan, which for her was like playing an analytical game. She enquired about everything and often tried to behave in the manner expected, at least when it suited her. She noticed that in many instances, clearly showing that she was a *gai-jin* (foreigner), absolved her of the consequences of many of her cultural transgressions. She experienced the *honeymoon* and *adjustment stages*, and although she did not go through a prolonged period of *culture shock*, she did experience situations that upset her tremendously. Her initial reaction to these situations was anger, frustration and crying, but then she sat down to figure it out. Her endgame was to find explanations for situations that she did not understand, and when she achieved understanding, she was pleased with herself, even if the offending behaviours and underlying values were totally dissonant with her own: ‘*To me, “winning” was understanding, not necessarily conforming*’ (Denise N. 2001 EI).

Denise illustrated this with the following example: She lived in a women's dormitory, which was managed by a dormitory mother. The dormitory could be reached by walking through a somewhat thickly wooded area. The dorm mother told the women that her rule was that all of the residents had to be inside the dorm by 10 pm on weekdays. The rationale she gave was that the woods might be unsafe to walk through after 10 pm. One weeknight, an American girl and Denise went out on a double date with two boys from the men's dorm, which was located on the other side of the woods. The boys walked the girls to their dorm just before 10 pm. The four of them sat on the front steps in front of the glass-door entrance and carried on chatting because they thought that the 'danger' of walking through the woods was past and the dorm mother could clearly see them on the front steps talking. The next thing Denise knew, the dorm mother walked towards the glass door, smiled and locked them out.

Denise was very puzzled. The dorm mother had used 'safety' as the rationale for her rule about being inside by 10 pm, but then she put the girls into an unsafe situation, by locking them out. The girls knocked on the door and asked her to let them in, but the dorm mother simply smiled, bowed and stayed inside. She then walked backwards and forwards in front of the glass door, making it obvious that she was purposely ignoring them. Denise felt that if the dorm mother had told them that they needed to be inside the dorm by 10 pm, with no exceptions, they would have behaved differently. But Denise was reacting to the dorm mother's concern about their safety more than to the rule itself. In the end, the dorm mother stood inside and watched through the window as the two girls climbed the fire escape, knocked on the nearest bedroom window with a stick, teetered on the railing and performed the death-defying act of stretching themselves dangerously from the second floor fire escape into the window – obviously with no net.

As soon as they got inside the dorm, Denise stomped downstairs and asked the dorm mother to explain her behaviour, but all the dorm mother did was ask her if she had a nice evening out. She did not explain herself, so Denise asked her Japanese roommate to explain the situation to her. She was told that when someone in authority makes a rule, it must be followed. The authority figure sometimes gives a reason, but people are not meant to listen to the reason, just to obey the rule. Denise has always questioned the validity of rules and still today only follows rules that she considers to be valid. In Japan, she understood and behaved as was expected, but she never conformed inwardly: *'I adjusted outwardly, but chose not to*

integrate in the fullest sense of the word. Taking a pragmatic attitude enabled me to appreciate the culture without being sucked into it' (Denise N. 2001 EI).

5.2.2 Culture shock

Experiencing *culture shock* is difficult and the many negative emotions that accompany *culture shock* can be frightening. Sometimes expatriates feel that if they experience *culture shock*, they are weak or that they have made a mistake by moving to a different country. *'It is a myth that experiencing culture shock is a weakness or a negative indication of future international success. Culture shock in all its diverse forms is completely normal and is part of a successful process of adaptation'* (Marx 1999:5).

The timing and experience of *culture shock* is variable. It can happen soon after arriving in a new country or it can happen months later with varying duration. While some people do not experience this period of difficulty in adjusting, most expatriates do experience it to some degree. In this study, 87% of the 110 participants who answered the question did experience *culture shock* (see 5.2.1).

Expatriates can also experience *culture shock* when they move into a different *corporate* cultural domain. Pirkko, a manager from Finland, was working in the multicultural UAE. She worked for two different companies in the UAE and she experienced *culture shock* at the beginning of both of her jobs. The first company she worked for was an Indian company and she had to adapt to the 'Indian culture' at the same time she was adjusting to living in the 'Arabic culture' of the UAE. The second time she experienced *culture shock* was when she changed jobs to work for a German company in the UAE. The second one was unexpected, because *'after the Indian culture, German seemed so close to my own culture. It has been tough, mainly because it took me by surprise. In adjusting to the German culture I didn't have a honeymoon stage, I went right into difficulties'* (Pirkko S. 2001 EI). It is important to note that the expectations of expatriates also play a role in their ability to deal with *culture shock*, as will be seen by the next example.

Sometimes when two cultural domains are similar, expatriates do not expect to have many difficulties when they move from one to the other. But even small differences can cause

problems, especially when they are unexpected. Don, an American who grew up mostly in Latin America and had lived in several countries around the world, expressed that he did not experience *culture shock* when he moved to Cyprus, nor to the UK. He did, however, experience *culture shock* seven years ago when he moved to Spain: '*I think the culture shock hit me harder because subconsciously I assumed that life in Spain would be more similar to Latin America (where I grew up) than it turned out to be, and I wasn't expecting that*' (Don G. 2001 EI).

Moving to a different cultural domain within the same county can also be stressful. Kevin, an Irishman, expressed that he suffered from *culture shock* twice in France. He first lived in the northern part of France and then he moved to Strasbourg, which is in the eastern part. He was not expecting much of a cultural difference, but it turned that there was a big difference. He found it much more difficult to make friends in Strasbourg which was unusual because in general he felt that he made friends very easily (Kevin O. 2001 EI).

Some expatriates said that they actually 'fit better' into their new cultural domain. One example that clearly illustrated this was Cathy, an American teacher who had been living in Laos for three years at the time of this interview, articulated that she had yet to experience *culture shock*. She felt that she never really fit in in the USA. She expressed that she was not a consumer and was not into sports, entertainment, retirement or getting ahead. She described herself as a simple person and she felt right at home in Laos: '*I am intuitive, so even the language barrier has not bothered me. I have had bad days during the past three years, but none of it was related to culture stress...I love this culture*' (Cathy B. 2002 PI).

5.2.2.1 Experiencing negative emotions

It is good for expatriates to be aware of their emotions, as this can help them work through the transitional dynamics of adaptation. While it is normal to experience negative feelings, expatriates often think that there is something terribly wrong with them when they do. Many expatriates are high achievers and are used to success. They fail to understand that negative feelings are a part of the growth and adjustment process. Expatriates-to-be will find it very useful to be aware of and understand the negative emotions that they may experience during a period of *culture shock* (see Marx 1999:5-6, 20-31).

In EI-9, participants were asked what their strongest negative emotion was during the *culture shock* stage. They were also asked what they felt their spouse and children's most negative emotions were. They were not given options to choose from so as to not limit their answers. Most respondents just named their negative emotions without giving details. Their answers were evaluated and grouped into three categories: Inner turmoil; Negative feelings towards their new environment; and Feeling alone.

Out of 105 expatriates who answered this question, 158 responses were given, as some people gave more than one answer. Figure 5.1 illustrates these results. The figures shown at the top of each bar are the percentages of participants who gave an answer in that particular category, therefore the percentages add up to more than 100.

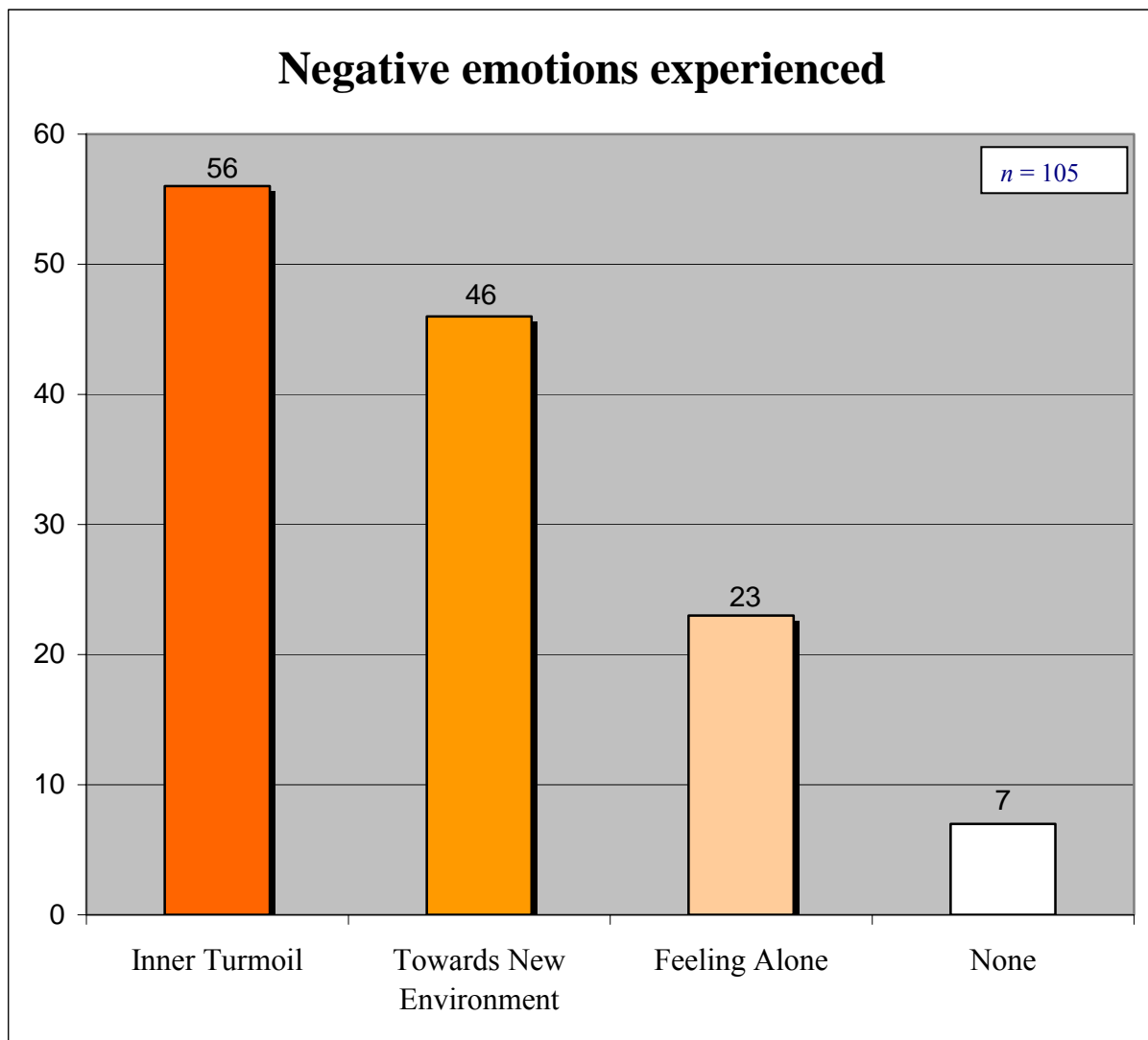


Figure 5.1 Negative emotions experienced

In the first category, 'Inner turmoil', many participants responded that they felt fearful and anxious. Several participants also mentioned feeling very depressed and frustrated. One example came from Silke, from Germany, who alleged that her strongest negative emotion was depression, *'and a very strong sense of "wanting out" and to get away from all the Chinese'* (Silke A. 2001 EI). Pam, from the USA who was working in China at the time, said, *'My strongest negative emotion was depression, a sense of helplessness and hopelessness, and also a fear that I wouldn't be able to make it in this culture'* (Pam F. 2002 PI).

Almost half (46%) of the participants felt negative emotions that fit into the category 'Towards new environment'. Participants mainly felt angry and judgmental towards the local people, frustrated with their new circumstances, and just wanted to be left alone. Fritz, from Germany, said that he arrived in a completely strange environment in West Africa. He could not understand the language that was spoken there, but the locals could understand him. He was not able to find the people he was supposed to contact and it was raining cats and dogs: *'If you had offered me a flight straight back home I would have accepted it'* (Fritz D. 2001 EI).

Bruce, from the USA who worked in China, shared his struggles. He was angry that the apartment he was given was in shambles, was dirty and only a few things in it actually worked: *'I was also frustrated with the language barrier and there was no one to help us, even though that was a part of my contract with the school!'* (Bruce G. 2002 PI).

The third category was 'Feeling alone'. Participants mentioned feeling lonely, isolated, not accepted, misunderstood, homesick and that they did not belong. Jeff, from the USA who was living in South Korea, commented that he has a strong need to belong: *'In Korea I felt that I was treated like an alien and I feared that I would never be accepted as an equal'* (Jeff I. 2001 EI). Joe, from the USA, shared his feelings when he was living in Belgium at the age of 27: *'I felt like a helpless little street child in a big city with no parents or anyone else who cared. I was lonely, isolated and scared'* (Joe S. 2001 EI).

Working expatriates face different challenges than those of their non-working spouses who have accompanied them and therefore their emotional reactions are also different. The responses received regarding negative feelings were sorted according to whether the expatriate was a working or a non-working spouse. Figure 5.2 gives the breakdown of these

results. Included were responses regarding 119 workers, 36 non-working spouses and 30 children.

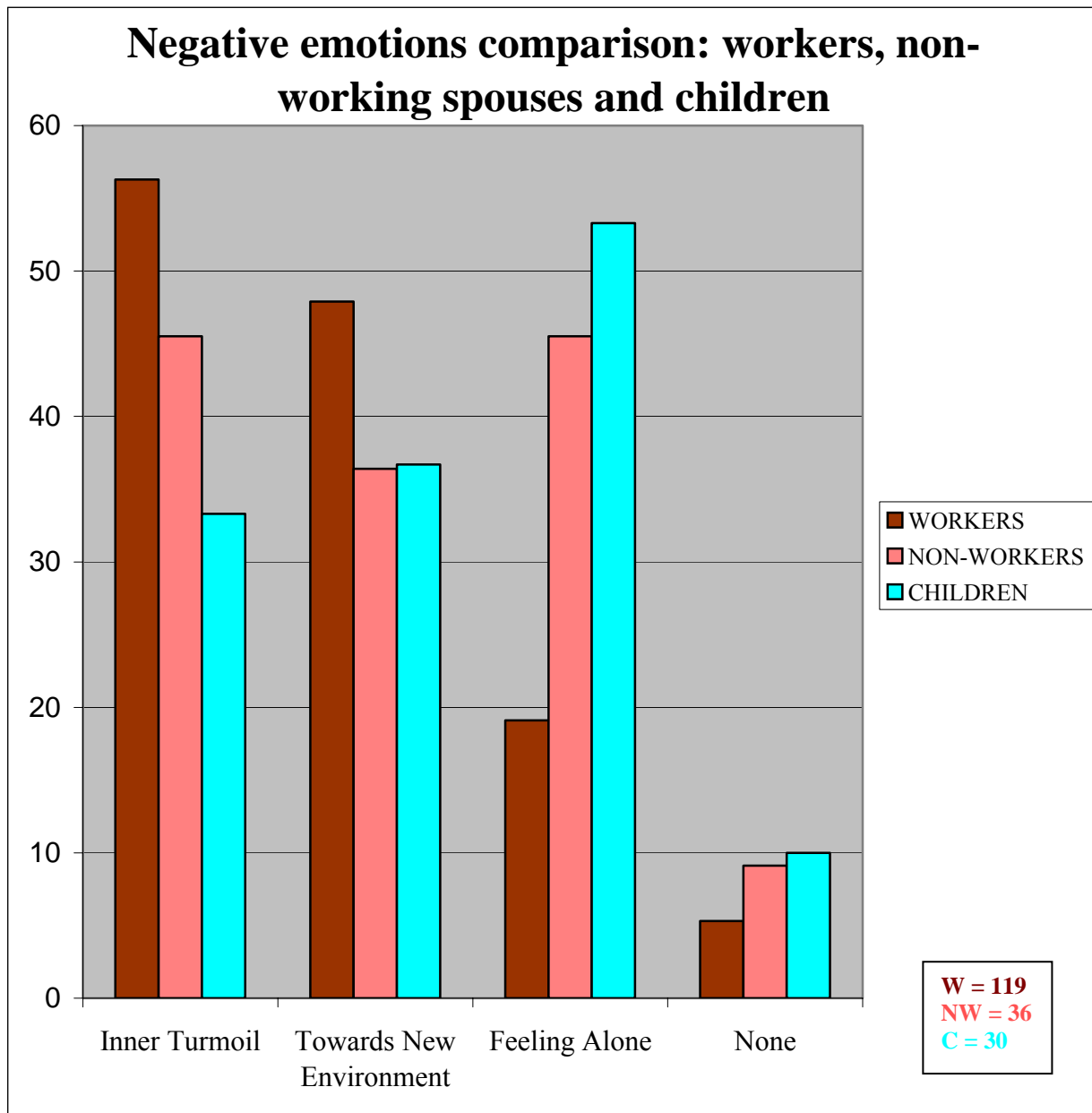


Figure 5.2 Negative emotions comparison: workers, non-working spouses and children

There were differences in each category, but the most significant difference was in the category of 'Feeling alone'. Since workers deal with work issues and interact with people most of the day, they are less likely to experience loneliness. For non-working spouses, it usually takes more time to develop relationships with people in the new country, as often they do not have a known environment, such as the workplace, where they can interact with others.

Children often have the advantage of meeting other children at school, but it can take time for them to feel accepted as part of a group and to make new friends.

5.2.2.2 The effects of prior knowledge of culture shock

Responses from participants who experienced *culture shock* were compared between those who knew about *culture shock* before they relocated and those who did not know about it. This researcher expected to find that participants who were aware of *culture shock* would have had a lower incidence of experiencing it. However, it was ‘shocking’ that a previous knowledge of *culture shock* seemed to make absolutely no difference as to whether the person experienced it or not. The percentage was almost identical, as shown in Figure 5.3. There were 110 participants who answered this question. Of the 67 participants who knew about *culture shock*, 87% experienced it. Of the 34 participants who did not know about *culture shock*, 85% experienced it. There were nine participants who said that they knew a little about *culture shock* and all nine of them experienced it.

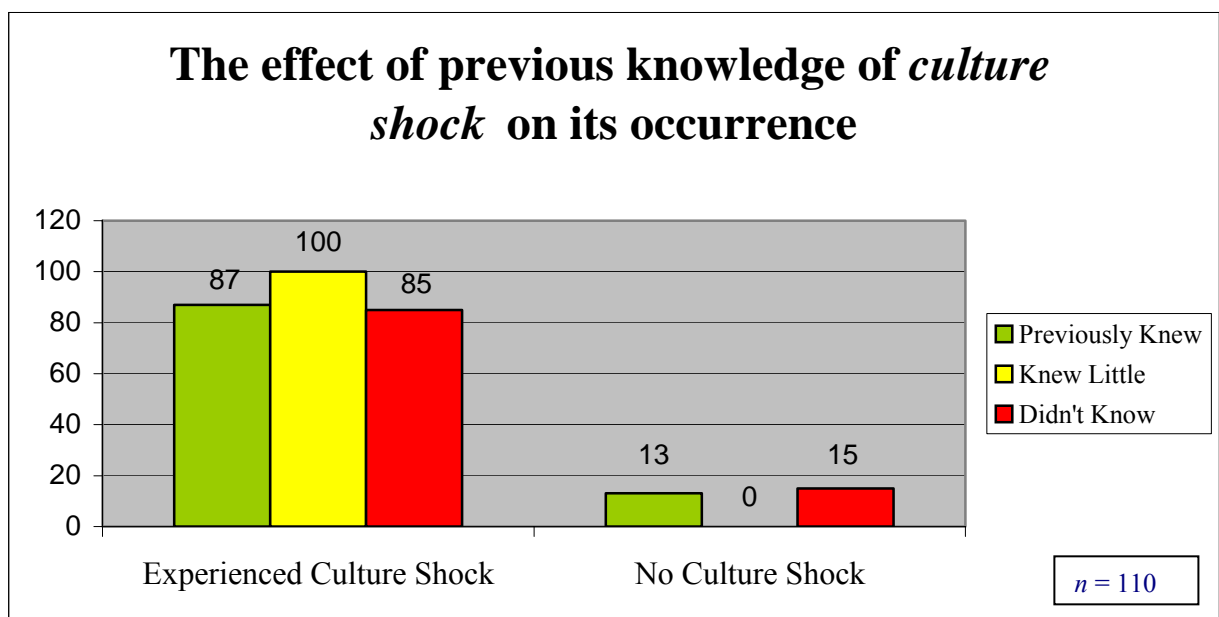


Figure 5.3 The effect of previous knowledge of *culture shock* on its occurrence

People who have had previous experience in moving to a new country tend to feel that since they have been through the process once, they will not experience *culture shock* the next time. Kevin, from Ireland, who was mentioned in Section 5.2.2, stated that before moving to

France, he had lived in Belgium and Spain. He moved four times and was very surprised that each and every time he experienced *culture shock* (Kevin O. 2001 EI).

Expatriates who have previously had a smooth transition to another country may expect the next move also to be easy. Gerard, a Frenchman who worked for three years in Africa and had a good experience there, later moved to the USA. In Africa he found the people to be very *collective* and enjoyed working with them. He formed deep bonds and was able to make a difference in some of these people's lives. He got the impression that human relationships were more important and sacred than he had experienced in France, which at that time was his only reference point. In 1990 he moved to the USA and experienced *culture shock* in the more *individualistic* 'American culture': '*The strength and depth of human relationships in America is far less than what I experienced in Africa. The culture shock I experienced in the US was very difficult and took me by surprise*' (Gerard A. 2001 EI).

Having a lot of contact with different cultural domains during one's childhood can also give an expatriate the expectation that s/he will not experience *culture shock* as an adult. Rachel, from the UK, who described herself as half German and half Chinese, said that this happened to her. She did not think she would experience *culture shock* because of her international background: '*I was the worst sort of victim because I thought I was immune!*' (Rachel F. 2001 EI).

Each of these three examples was from an expatriate who knew about *culture shock* but did not expect it to happen to them. An important conclusion that can be drawn from this surprising outcome, is that although a previous understanding about *culture shock* does not prevent it from happening, it definitely can help someone get through it. Several participants explained that knowing about *culture shock* helped them to realize that they were not alone and that it was a normal part of adapting to a new cultural domain, which gave them the courage to go forward and not quit. Robert, a Canadian who had worked in the Philippines for 21 years, commented that he had received good preparatory training when he moved to the Philippines. This training led him to anticipate that he might experience *culture shock*: '*It didn't prevent it coming, but as I knew it would probably come, I was prepared to deal with it and knew I wasn't too abnormal!*' (Robert S. 2001 EI).

5.2.3 *Adjustment*

Fortunately the *culture shock* stage does not last forever. Most expatriates gradually accept the way things are in the new country and even begin to enjoy many of them. They begin to be able to read some of the new cultural cues and can get around with more confidence.

In EI-9, participants were asked what one thing helped them the most to adjust in their new cultural domain. These answers were grouped into the following categories:

1. Support of friends/family
2. Choices that they made
3. Gaining understanding
4. Getting involved in activities
5. Religion
6. Learning the language
7. Time
8. Home country support

The responses were quantified, as shown in Figure 5.4. The numbers given are the percentages of participants who gave an answer in that particular category. Many participants gave more than one answer, thus the percentages total more than 100.

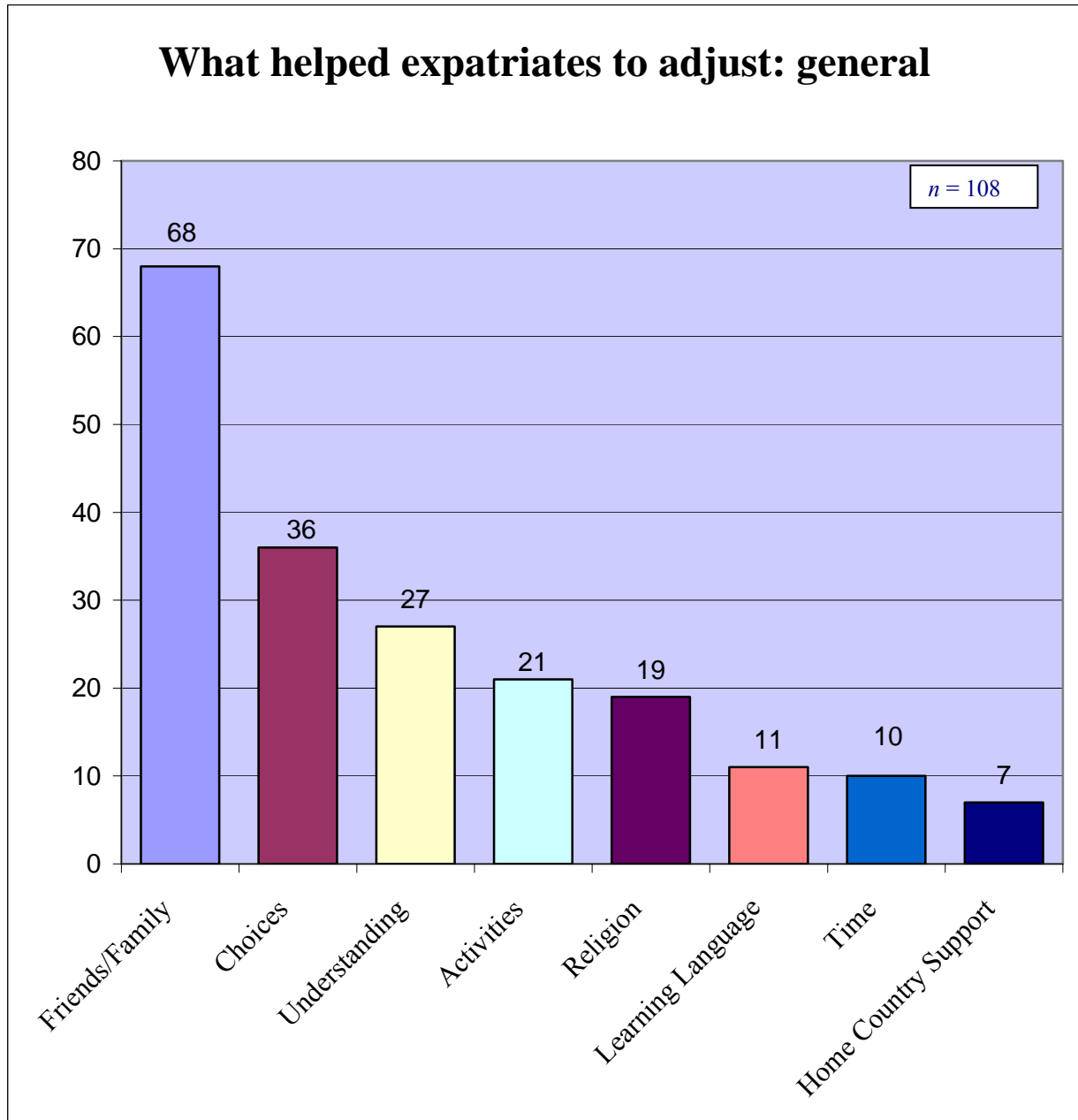


Figure 5.4 What helped expatriates to adjust: general

One of the foremost challenges that expatriates face when they move to a different country is the loss of their support system (see Hess & Linderman 2002:169-173; Marx 1999:5). The first category, ‘Support of friends/family’ had the most number of responses with 68% of participants giving a response in this category.

Some expatriates felt they needed to connect with people from their home country to help them to adjust. Karin from South Africa, who moved to the Netherlands with her husband and two children, illustrates this. She said that the best thing she did was to join the South

African Women's Club. She had to drive 100km to attend the monthly meeting, but she said that it was the main thing that kept her from losing her sanity. She received a tremendous amount of support and advice, as well as many tips from the other ladies: *'The best thing was that at least for a few hours a month, I could have a two-way conversation with people who could relate to me about any subject. I also learnt that I was not alone in my struggles'* (Karin V. 2001 EI).

For other expatriates, developing friendships with the local people was the most helpful thing for them. Elke, a German woman who moved to the USA, responded, *'What helped me the most was that I stayed away from other Germans and I immersed myself into the American culture. I still look back on my first two years with nostalgia and thank my friends for a wonderful time'* (Elke G. 2001 EI).

The second category of what helped expatriates to adjust was 'Choices that they made' and 36% of the participants gave a response in this category. Participants mentioned that they had to deliberately make choices to do things that did not come naturally. Some examples were: choosing to enjoy the experience and to see the benefits rather than complaining; choosing to go out and relate to people when they felt like staying at home; and choosing to laugh at themselves and at their mistakes. Choosing to pace oneself and to rest physically was also important to remember during times of stress. Morné, a South African who moved to the Middle East, said that besides language learning and sleeping a lot, it helped *'when I decided to take things slower, not to put too much pressure on myself and also to learn to laugh at myself'* (Morné D. 2001 EI).

'Gaining understanding' was the third category and 27% of the participants gave a response in this category. One response given by several participants was that learning about the history and the cultural norms of the people in the new country was especially helpful. It was also important for several participants to understand the differences between their home and new cultural domains and to figure out the new rules. Oscar, a German manager who was working in Korea, commented that what helped him the most to adjust was to collect as much information about the culture, the values, the norms, the symbols and the behaviour as possible. He then discussed the things that he had observed with people that he trusted, both with other experienced expatriates as well as local friends that he had made: *'This helped me to make sense of things that I didn't previously understand and to accept them'* (Oscar H.

2001 EI). One last notable response in this category was that several participants mentioned the importance of understanding that *culture shock* was normal and they were not alone in this experience.

Responses in the fourth category, ‘Getting involved in activities’, were given by 21% of the participants. Expatriates mentioned that getting involved in work; joining various social groups; participating in sport; and travelling around the country were activities that helped them to adjust. Denise, a Filipino woman, found that what helped her to adjust in the several countries that she moved to, was finding activities which allowed her to exert some control and self-pride, activities she was good at, even if just reading an English book: ‘*Also helpful were things like friendships, sports and various forms of relaxation*’ (Denise S. 2001 EI).

‘Religion’ was the fifth category and 19% of participants gave a response in this category. Many but not all of these responses were from missionaries and Christian volunteer workers. The responses included prayer, their faith, the Bible, their church and their relationship with God, as what helped them the most. During difficult times, several participants mentioned that they needed to remember that God had called them to be where they were living and He would help them through the difficulties. Hendrik, from South Africa, who was living in the Middle East, said that what helped him and his wife to get through their struggles was, ‘*knowing that our calling is from God, and knowing that this is where He wants us to be*’ (Hendrik V. 2001 EI).

‘Learning the language’ was the sixth category, in which 11% of participants gave a response. The interviewees did not expound on why language learning helped them, but it is generally known that knowing the local language opens the door to more opportunities and experiences. Relationships with the local people are fuller; it is easier to shop and get around the country; and the expatriate will understand the local people better if s/he learns the language. Knowing the local language helps the expatriate to develop a better support system, enhances the feeling of belonging, and helps the expatriate to feel included when people around him are talking in their own language.

The seventh category was ‘Time’ and 10% of participants mentioned a response in this category. When asked what helped him to adapt the most, Ted from the USA, who was living

in South Africa, stated, *'Time. Time. Time. Time'* (Ted L. 2001 EI). It does take time to adjust to changes in life, especially moving to a different country.

The eighth and last category was 'Home country support', in which 7% of participants gave an answer. This category included responses like expatriates visiting their home country, phoning and e-mailing people at home, and having their friends from home coming to visit. Alan, an Englishman, said that what helped him the most to adjust to life in Germany, was accepting his 'Englishness'. He had always felt that he was different from most Britons. He had learnt several foreign languages and when he moved to a different country, he did not associate with other expatriates, but rather mixed with the locals. Over time he started to accept that he was, and always would be, an Englishman. He knew that he would always have a slight accent and he would always see things slightly differently than people who were not from the UK. He would always miss some typical English foods and drinks. *'Modern communications, such as the internet, have now made it possible for me to access things like English news, which helped to soften the blow of culture shock'* (Alan W. 2001 EI).

Many participants gave more than one response to things that helped them to adjust. One example came from Stuart, an Englishman, who moved first to South Africa and then to Australia, wrote that a combination of things helped him, but the most important were: firstly, developing a network of friends outside of his work environment; secondly, travelling within the new country and gaining cultural exposure; and thirdly, the passing of time. According to Stuart, these factors enabled him *'to gain different perspectives and new insights and assisted greatly with the adjustment process'* (Stuart A. 2001 EI).

Pam, an American teacher working in China, said that remembering that adaptation takes time helped her a lot. It helped her to know that many of her difficulties would likely pass. *'I also relied on my faith and my friends to help me keep moving through the process'* (Pam F. 2001 PI).

5.2.3.1 Comparison between men and women

Responses from men and women were separated for the purpose of comparison. The results are shown (see Figure 5.5) as a percentage of participants giving a response in each category.

Women scored significantly higher than men in the category of 'Friends/Family'. They scored somewhat higher than men in the categories of 'Activities' and 'Home country support'. It seems that the women were building their support network through finding new friends and often the activities they were involved in also served the purpose of meeting new people. The women seemed to rely on support from home more than the men.

Men scored significantly higher than women in the categories of 'Religion', 'Choices' and 'Understanding' helping them the most. . In order to see if these differences were related to sex or to the differences between workers and non-working spouses, this comparison was also made.

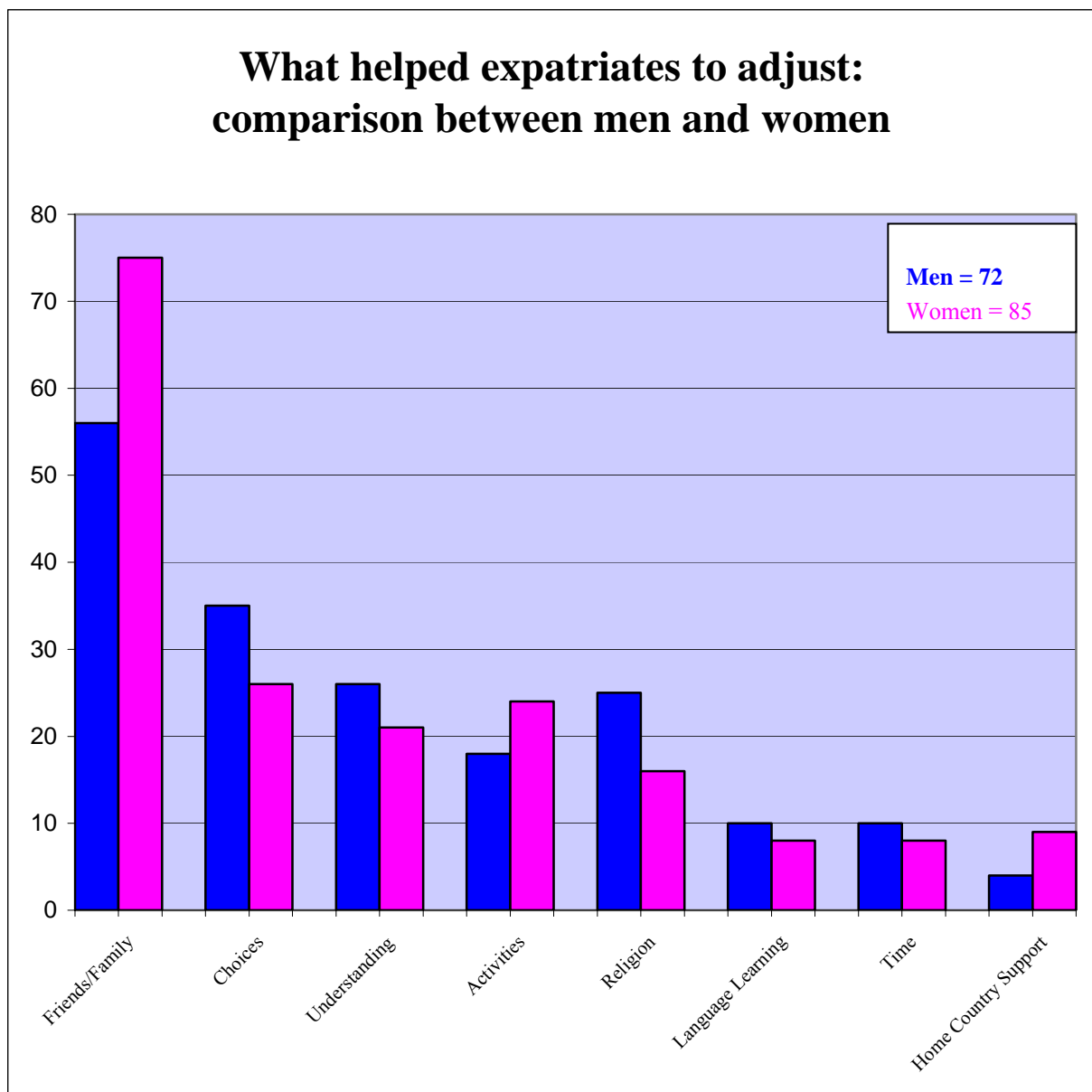


Figure 5.5 What helped expatriates to adjust: comparison between men and women

5.2.3.2 Comparison between workers and non-working spouses

Responses regarding what helped in the adjustment process were then separated according to whether the participants were workers or non-working spouses. If both partners worked, they were both treated as workers in this section. ‘Friends/Family’, as well as ‘Home country support’, were more helpful to non-working spouses than to workers. ‘Choices’ that were made, as well as ‘Understanding’ the new culture, were more helpful to workers than to non-working spouses. (See Figure 5.6.)

Although this research does not cover the issues faces by expatriate children, for interest sake, participants were also asked what helped their children to adapt. One of the biggest needs that children have who move to a different country is a friend. They have left their friends at home and need this vital support system in the new country. It was no surprise in this research that for children, the category of ‘Friends/Family’ received the most responses. The second highest category was ‘Learning the language’. This is part of making friends in many cases. If a different language is spoken in the new country, to make friends with the local children will often require learning their language. Fortunately for them, children usually learn languages more quickly than adults. In many cases children in the new country speak English, which is often the lingua franca for children internationally. Children may establish friendships with other expatriate children as well. Most children make friends at school and in their neighbourhood. Children also scored relatively higher than their parents in the category of ‘Time’ helping them to adjust, which often pertained to the time it took to make new friends. Children have fewer decisions to make regarding the practical issues of relocating and they scored less than adults did in that category. They also scored lower than their parents in the category of ‘Religion’.

The focus of this study has been on the successful adaptation of adults. Just a few things have been mentioned regarding children. This would be a very valuable study, but it falls outside of the scope of this research.

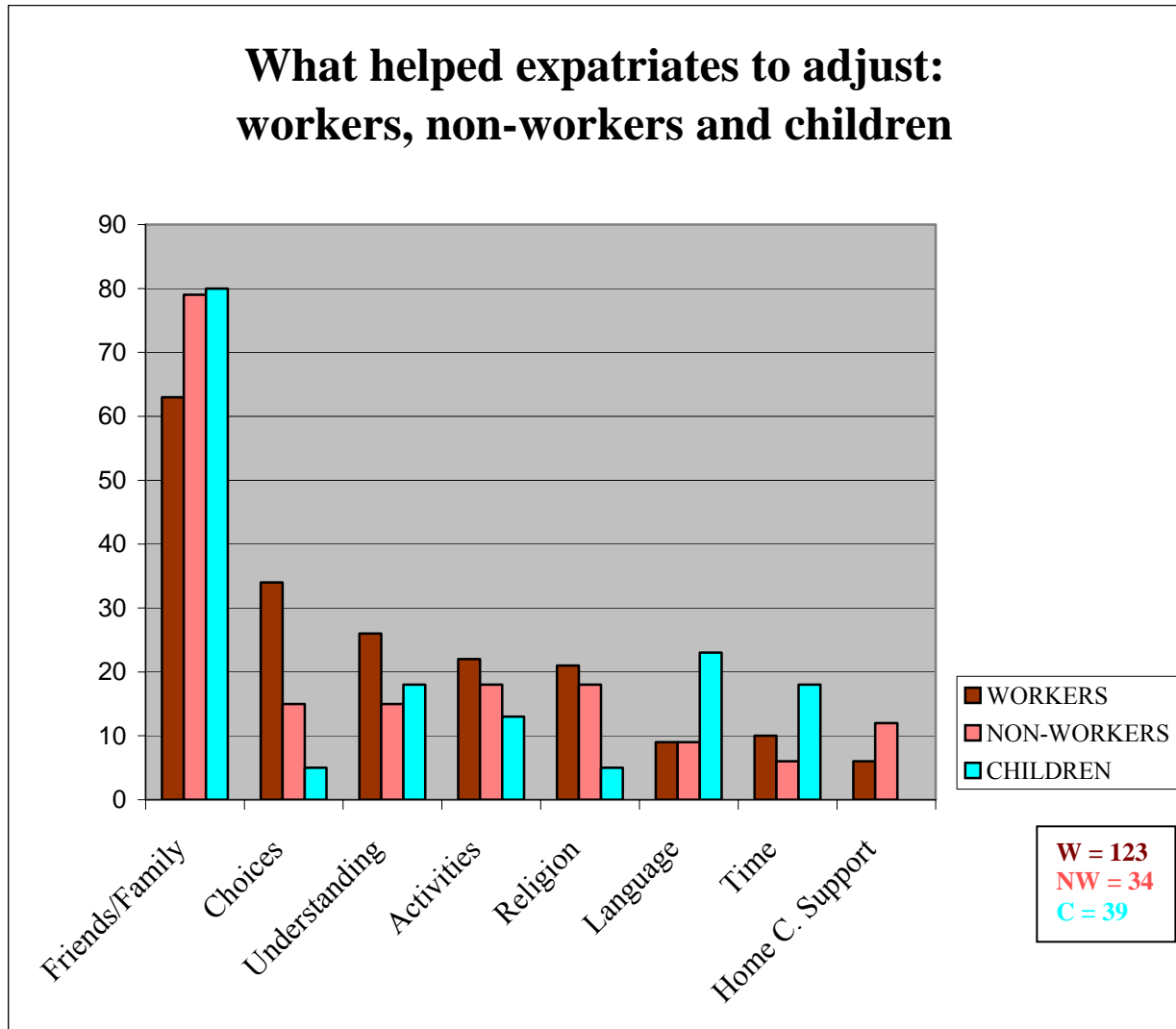


Figure 5.6 What helped expatriates to adjust: workers, non-workers and children

5.2.3.3 Adjustment difficulties

There are many challenges and stresses on the entire family in an international move. The primary worker, usually but not always the man, has to adapt to his new working environment. Spouses have other challenges, like shopping, schooling, helping the children, supporting the worker, etc.

In EI-4, the question asked was, ‘Which person had more difficulty adapting to life in the new country, the worker or the non-working spouse?’ According to the 56 people who responded to this question, significantly 59% of them said that the non-working spouse had more difficulty adjusting to living in the new cultural milieu; 18% said it was equally difficult; 14%

said it was the primary worker who struggled the most; and 9% said it was unclear who had the most difficulty adjusting.

There was not a clear answer in some cases as to who had more difficulty adjusting. Ted, an American living in South Africa with his wife and three children, said that there were different areas of adjustment: relational, church integration, lifestyle, security, etc. *'I believe my wife and I both have challenges, but they are in different areas'* (Ted L. 2001 EI).

In an international move, the non-working spouse often has a more difficult time adjusting because the primary worker, usually but not always the husband, goes to work, comes home to his family and *relatively* little has changed in his life. The spouse often has to sacrifice more and experiences a lot more changes. As was seen in Section 5.2.3.2, what helped the spouse to adjust the most was 'Friends/Family'. The spouse usually has more difficulty building a new support network. David, an American manager working in Malaysia, responded that this was the case for him and his wife. His life did not change much; only the faces that he saw at work were different. For his wife, many things were very difficult: *'She had to leave her family and friends in the USA and mostly had to stay home in Malaysia. She didn't have much of a support structure and was often very lonely'* (David W. 2001 EI).

Finding a new support network in a different country takes time. If the spouse is occupied with meeting the needs of small children, it can be more difficult to make new friends. Living in a country where women are viewed differently by men than they are used to is another difficulty for some women. A South African family living in the Middle East experienced these difficulties. Morné expressed that his wife had a more difficult time adjusting. She was very attached to her family in South Africa and leaving home was difficult for her. In the Middle East, she wanted to be involved with the local people, but her duties at home, such as taking care of her children and their schooling, kept her from getting more involved in her new community. She was very unhappy at first, but once she came to terms with this and accepted it, she felt better. Another difficult issue for her was the role of women in this Middle-eastern society: *'My wife had to be so careful interacting with local men and sometimes she felt dirty the way men looked at her with obvious lust'* (Morné D. 2001 EI).

Having opportunities to meet potential new friends is very important for all expatriates. Working expatriates meet people in their work setting, but many participants emphasised the

importance of developing friendships outside of the work environment. Non-working spouses especially need opportunities to meet new people. Jill, a single British woman living in South Africa, noticed that married women with children seem to make friends more easily, especially if their kids are in school. They have a natural opportunity to interact with other parents and even teachers through their children: *‘It is difficult for me to find South Africans that I can get to know. I have also seen some married women who do not have children, who have also found it very hard to make new friends in South Africa’* (Jill T. 2001 PI).

Kate, an American with two children living in South Africa, was present for a part of the interview with Jill. She heard Jill’s statement and agreed that having children helps to make new friends. Kate said that she was very lonely when her children were small; at that time she only had a few acquaintances. When her children went to school, however, Kate got to know some of the other mothers, who later became close friends and also an important part of her support system (Kate T. 2001 PI).

If the expatriate has children, other difficulties can play a part in the adjustment process, especially for the mother. Matthys and Charné, a South African couple who were both medical doctors, moved to Mozambique. Charné explained that in the beginning, before they had children, they both adjusted equally well in Mozambique. But after their first child was born, she began finding life significantly more difficult. Raising children was very different in the ‘Mozambican culture’. For instance, in Mozambique people do not let babies cry, someone would always pick the baby up and feed or comfort the baby in whatever way necessary. As the children got older, began throwing temper tantrums and challenging their parents, mothers in Mozambique normally gave in to their children’s demands. Also where they lived, children were left to roam around in town with no supervision. This was not the way that Charné and her husband wanted to raise their children and especially Charné had to deal with the social pressure.

Another problem for Charné was lack of privacy. Being white, she felt that her family stuck out like a sore thumb. Everything they did seemed to be a matter of interest to everyone around them. Often their neighbour’s children sat on the fence watching their every move. When she went to the market, she often had a following of young men who teasingly asked to be her children’s nanny or made suggestive comments out loud concerning her or her

daughter: *'We have a man working for us in the house, which also allows me very little privacy and I constantly feel like I'm being watched'* (Charné L. 2001 EI).

Whether expatriates choose to live amongst the locals or in expatriate communities also plays a role in the adjustment process, especially for the non-working spouse. In some places, for example in the Middle East and Asia, there are separate expatriate communities that expatriates can choose to live in. Living in one of these 'villages' has advantages such as: helping expatriates to have easier contact with one another; the shops sometimes stock 'foreign' goods; English is often spoken in the shops; and there is usually good security. The trade-off is that expatriates who choose to live in these areas tend not to mix with or integrate into their local communities. But even living in an expatriate community does not guarantee a feeling of camaraderie. Matt, from the USA, was working for a German company in Malaysia. He and his family lived in an expatriate community in Malaysia. He commented that there were not many American expatriates where he and his family lived and his wife had few other American women to talk to and interact with. The wives of his expatriate colleagues from other countries formed cliques and did not readily accept the few American wives: *'It was very lonely for my wife and also made it difficult for me because she was so unhappy'* (Matt C. 2001 EI).

Usually the non-working spouse has to cope with the practical every-day issues of life. Bruce, an American working in China, stated that his wife had more trouble adjusting because his job was to teach, which he had been doing in the USA, and her 'job' was to run the home, take care of the children and be ready for guests at a moment's notice. This would not have been difficult at home, but in China it initially was very difficult for her to get around or even to buy food. *'A wife of a colleague we knew, rarely left home at all, was very depressed and never did adjust to living in China'* (Bruce G. 2002 PI).

The consequences can be disastrous if someone in the family is not able to adjust in the new country. A heartbroken German man shared that he and his wife moved to a rather remote area in the USA. This turned out to be a very difficult situation for his wife, as in the USA foreign spouses were not allowed to have a paying job, they are only allowed to do volunteer work: *'I'm in the middle of divorce proceedings, my German wife moved back to Germany. Does that answer your question?'* (Timothy B. 2001 EI).

One very real hardship for many non-working spouses is the perceived loss of identity. In many countries, foreign spouses are not allowed to work, as seen in the above example. For many people, their identity and feelings of self worth are strongly linked to the work they do. This is especially difficult if the non-working spouse is a man and if they are living in a country where men do not usually stay home with the children. This was the case for one respondent in this research. Hendrik, from South Africa, was living with his wife and children in the Middle East. He explained that he, the non-working spouse, had the most difficulty adjusting. His wife had a full time job, but he struggled to find work. She had a role in society, which was a place of reference for her, especially when speaking with the local people. As he was not involved in the business world, he often felt useless, unappreciated and not valued for his true worth. Running the household was enjoyable sometimes, but was also a burden. His relationships in the community were strained because he did not have a job and could not explain to the neighbours what he was doing there: *‘It seemed very strange to them that I, as a man, was spending a lot of time at home with the children. It was very stressful for me’* (Hendrik V. 2001 EI). He eventually found a job and adjusted very well.

Personality and other factors play a part in who has more difficulty adjusting. In this study, 14% of participants said that the primary worker had more difficulty adjusting. One example came from Martin and Cathy, an American couple working in Laos. Martin commented that he had many responsibilities at work, which took much of his time and energy. His wife was able to observe the culture more objectively and she adjusted with almost no difficulties. She helped him to adjust to many new ways of doing things: *‘She encouraged me to “go for it” in building relationships with the locals and once I had that focus rather than just getting things done, I adapted much more easily’* (Martin B. 2002 PI).

5.2.4 Lessons learnt from living in a different cultural domain

There are many lessons that can be learnt as a result of living in a different cultural domain, and there are tremendous opportunities for personal growth and career development. In order to identify the benefits of the expatriate experience, participants were asked what was the most valuable lesson that they had learnt as a result of living in a different cultural domain. There were 110 participants who responded to this question. Their responses were grouped

into three categories: they learnt to accept diversity (60%); they learnt to change their attitude or approach (45%); and they realized new things about themselves (43%). Many participants gave more than one response, thus the percentages total more than 100%. Each of these categories of responses will be discussed briefly in the next paragraphs.

5.2.4.1 Accepting diversity

It is significant that 60% of the participants said that the most valuable lesson that they learnt was accepting diversity. The most frequently given specific response in this category was the realization that there was more than one way of doing something. Denise, from the Philippines who lived in several different countries, said that her most valuable lesson was that, *'the way I grew up, what I believed and how I behaved is only one of many equally valid ways in the world'* (Denise S. 2001 EI). Denise previously thought that her way of doing things was the best way. Oscar, from Germany who was living in South Korea, gave a similar response: *'It is important to empty your mind of everything you've learned about your own culture in the sense of seeing it as being the "right" way of doing things'* (Oscar H. 2001 EI). It follows, therefore, that before their expatriate experience, they did think that there was one right way to do something, which was *their* way. It took living in a different country for them to learn this lesson. Often someone else's peculiar behaviour does not make sense until one understands *why* the other person did it the way they did. Many expatriates need to learn not to be judgmental and arrogant and to realize that other people's ways are also valid (see Section 2.4).

The other frequent response to this question was that different is not 'wrong' it is just different. Karin from South Africa responded, *'Probably the biggest lesson I learnt was that just because they did things differently in the Netherlands didn't mean that they were wrong. Different isn't always right and wrong, it can be just different'* (Karin V. 2001 EI). Expatriates have an opportunity to see many ways of doing something and can learn to overcome their ethnocentrism.

It can also help expatriates to overcome feelings of superiority and to accept diversity if they realize that many differences are only external. Alan, from the UK, commented that people in Germany seemed different outwardly, but over time he realized that, *'culture is only the*

outward display of people's learnt behaviours and accepted values. Underneath, we are actually very similar' (Alan W. 2001 EI). Human beings share many things in common but the way that people grow up conditions them to respond in different ways. It is important for an expatriate to understand other people's values and behaviours, but also to recognize the deeper shared values. For example, all humans have a need to love and to be loved, but love is expressed differently in different cultural milieus. For example, as was seen in Section 4.3.1, in Turkey a man cannot hold his wife's hand in public, but he can hold hands with another man. In Western countries the opposite behaviour is socially acceptable. Friendship and love are commonalities among people, but their external expressions can be different.

5.2.4.2 Adjusting attitudes and approaches

Almost half (45%) of the participants responded that the most valuable thing that they learnt was to adjust their attitude or approach. They needed both to see the necessity to make the adjustment as well as the ability to do it. Participants responded specifically that they learnt to be more open, flexible and adaptable than they were before.

It is human nature to observe someone's behaviour and to make a judgment about it, according to what it would mean in one's own cultural domain. For example, in Section 4.3.1, Martin B. said that the way another man touched him would have indicated homosexuality in the USA, but not in Laos. Expatriates need to be more open and less quick to judge the meaning of an action or behaviour. Erica, an American who lived in Scotland and Argentina, expressed that the most important lesson that she learnt was the ability to see things from a variety of perspectives: *'I've now learned to never assume anything!'* (Erica B. 2001 EI). There are many behaviours that mean different things in different cultural domains and it is easy for expatriates to misinterpret someone else's intent.

Another reason to keep an open mind and not to judge another person, is that their behaviour is most likely logical, even though the expatriate may not understand it. Charné, from South Africa, said that she felt that in this regard it was very important to take the time to get to know the local people: *'I learnt never to judge a person's actions on face value, as they normally had a valid reason for acting the way they did'* (Charné L. 2001 EI). It is easier to accept someone else's behaviour after getting to know them and that definitely takes time.

A recurring theme throughout this research was the fact that the people in the new country are not likely to change. An expatriate enters into their cultural domain and may exert some influence, but in general it is the expatriate who must adapt. Expatriates do, however, have decisions to make regarding their own adjustment and the acceptance of people in the new country. Brenda, from the USA, said that for a long time after moving to Italy she tried to change other people. She said that the most valuable lesson that she learnt while living abroad was that it did not matter what she thought of what people in Italy did, they were not going to change: '*I had to adjust to their way, full stop*' (Brenda B. 2001 EI). Frank, from Wales, agreed: '*Things were different in India and I learnt that I must and that I can adjust*' (Frank D. 2001 EI). It can be frustrating and take a lot of energy to try to change a situation that will not change. Expatriates in positions of authority can sometimes bring about change, but in most situations, the expatriate is the one who needs to make the necessary changes.

Many things in life do not go according to plan. This happens to everyone, but it can occur more frequently to expatriates in a new country before they figure out how things work and what to expect. Morné, from South Africa, said that the most important lesson that he learnt was to be flexible: '*Often things did not go according to my plan in Turkey! Learning to go with the flow helped me to survive*' (Morné D. 2001 EI). Being flexible can reduce stress in new situations.

5.2.4.3 Gaining self-knowledge and personal growth

In a famous passage from *Four Quartets*, T.S. Eliot (1962:145) wrote:

‘We shall not cease from exploration,
And the end of all our exploring
Will be to arrive where we started
And know the place for the first time.’

Expatriates learn many things about their own cultural domain by being exposed to a different one. Similarly, in getting to know people from different cultural domains, expatriates have opportunities to learn more about themselves.

Anna, a Hungarian, said that in living in Italy: '*I actually got to know myself more in that one year abroad than all the rest of my life put together!*' (Anna K. 2001 EI). Rebecca, from the

UK, commented that there was nothing more valuable for her than living in Japan, both for what she learnt about the Japanese, but also what living there taught her about her own culture. She added as an afterthought, '*Also, I learned it is important not to lose your sense of humour...!*' (Rachel F. 2001 EI).

Living as an expatriate gives a person an opportunity for personal growth. Esther, from Germany, said that she found it both difficult and enriching to see different ways of doing things and of looking at the world: '*I've come to realize how limited my own cultural view and world view has been. I am now more aware of people and events in the world and am mentoring other people through their own cultural adaptation processes*' (Esther H. 2002 PI).

Ten participants responded that they grew in their relationship with God. Janice from the USA explained that as a result of living in Turkey, she learnt to trust in God in a new way. She had been so discouraged at times that she did not want to get out of bed and face the day. She learnt, through prayer and the Lord's strength, to '*pick up one foot and find the next place to put it down again, trusting that the Lord is guiding where the foot actually lands*' (Janice I. 2002 PI). Janice felt that because she was living in a different country, with much less personal support than at home, she learnt to depend on God more, which was very important to her.

5.2.5 Helpful resources for expatriates

Participants were asked which resources (books, tapes, videos, courses, etc.) were the most helpful to them in their transition to living and working in a new country. The most important findings regarding helpful resources were: cultural training and information regarding the new country, friendships both with local people and other expatriates, and reading literature written by local authors.

Several participants mentioned that a cultural training course had helped them the most to adjust. Denise from the USA shared: '*My two most helpful resources were a pre-departure cultural orientation training and my friends from the local culture*' (Denise S. 2001 EI). Edward, from the UK, who lived in Denmark and Germany, also said that a cultural training seminar was his most helpful resource. He added that for him, the friendships that were

especially helpful were friendships with other expatriates: *'I had many discussions with other foreigners who had previously worked in Germany, which were extremely helpful'* (Edward L. 2001 EI). Neither Edward nor Denise elaborated on the training they received, but most likely it entailed things about the history of the country; information about the language and communication patterns; how business is conducted there; information on practical daily living; and information about *culture shock* and personal adaptation. This information can take a long time to find out if there is no one to explain it. Learning the right questions to ask can be one of the best things that expatriates can do to prepare themselves.

Several participants mentioned that the local literature was a helpful resource: *'I think the best preparation is to read good novels by nationals or people who have experienced the culture. You then get the same information as in a seminar, but in a story form'* (Victor T. 2002 PI). Another respondent agreed, *'Books are helpful, but not only books about the history and economy of the country, but also novels written by local authors'* (Harald Z. 2001 EI). Factual information is helpful for expatriates, for example, which languages are spoken, the population, information about the economy, etc. But novels and films that show the local people's lives, values and customs, can also be very insightful.

5.2.6 The expatriate experience in hindsight

Hindsight is better than foresight. Participants were asked what they wished they had done differently, that is, what did they not do in preparation before they left for the new country, or when they arrived in the new country, that they now realize was important. There were 104 participants who responded to this question: 88 participants gave at least one specific response of something that they wished they had done differently; 15 participants said that they would not have done anything differently; and one respondent, Celine, from Sweden, who lived in the USA, said that she would have done almost everything differently: *'I did not prepare, had no support system and very little true understanding of the host culture'* (Celine R. 2001 EI).

The other responses were grouped into the following categories and the number indicated is the percentage of participants who gave a response in that category. The results appear in Figure 5.7.

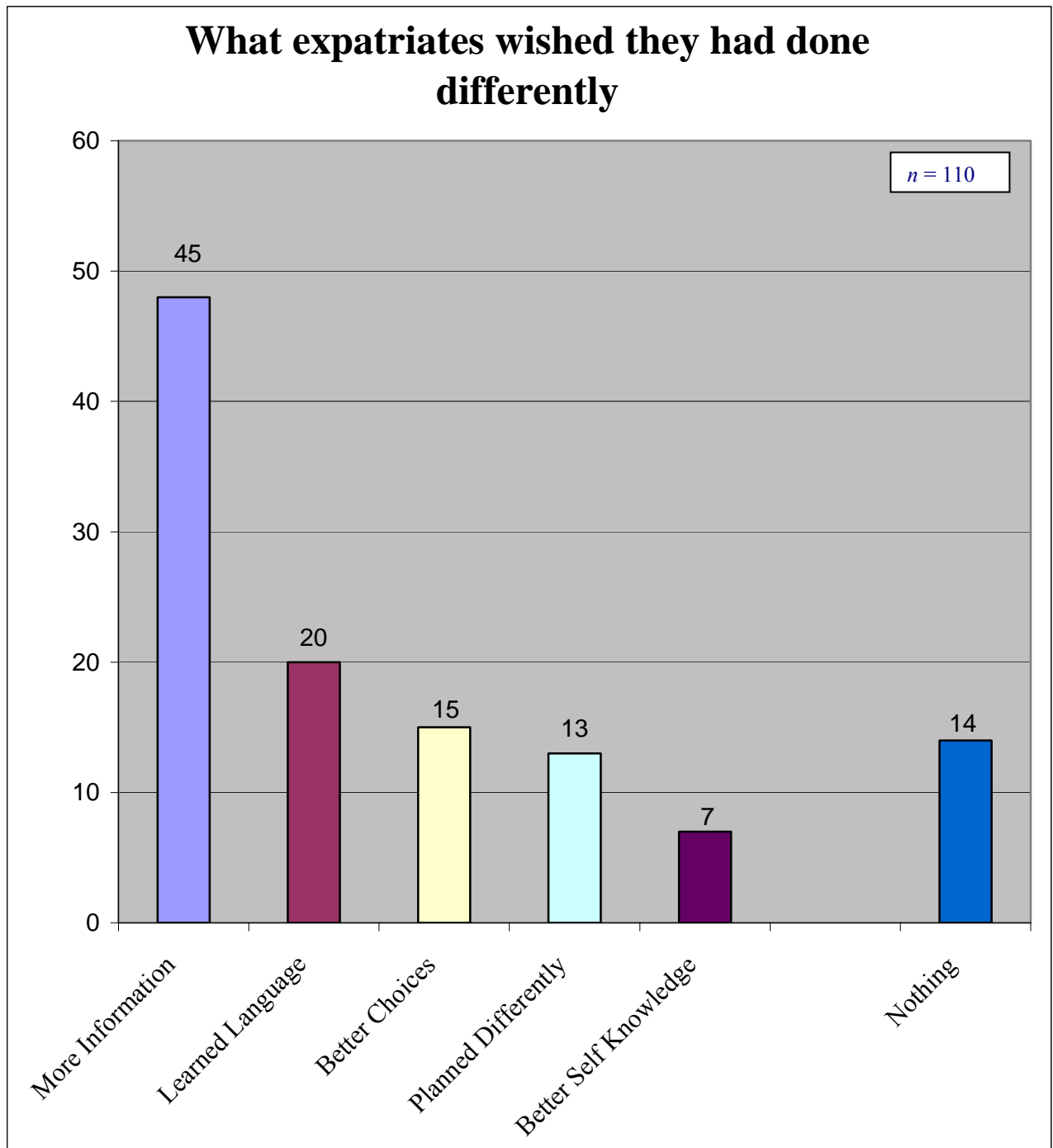


Figure 5.7 What expatriates wished they had done differently

5.2.6.1 Obtaining more information

The highest response by far to this question was that participants wished they had obtained more information about the culture, history and politics of the new country. In addition to information about the country, participants wished they had received more information about

culture shock and adaptation. They felt that this information would have helped them to be better prepared for their transition. Rebecca, from the UK, lived in many different countries. She said that reading about each country that she moved to helped her a lot, as did speaking with other foreigners who worked there. She did not, however, know anything about *culture shock*: ‘*It would have especially helped me if I had known that culture shock existed, and that it was normal!*’ (Rebecca H. 2001 EI). Rebecca said that she struggled a lot with *culture shock* and no one told her that it was a normal phase that most expatriates go through. She said it would have saved her a lot of worry and stress if she had known about it before moving overseas.

Some companies send their managers to work in different countries, but do not provide them with the information that they need to live there, nor equip them with the tools to find out for themselves. Mark, from the UK, moved to Egypt with his wife and two children. He said that they had no cultural preparation at all. Afterwards he realized that they should have read as much as possible about the country, visited web sites and talked with the locals and with other expatriates working in the country. ‘*I also wished that I would have learnt about different management styles and been prepared for those differences, but I did not even know what to ask*’ (Mark H. 2001 EI). It would be wise for companies to provide pertinent information for their employees whom they send to different countries. It would also be a good idea for expatriates to learn as much as possible about the new country before they relocate.

Understanding the history of a country helps expatriates to understand what is happening in the present. Cindy, from Australia, said that she did not know much about the history of the places that she moved to before she went there. She wished she would have known more about the history, especially with regard to how their history influenced the people at present: ‘*Knowing the historical background would have explained why people did things the way they did and think the way they think*’ (Cindy H. 2001 EI). This kind of background information helps expatriates to interpret the behaviour that they observe.

5.2.6.2 Learning a new language

There were 21 participants who said that they wished they had learnt the local language in the new country. Ronald moved from South Africa to Mozambique. He had so much work to do

when he arrived that he did not learn the local language. He admitted that he definitely would take the time out to first learn the language if he had to do it over: *'The needs were so great when I arrived that I didn't have time to do it, but I regret it now'* (Ronald R. 2001 EI). (See 4.2.1.)

5.2.6.3 Making better choices

There are choices that participants wished they had made differently. These included responses that they should have: got more involved when they first moved to the new country; been more open-minded and flexible; had lower expectations of themselves, (gone slower, been more patient); asked more questions; and been more open and honest about their struggles.

It is natural for expatriates to seek places of comfort when surrounded by many strange people and things. These places of comfort can be helpful in integrating into their new society if they help expatriates to connect with the local people. They can, however, be disadvantageous if an expatriate seeks only the familiar comforts and chooses to avoid contact with people in the new country. Erica, from the USA, shared that she made what she called a 'classic mistake' when she moved to Argentina. She watched a lot of television and movies in English as she found it very difficult to follow the local Spanish programmes. She said in retrospect she should have made a deliberate choice to watch television in Spanish: *'I knew what I was doing was wrong, but I couldn't help myself and it took me longer to learn Spanish as a result'* (Erica B. 2001 EI).

Many expatriates are high achievers and have high expectations of themselves. Don, an American, explained that although he lived in Cyprus, his job required him to travel and work in several different countries. It was difficult for him to get very involved in the local community with his job demands, but inwardly he felt that he needed to be more involved locally: *'I had to realize that I can't do everything. Looking back I wish I would have not set my expectations on myself so high'* (Don G. 2001 EI). Expatriates can reduce their inner stress by having realistic expectations of themselves and this often requires making a deliberate choice.

Excessive alcohol consumption is a danger for expatriates as an attempt to escape from the stresses of the new *cultural domain*. This question was not asked, so as not to embarrass or cause discomfort for the participants and thus jeopardize the trust relationship that was being built. But too much alcohol consumption is a classic problem in expatriate circles (see Marx 1999:27).

5.2.6.4 Planning differently

Planning is a key factor in successfully relocating to another country. Participants said that looking back they wished they would have: visited the new country first before moving there; brought different things from home; obtained more or better training for their job; had better communication with family back home; done more research on where to live in new country; and set up an Internet banking system.

Sometimes a company will send an employee, but not the spouse or children, on a scouting trip to the new country. Timothy, from South Africa, visited Germany several times before he moved there with his family. He said that, in retrospect, he definitely should have taken his family to Germany on an introductory visit before they relocated: ‘*That would have helped us to avoid many of our conflicts*’ (Timothy B. 2001 EI). If the expatriate is married, the spouse has to deal more with the day-to-day issues of living in the new country. It is easier to handle emotionally if the person knows what to expect, and it is also helpful for the spouse to know what s/he is letting him/herself in for. Jonna, from Sweden, did not accompany her husband when he visited Egypt before they moved there and she regretted it later: ‘*Visiting the country first would have helped me know what to pack and to prepare myself much better*’ (Jonna H. 2001 EI).

5.2.6.5 Improving self-knowledge

Seven participants responded that they wished they would have known themselves better. Specifically, that they had: a better self-esteem; known their real motives for moving overseas; recognized their personal struggles; known their own personal and cultural values better; and been more aware of their own personal adjustment. Frank, from Wales, commented that he wished he would have better understood his own values and also the

values of his own culture: ‘*It would have helped me to recognize and understand the other people’s values in India better if I would have been aware of my own values more*’ (Frank D. 2001 EI). It is not possible to know everything about oneself and sometimes an expatriate gets to know him/herself much better during the experience of living in a different cultural domain.

5.2.6.6 Not changing anything

Some participants (14%) would not have done anything differently. Denise, from the Philippines who lived in several countries, said, ‘*I love surprises and I like to fly by the seat of my pants most of the time!*’ (Denise N. 2001 EI). Of course personality also plays a big part in this regard.

5.3 REPATRIATION DIFFICULTIES

Repatriation or moving back home again, is the fourth stage in the process of relocation. Most expatriates who work overseas do eventually move back home. Figure 5.8 illustrates the emotional roller coaster of moving overseas, the *honeymoon stage*, *culture shock*, *adjustment*, *reverse culture shock* at home, and *adjusting* again. This is a very simplified diagram of a complex experience. As was discussed in Section 5.2.1, it is actually a cyclical experience and difficult to illustrate in a linear fashion.

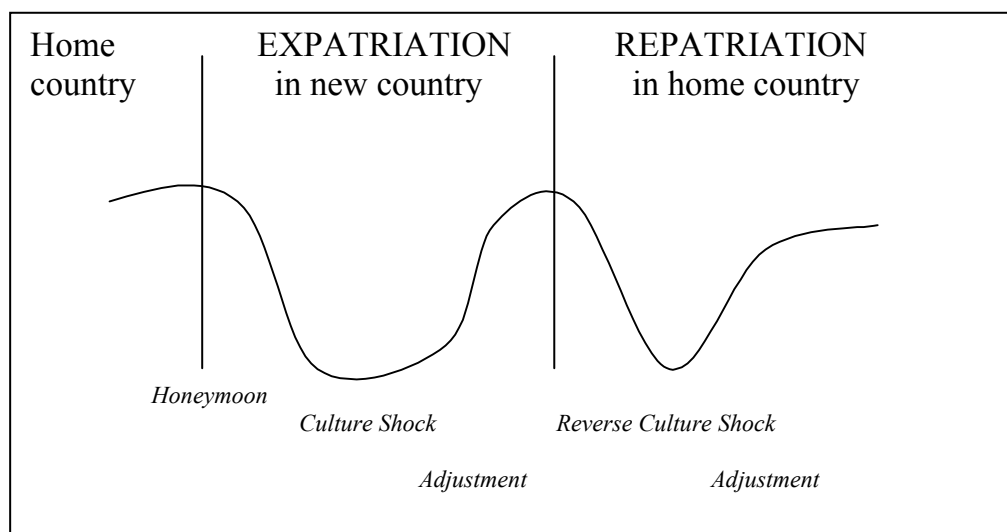


Figure 5.8 The emotional roller coaster of expatriation and *repatriation*

There is less literature written about *repatriation* than about expatriation and it is also less known. This may be because of the false notion that going back home will be easy, although that is not often the case. Many returning managers have had difficulty finding their place back in the company and in society in general (see Amend 2000). Many expatriates experience *reverse culture shock* when they repatriate and these difficulties will be explored in this section.

It is difficult to find information documenting the difficulties that expatriates face when they move back home. Craig Storti, in his book *The Art of Coming Home*, gives some statistics:

- ‘In one study of American returnees, 64 percent reported “significant *culture shock*” upon repatriation.
- In another survey, 64 percent of Dutch and 80 percent of Japanese expatriates said they found coming home more difficult than adjusting overseas.
- Only 7 percent of returning teenagers said they felt at home with their peers in the USA...
- More than 50 percent of the executives in a survey of American corporations said they experienced social re-entry problems upon repatriation’

(Storti 2001b:xiv).

In EI-10, participants who had moved to another country and then moved back home again, were asked what part of the *adjustment* of moving back home was the most difficult. There were 60 participants who fit this criterion. Their responses were categorized as shown in Figure 5.9. The numbers above each bar indicate the percentage of participants who gave a response in that category. Each category will be examined and specific examples will be given.

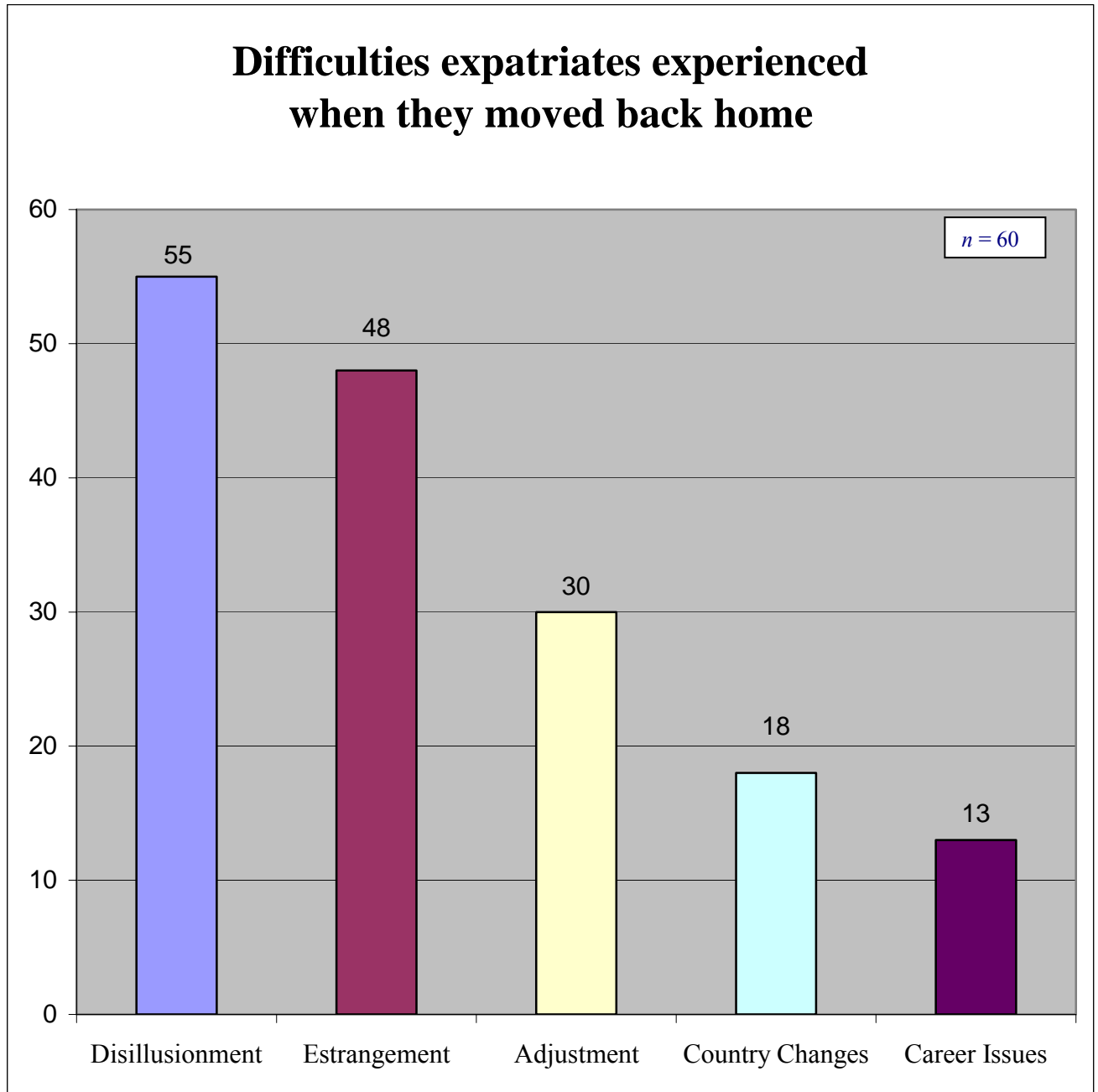


Figure 5.9 Difficulties expatriates experienced when they moved back home

5.3.1 Disillusionment

The highest number of responses to this question fit into the 'Disillusionment' category. Participants stated that they became judgmental towards their home country or an aspect of their home cultural domain. There are many things in one's own cultural domain that are taken for granted until one is exposed to something different. Anthony, from South Africa, spent three years working in the USA and then returned to South Africa. He commented, 'I

did not realize how frustrated I would be with things in South Africa that I had previously just accepted. My problem is that I no longer accept them after seeing a different way' (Anthony K. 2002 EI). He did not give specific examples as to what those things were, but many expatriates experience this regarding some issue or another when they return to their home environment.

A more specific example came from Michelle, an American who had lived in Nepal. She said that her biggest difficulty in moving back to the USA, was with dealing with people's attitudes. She struggled with their narrow world-views, self-centred attitudes and their air of superiority. She felt that she had lost some of her identity as an American and now found her identity in a more global culture: *'I still have trouble relating to many Americans who have never been outside of America. It was also hard to relate my experiences, as they didn't understand and had no context to understand'* (Michelle R. 2001 PI). Sometimes returning expatriates have more in common with other expatriates than with people from their own hometowns who have never lived in another country.

Practical aspects of their home country were difficult for some expatriates to adjust to when they returned home. Participants mentioned things like the crime situation, the cost of living, inefficiency, the weather and the tight social codes. Mark, an Englishman who moved to Egypt and then back to the UK, illustrates this. He explained that he had tremendous difficulty with the high cost of everything when he returned to the UK. The stress of life, people not having time for each other, and the lack of commitment towards friends and family was also difficult for him: *'My Egyptian friends would put themselves into debt for me, my British friends wouldn't even remember to call me'* (Mark H. 2001 EI). Before Mark lived in Egypt, these things seemed normal to him. Once he had seen and experienced the close relationships and commitment towards other people in Egypt, he felt that his values had changed for the better and judged the 'shallowness' of his own countrymen. It would be a valuable study to examine the *repatriation* process in more depth to see whether expatriates accept the status quo and gradually change back to the way they were before they left; whether they retain many of their new values and find close friendships with other expatriates; or whether they are so unhappy that they relocate overseas again.

5.3.2 Estrangement

One recurring remark regarding the difficulty participants experienced in moving back home was that it came as a big surprise. This was often mentioned in the context of friendships in the home country. Nineteen participants mentioned things like: no one understood them; people were not interested in their experiences; they were lonely, they no longer fitted in at home; and they felt like strangers. Pam, a US American who worked in China, said that she thought that moving back home would be easy, but it was very difficult: *'I felt like I didn't fit anywhere, even among people I knew well. I was very lonely'* (Pam F. 2002 PI). Pam spent a year in the USA and then moved back to China.

While expatriates are gone, life goes on for their friends and family back at home. Many of them grow and develop in different ways and friendships can change during periods of separation. Kris, from the Netherlands, expressed that her friends and family's lives in the Netherlands had gone on while she was away; she had not been a part of it and she felt very left out. Also there were very few people who were *really* interested in what she and her American husband had been doing in Hungary. Few people at home had asked what they had been doing and how their work had been going (Kris D. 2001 EI). Her husband Richard agreed: *'It was difficult that people could not relate to what we had experienced and often it seemed like there was no interest either'* (Richard D. 2001 EI).

Some returning expatriates find it difficult to communicate their experiences. This can result from the other people not being interested, others not having a framework to understand their experiences, or even difficulty expressing them in a different language. Silke, from Germany, had difficulty with the 'total non-responsiveness' of her close family when she moved back home. She thought that at least her family would be interested in knowing about her experiences. She was also very surprised to realize that she had actually changed a lot during the time that she was away from home. Her communication style had become too *indirect* and understated for the German environment: *'I lacked a social support network back in Germany and I couldn't find words in the German language to describe my feelings and experiences'* (Silke A. 2001 EI). Without supportive family or friends, returning expatriates can feel very lonely and separated from the same people that they had expected to receive support from. Silke ended up marrying an American and now works in both the USA and Germany.

Cindy, a single woman from Zimbabwe who had lived in the UK and in South Africa, wrote, *'I don't actually know where home is anymore'* (Cindy B. 2001 EI). Home is often considered to be where one's family and closest relationships are. Especially for a single person, when family and close friends at home are not supportive and understanding, it is not surprising that the locus of home becomes a bit confusing.

5.3.3 Personal and family adjustment

Almost without exception, living in a different cultural domain will change a person's life. Six participants said that they had personally changed so much while they were gone that it caused difficulties coming back. Donna, an American who had lived in Japan, commented that she had changed a lot personally and it was difficult for her to adjust to living back in the USA. It did not feel like home anymore: *'I have been back in the USA for five years now and it still is not completely home for me. Mark Twain wrote, "You can never go home again" and this has been my experience too'* (Denise S. 2001 EI).

For several participants, the most difficult thing in *repatriating* was helping their children to adjust to life back in their home country. Jonna from Sweden, who was living in the UK, shared that the hardest part about moving back home to the UK from Egypt was that she and her family had no idea what to expect when they moved back home; no one told them what it would be like. *'I especially had difficulties coping with my kids' re-entry struggles, they constantly begged us to move back to Egypt'* (Jonna H. 2001 EI).

5.3.4 Country changes

A few participants felt that their home country had changed for the worse since they had left. It is difficult to assess whether this was actually the case, or whether they perceived it differently after having lived in a different country. Pam moved from her home in the USA to China and then moved back home. She did not like some of the changes that she saw when she moved back to the USA, especially regarding *'the continued disintegration of families and the moral decline. One of the hardest things for me is seeing that the focus is on materialism and work in America and not on relationships, which I had gotten used to in China'* (Pam F. 2002 PI).

Sometimes even an expatriate's country's borders can change while s/he is gone. This happened to Sabine, who left West Germany in 1986 and came back in 1992, three years after the reunification of East and West Germany. '*I came back home and I was a stranger in my own country*' (Sabine M. 2001 EI).

5.3.5 Career issues

Some participants said that they had career difficulties when they moved back home. Some companies have difficulties knowing what to do with returning expatriates and many expatriates have difficulty fitting back into the company which sent them abroad in the first place (see Amend 2000, Storti 2001b: 79-82). Silke, from Germany, experienced this: '*Everything was difficult for me when I moved back to Germany. I did not fit in terms of qualifications and I had trouble with career issues*' (Silke A. 2001 EI).

5.4 CULTURE SHOCK AND REVERSE CULTURE SHOCK COMPARED

Many expatriates believe that coming home will be easy. Unfortunately 'coming home' is not that simple for many returning international managers (see Marx 1999:131). The participants who had relocated and moved back home were asked which adjustment was more difficult. Of the 56 people who answered this question: 57% said that moving back home was more difficult; 29% said that moving to the new country was more difficult; and 14% said it was about the same.

Part of the difficulty regarding *repatriation* is the surprise of it. Expatriates are prepared to make many adjustments when they move to a new country, but they do not usually expect to have to adjust going back to their original country. Richard, from the USA, moved to Hungary and then back to the USA. He said that going back home was more difficult for him, probably because he expected to feel at home again as soon as he stepped off the plane: '*But it took quite a long time for me to adjust to being back home and I wasn't prepared for that*' (Richard D. 2001 EI).

Yi Ming, a Chinese man who studied and worked in the USA, wrote that moving back to China was more difficult for him than his initial move to the USA. He could not help

comparing the cultures and he began to judge his own culture. Also he had become too Western for his Chinese friends and felt neither pure Eastern nor pure Western: *'My Chinese friends also had trouble adjusting to me. I still looked like them, but I had changed. Inside my mind my thoughts were so different, and they didn't have a clue'* (Yi Ming S. 2001 EI).

CHAPTER 6

SUMMARY AND CONCLUSIONS

6.1 AIM AND OBJECTIVES

In this study it has been emphasized that recent decades have witnessed an increase in international travel, international business ventures and also an increase in the number of people who actually relocate to another country. Living in another country proved to be much more complex than taking a holiday or a business trip, as expatriates needed to learn how to live and work amongst people who have different values and customs. Tourists and people on business trips do not have to make as many adjustments as expatriates because they know that they will not have to tolerate many of their difficulties for very long.

Although there is much cultural exchange taking place in the world, especially through Hollywood, MTV, books and other literature, it was shown in this research that vast differences remain between people from different places and these differences create various problems that have to be dealt with when people relocate to other countries. This was evidenced by the fact that most expatriates have difficulties adapting to their new living and working environments. Some are better prepared than others and this played a role in their ability to overcome their difficulties. Mistakes, misunderstandings and discomfort are inevitable for expatriates, but this study exposed many cultural differences that can help people understand each other, make relationships easier and help expatriates be more successful in their endeavours.

The aim of this dissertation was to identify the main difficulties of a cultural nature that expatriates faced in the course of the expatriate episode. This included their adaptation to their new work and social environments, as well as coming back home again (see Chapter 5). Findings of earlier researchers were assessed to see if they are still relevant and applicable (see sections 2.5; 3.2-3.5). Difficulties that expatriates faced in the workplace were investigated (see Chapter 3), as well as the *verbal* and *non-verbal communication* problems they faced in their daily lives (see Chapter 4).

The most pressing emotional difficulties that expatriates experienced during their adaptation process were identified, as well as the degree to which these were shared by workers, non-working spouses and children (see 5.2.2). The hardships encountered by expatriates as they relocated to their home environment were also discussed (see Section 5.3). The ways and means of overcoming the problems that expatriates experienced were identified (see 5.2.3), as well as what role prior cultural orientation had in reducing their stress during the expatriate episode (see 5.2.2.2; 5.2.5; 5.2.6).

Lastly, this study tested the feasibility, reliability and value of virtual interviews conducted by way of e-mail correspondence, for those participants who were located far away from the researcher (see 1.4.2.2, 1.4.2.6, 1.4.2.7).

6.2 KEY LITERATURE

Although there is much literature on globalization, most of what was found by the researcher was not written from an anthropological perspective. Appadurai's (1996) model of global cultural flows, (regarding the global movement of people, information, finance, technology and ideas) proved to be a foundational one for the researcher in understanding globalization at present (see 2.2.2). It did not, however, address the issue of expatriates; therefore, it played a key, though indirect function in the formulation of this dissertation.

Bauman's (1998) writing on globalization, as well as Smith's (1999) writing on Bauman's view of postmodernity and globalization proved to be invaluable to the researcher. Bauman's works gave the framework for the researcher to understand the forces of modernity and the shift to postmodernity and their effects on the globalization process (see Section 2.2). As with Appadurai's writings, Bauman's works did not directly influence the questions asked in this study, but it was crucial for the researcher to understand the historical context of globalization as an underlying framework for this dissertation.

Globalization has led to a re-assessment of several terms, one of which is the concept of 'culture'. Traditionally culture has been understood as 'the way of life of a group of people'. This essentialist view was held by the researcher at the beginning of this study and it is in fact still used in this way by the majority of people in everyday language. A lot of popular

literature today, especially in other disciplines such as business management, also uses the essentialist view of culture. After reading Kuper (2003), Holden (2002), Mathews (2000), Baumann (1999), Brumann (1999), Hannerz (1997) and Turner (1993), the researcher has adopted a more ‘processual’ view of the term ‘culture’ (see section 2.2.3).

Two books in particular have been highly influential in the early study of culture and management, namely Hofstede (1994) and Trompenaars (1994). Hofstede’s research (see 2.5.1), which was conducted before 1972, has been and remains foundational in the business section of most cross-cultural training programmes for expatriates relocating abroad. As his research was conducted before the days of the fax machine, personal computers, e-mail and the Internet, there is controversy today among consultants and trainers in the cross-cultural field whether Hofstede’s research is still valid. This motivated the researcher to test his four main dimensions for relevance in the business section of this study (see sections 3.2-3.5; 6.4). Trompenaars’s research (1994) also remains foundational in the business sections of the cross-cultural field. His ideas were discussed in Section 2.5.2 and were also used in formulating interview questions.

It is very expensive for companies to send managers and employees to work and live in other countries. Many companies also recognize the emotional stress an expatriate faces and therefore provide help for their managers who relocate in the form of cultural training (to help them understand the cultural roots of the new country, the values and business and social etiquette etc.). The training materials provided by the companies have been a source of valuable information to the researcher regarding the cultural issues that expatriates encounter as they relocate (see 1.3.1).

Lewis’s (1999a; 1999b) two books were somewhat helpful for this research, and which could be extremely helpful for expatriates and people taking business trips to different countries. He writes about cultural values and business practices in specific countries. Similarly, Mitchell (2000) writes about the cultural factors of how business is conducted in many different cultural domains. Many other books and articles have been written which give information about specific countries or areas of the world. Fadiman (2000) and Richmond & Gestrin (1998) write about doing business in Africa and Nees (2000) writes about Germany. Although the series of books published by *Culture Shock!* and *Lonely Planet*, which deal specifically with different countries, are very helpful for expatriates moving to these

countries, they were only minimally helpful in designing some of the questions for the interviews.

One of the most helpful concepts was Hall's (1995) cultural literacy model, designed to help international companies work well together by making executives culturally literate. Specifically she addresses how international managers need to live with, manage and minimize dissynergy from cultural differences. The researcher took this principal from management literature and applied it to the expatriate moving into a different cultural domain (see 1.4.1). The researcher identified the areas of an expatriate's life (work, social, communication, personal and family adaptation) and asked questions to identify these cultural differences.

Marx's (1999) very helpful book deals with the topic of *culture shock* and cultural adaptation. She describes a typical pattern of adaptation that expatriates tend to experience. This pattern was tested with the research participants (see Section 6.6). Although expatriate children were not specifically researched for this dissertation, Pollock and Van Reken's book (1999) on *The Third Culture Kid Experience* was helpful in understanding the cultural issues that the expatriates' children face.

There is quite a bit of literature written *for* expatriates, but not so much literature written *about* expatriates. There are books which aim to give practical advice for expatriates on how to prepare to relocate, as well as to give helpful tips on how to adapt to their new physical and socio-cultural environment. Some examples are Kohls (2001), Hess & Linderman (2002) and Storti (2001a). While these are very helpful for expatriates, they were also helpful for the researcher to decide which questions to ask during her interviews. There are few books written on *repatriation*, or moving back to one's 'home' country, but Storti's (2001b) book on *repatriation* was helpful for Section 5.3 of this study.

Condry's (2002) article comparing hip-hop in New York to hip-hop in Japan helped the researcher to think about the importance of looking beneath surface similarities to see the very strong impact that home cultural values play on the local scene. Condry describes the importance of doing ethnographic studies at the *genba* site, or locality where it is being played out. In the research conducted for this dissertation, one of the areas studied was one of Appadurai's global flows, which he called *ethnoscapes*. The idea of *genba* site was

incorporated into this research, as the questions asked were from the expatriate's experience in their new location.

6.3 METHODOLOGY

The field research conducted for this study was of a qualitative nature. The aim was to get a broad understanding of the cultural differences experienced by expatriates, therefore, it was necessary to interview people who were located in many countries around the world. This challenge was faced in two ways. Firstly, the researcher has travelled to 45 different countries and travels overseas several times each year. She took advantage of these opportunities to interview expatriates, both formally and informally, on each trip. Secondly, interviews with expatriates were conducted via e-mail when it was impractical to conduct a face-to-face interview (for selection criteria for research participants, see 1.4.2.1).

The fact that the researcher works for an international NGO, belongs to an international professional organization and travels regularly contributed greatly to the success of this endeavour. Because of the broad network of friends, colleagues and acquaintances, it was possible to get a large number of interviewees using the snowballing process (see 1.4.2.2). Initial misgivings about this work method were proved wrong and the medium of e-mail proved an amazingly powerful data-gathering tool. The most challenging aspects of doing e-mail interviews were motivating people to keep on participating in all ten interviews (see 1.4.2.5) and processing the sheer volume of information. The advantages of using e-mail to conduct virtual interviews were many, especially that it was quick, easy and inexpensive to send out a large number of interview questions to people who lived very far away and to receive and process their responses (see 1.4.2.6). The main disadvantage of using e-mail was that it was seldom possible to pick up on something that was written and to expand it further.

Face-to-face interviews were conducted in many different countries as the researcher took advantage of opportunities when she was travelling. Many foreign expatriates living in South Africa were interviewed, and South African expatriates living abroad were interviewed in South Africa when they were visiting 'home'. Because of the many contacts that the researcher has, this was not too difficult to accomplish.

Most of the questions asked in this study were open-ended to give the participants the opportunity to answer the questions in their own words, rather than forcing them to choose an answer that did not actually match their experience.

6.4 WORK-RELATED CULTURAL ISSUES

In Chapter 3, the differences and problems that expatriates experienced in the workplace were identified, with specific attention given to the four dimensions of Hofstede i.e. *power distance*, *uncertainty avoidance*, *individualism* versus *collectivism* and *masculinity* versus *femininity* (see 2.5.1; 3.2-3.5). This research showed that expatriates did indeed experience difficulties and stress in each of these four areas, with at least an 80% positive response in each dimension. These areas, as well as other work-related differences found in this research, will now be summarized.

From Section 3.2, it became clear that there were practical implications for expatriates who moved to cultural domains in which there was a difference regarding *power distance* (PD; democratic versus authoritarian leadership styles; see 2.5.1.1). One overwhelming difference that emerged was the adjustment in expectations between bosses and workers. In high PD cultural domains, the boss expected to make decisions and tell workers what they must do, whereas in low PD cultural domains there was more interaction between bosses and workers, and workers wanted to be a part of the decision-making process. Expatriate managers who moved into a cultural domain that differed in this aspect needed to know if the workers expected to be consulted or if they expected to be told what to do in order to promote good relationships and productivity. Another finding was that business people from high PD domains who conducted business in lower PD domains needed to schedule enough time for discussions and allow a longer time period before expecting a decision to be made.

It was clear from this study that the managers who were aware of cultural issues in the workplace had the ability to change their methods and strategies to achieve the results they were looking for. Western managers who wanted constructive criticism in a non-Western environment were able to adjust their approach. Evidence showed that when they directly asked employees for negative feedback, it made the employees uncomfortable and they were not able to get the information they needed. When the managers modified their approach by

asking a group of people to discuss the issue and have one person report back to them, they were then able to achieve their goal (see Section 3.2). Knowing the culturally appropriate way to do something saved time and frustration for everyone.

Research showed that the expatriates in this study who were employees (not in managerial positions), and who moved from a low PD cultural domain to a high one, had difficulties in their new job because they were no longer able to give input and take part in the decision-making processes as they were used to. There was little recourse for these expatriates, they had to choose to accept the new situation or find a different job (see Section 3.2).

This research showed that there was a sizeable difference regarding *uncertainty avoidance* (UA; feeling threatened by unknown or uncertain situations; see 2.5.1.2; 3.3) for many expatriates when they moved to a different country. In this study, most of the expatriates moved to cultural domains where there was less willingness to take risks and to implement change. This meant that they had to learn to allow more time to see changes take place and to implement change in a culturally appropriate manner. If expatriates are aware of this difference, the change process may still take longer, but the frustration they experience can be lessened.

This research showed that the majority of expatriates experienced a difference between cultural milieus characterized by *individualism* and *collectivism* (see Section 3.4). In this study the majority of expatriates moved from a more *individualistic* cultural domain to a more *collective* one. Specifically it became clear that in more *collective* cultural domains, decisions took longer to be made, family obligations often conflicted with work expectations and there was a difference in the importance of relationships versus tasks. The awareness of these value differences helped the expatriates to understand the local people and to find ways to accomplish their tasks with smoother working relationships (see 2.5.1.3; 3.4).

The main findings regarding differences between *masculine* and *feminine* (M and F) cultural oriented domains were that expatriates had to adjust the way they communicated and that there were different values between profit and relationships. The expatriates who moved from more M to more F cultural domains specifically had to be less blunt and assertive in the way they spoke and in the way they handled conflict. This was a fairly easy adjustment to make, but until they changed, they offended people with their forthrightness (see 2.5.1.4; 3.5).

In addition to the dimensions taken from Hofstede, other work-related differences were also identified, namely: relationships, meetings, women, status, titles, racism, motivating employees, time, negotiating and business cards. The proper handling of these differences is very important for expatriates if they want to be successful in their new working environment (see Section 3.6). The researcher initially had hoped to make general comments about each of these areas, but this proved to be almost impossible. Most of the findings were specific differences between two cultural domains, each unique to their specific combinations, making generalizations difficult. The findings will, however, be summarized.

In some countries, people must first develop a relationship with the other party before they can discuss the business at hand and the failure to do this could result in the deal falling through. In this study, an overwhelming number of expatriates noted a difference in this aspect of business (see 3.6.1). This is a crucial aspect to be aware of, especially for Western expatriates working in non-Western countries.

It was evident in this study that the way in which women are esteemed and treated varies in different cultural domains (see 3.6.3). Many Western women have equal or near equal status with men, but in many other countries this is not the case. For a woman expatriate this is especially significant as she could be highly offended if she is not treated with the same respect as she is used to. This research showed that whether status is *ascribed* or *achieved* also has practical implications (see 3.6.4). If a young, knowledgeable person from a cultural domain where status is *achieved* is sent to negotiate with an older executive from a cultural domain where status is *ascribed*, the latter could be highly offended. The importance of showing honour in a particular way (in this case, who negotiates with whom) is essential in some cultural domains. Similarly, the importance and proper use of titles differed for many expatriates (see 3.6.5).

More than half of the expatriates in this study said that the way people in various places viewed 'time' was different (see 3.6.7). In some cultural domains, schedules were strictly adhered to, while in others they were simply guidelines. A manager in whose cultural milieu punctuality is considered of prime importance may be highly offended when an overseas business partner – in whose cultural milieu this is not the case – arrives 20 minutes late for a scheduled meeting. Frustrations can be lessened if expatriates understand this difference.

Motivating employees is an important aspect of leadership. This research showed that expatriates who manage other people must understand how employees in the new setting are best motivated (see 3.6.8). Strategies that work in one place, like praising individual accomplishments, may not be appropriate in another location.

A small thing, like how to physically handle someone else's business card, can mean different things to people from different places (see 3.6.10). In some countries it is very important that one treats a business card almost with reverence. This study showed that the awareness of this small adjustment can help an expatriate avoid offending someone and make a good impression.

From these findings the researcher concludes that there are many differences that expatriates will encounter in a cross-cultural workplace. It is crucial that they are aware of their own values, norms and preferences and that they also acquire information about the values, norms and preferences of the people in their new cultural domain. This includes the deeper values and beliefs, as well as the more practical matters of how certain tasks are accomplished. Mistakes are inevitable, but this knowledge will help expatriates to make fewer mistakes. It will also help them to interpret the behaviour of others and decrease incidences of making wrong assumptions. Expatriates will not agree with or like everything in the new cultural domain, but armed with the necessary information, they can move forward with the least amount of frustration and misunderstanding. It is also important to note that the awareness of the differences is not the end, but rather the means to bridging the gaps and facilitating positive communication and interaction (see Section 2.4).

6.5 COMMUNICATION RELATED CULTURAL DIMENSIONS

Communication is an important part of daily life. For expatriates, communication is complicated by many more additional variables than they would have back home (see Section 4.1). Speaking a new language is the most obvious difference that expatriates may have to experience in the area of communication, but it is not the only difference. Well over half of the expatriates in this study learnt a new language; most of whom found language learning necessary to live (see 4.2.1). A few expatriates could have got by without learning the local language but chose to learn it nonetheless. It was shown in this study that quite a few

expatriates regretted not taking the time to learn the local language, as it would have enriched their foreign experience.

Individual circumstances play a huge role in whether or not a new language needs to be learnt. Both extremes exist: in some cases there is no language difference between the two countries and in other cases, knowing the language is necessary for survival. However, most expatriate scenarios lie somewhere in between these two extremes. Some expatriates had a choice as to whether they learnt the language or not and many factors played a role in this decision (see 4.2.1). In this study it was shown that when learning the language was not mandatory, the choice was especially based on if the expatriates had time, if they had a desire to learn and how much they wanted to integrate into the local community.

If a different language was spoken in the expatriate's new country, the decision whether or not to learn the language was shown to have many implications. Usually the initial cost was high, mostly in terms of time and sometimes in terms of money. Expatriates who were there only to make money and who were able to communicate with locals and do daily tasks, often considered the cost of learning the language too high. However, for expatriates who paid the cost at the beginning, the rewards were great. The expatriates who learnt the local language had a better and deeper understanding of the cultural values and behaviour of the people with whom they came in contact. They were able to form friendships in the local language and integrate more deeply (see 4.2.1).

Many expatriates in this study expressed a lot of frustration in dealing with differences regarding *language pace* (see 4.2.2). Indeed this difference caused several of them a lot of stress, but until this question was asked, they were not even able to recognize what had been bothering them. This is a more 'hidden' dimension that people are not always aware of. Once the expatriates recognized this problem, however, many were able to make the necessary adjustments as they communicated with other people. The change was not always easy, but at least it was easier when they realized what the problem was. This is an important example of how knowing about these cultural dimensions beforehand can help expatriates in their relocation process.

Knowing the cultural norms regarding *formality* in communication also helped expatriates in this study, as was demonstrated by the findings (see 4.2.3). These rules regarding *formality*

exist in every cultural domain and it can be very uncomfortable for a visitor who is not familiar with the rules. Some of these norms (for example, the appropriate way to use titles in addressing people) can be learnt and one can avoid embarrassment or offence by knowing them. Most expatriates who were interviewed found a cultural difference in this area, but most of them had more difficulty actually finding out what was appropriate than adapting to the change itself.

In addition, knowing how *directly* or *indirectly* people speak in a certain cultural domain was shown to be helpful (see 4.2.4). Most expatriates in this study moved into cultural domains that favoured more *indirect communication*. In these cases, it was important for the expatriates to speak in a way that was not offensive and they also needed to learn to read *non-verbal* cues to see what the other person was actually communicating. In these ways, misunderstandings were minimized. They also needed to understand the values of the people in their new cultural domains. This helped them not to place value judgments on the other person's behaviour, for example not telling 'the truth' was sometimes the culturally appropriate thing to do and was not always for the purpose of being deceitful.

If the expatriates understood the cultural norms in their new *domain*, it was shown in this research that it helped them avoid making wrong interpretations and judgments about other people's behaviour. Using strong emotions and heated words in a business meeting could be wrongly interpreted as someone being angry when in fact this could be the normal way that people express themselves in a different cultural domain. If using strong emotion is important to communicate in a certain cultural domain, an expatriate who is not used to that style of communicating may need to learn to show more emotion to be heard and understood by the local people. However, knowing what is culturally appropriate does not mean that the expatriate must adopt the behaviour of the people in the new cultural domain. Showing emotion is not only a cultural dimension; individual personality also plays a big role in how people choose to express themselves (see 4.2.5).

Disagreements are common in relationships and can have positive or negative results, often depending on the way they are handled. Expatriates must not assume that their way of showing disagreement is appropriate in their new cultural domain. Knowing about this difference will not ensure that another person will not be offended, but it can help. Some people speak very *directly* and even use strong or harsh language and this can be offensive to

someone who is not used to such behaviour. This is especially true in countries where group harmony and saving face are very important cultural values. If a Western expatriate works for an Asian company in Asia, implementing his/her ideas about constructive confrontation may backfire on him/her. It is important to be able to disagree with others, but also to be able to express one's disagreement in a way that other people can hear and accept what is being communicated. Of course there are many variables in this equation and different situations (like two people in a business meeting and the same two people on a golf course) may be handled differently (see 4.2.6).

In some cultural domains, 'yes' and 'no' have both *verbal* and *non-verbal* dimensions. In some places in Africa and Asia, a man can say the word 'yes' in answer to someone's question, but his meaning can actually be 'no'. When he says 'yes' it can mean 'I hear you' rather than 'I agree with what you said'. Unless one is aware of these cultural differences in communication, it is obvious that misunderstandings will occur (see 4.2.6).

It was shown in this study that if someone asks a question or makes a statement in a group situation, silence by the group can have different meanings (see 4.2.6). In some cases, people in a group will remain silent if they agree, but in other situations, people remain silent if they disagree. It is important for expatriates to be aware of the meaning of silence if they participate in group discussions.

Non-verbal cues have been mentioned in some of the above discussion as they are intricately tied in with *verbal communication*. *Non-verbal* cues play a large roll in communication but the *meaning* of certain behaviours and expressions vary in different cultural domains (see Section 4.3). It is extremely important for expatriates to learn what is appropriate in their new *domain*, both to communicate effectively as well as to understand what other people are communicating. If an African man wants to walk hand-in-hand with a Western expatriate, it does not mean that he is making a sexual advance, it is simply a gesture of friendship (see 4.3.1). In some cultural domains showing the sole of one's shoe or foot to someone can be a huge insult and must be avoided (see 4.3.8). The appropriate use of eye contact also varies between different cultural domains (see 4.3.4).

As each expatriate's situation is unique, it is not possible to make broad generalizations about *verbal* and *non-verbal communication* differences, however, this research proved the

necessity to learn about appropriate *non-verbal* cues in a new *cultural domain*. It is beneficial for expatriates to learn about the differences in communication before they arrive in their new country.

6.6 ISSUES RELATED TO THE EXPATRIATE'S ADJUSTMENT

Expatriates have many adjustments to make, both in their work and social environments. As was shown by the results of this study, a previous knowledge about what can be expected is very helpful. Although it did not prevent all of the difficulties, it did help many expatriates to work through them.

Books written for expatriates regarding cultural adaptation and *culture shock* often describe the different stages that expatriates are likely to go through when they relocate (see 1.4.1; 5.2.1). In this research, most of the expatriates experienced something very similar to the 3-stage pattern which was described in Section 5.2.1. Every person is unique, as are their experiences, but a general pattern was seen in the relocation process, which can serve as a guide to expatriates. The knowledge that *culture shock* is a normal stage of the expatriate episode was found to be extremely helpful for those relocating, especially as most of the expatriates did experience it (see 5.2.2).

The diagrams given in some literature (Kohls 2001:100; Marx 1999:10) are very simplistic and are helpful as a basic guide; however, the actual process of learning to live in a different cultural domain is very complex in real life. The different stages are not clearly demarcated and expatriates are often unaware of the stages during their adjustment. Having people to encourage them through the process was found to be invaluable. This research also showed that often the stages were more cyclical than linear; the expatriates seemed to go through the different stages several times (see 5.2.1) both in different countries and in different aspects of daily life.

This research identified the various negative emotions experienced by expatriates during their time of transition (see 5.2.2.1). Expatriates felt inner turmoil, often expressed as depression, frustration and fear that they would not be able to cope. Many expatriates who were senior managers had the additional stress of wanting to give the impression that they were doing

well, even when they were experiencing deep inner turmoil. This was found at times to be a very lonely and scary experience and many of those who were unaware that this is a normal phase questioned their decision to relocate.

Expatriate spouses who did not have a job, experienced deeper feelings of loneliness and isolation (see 5.2.3.3). They had lost their support system from back home and did not get the ‘pats on the back from a job well done’ that their working spouses did. They usually had more time on their hands and had to deal with the many mundane details of daily life. Expatriate children also felt extreme feelings of loneliness. The experiences of children fell outside the scope of this research and would be a valuable study in the future.

One of the most surprising results for the researcher was that prior knowledge of *culture shock* did not reduce its occurrence; however, it did significantly help the expatriate to get through it (see 5.2.2.2). This part of the expatriate episode can be likened to having an operation. People who choose to have an operation know that when they wake up from anaesthesia they will experience pain. This does not decrease the amount of pain that they will experience, but it does help them emotionally to expect it and to understand that this is a normal part of the healing process. In the same way, expatriates who know that they will suffer difficulties of a cultural nature, can cope with them better. It helps reduce the self-doubt of ‘what’s wrong with me’ to realize that it is a normal part of the adjustment process during the expatriate episode.

Relationships with other people were shown to be a significant part of the support system for most expatriates in this study (see 5.2.3). Except for their immediate family, expatriates physically leave their significant relationships behind when they relocate. It takes time to develop close friendships in a new country. For some expatriates, making friends with other expatriates in the new country was what helped them the most, as they could relate to each other’s experiences and provide information and support. For other expatriates, making friends with the local people in the new country was what helped them the most, as in the course of these relationships, expatriates learnt to understand, appreciate and respect the people in their new country. From them they learnt not only about the customs of their new cultural milieu, but also about the deeper values behind their behaviour.

A significant number of expatriates who were interviewed were helped in their adjustment process by making deliberate choices to integrate into the new cultural domain (see 5.2.3). This included choices to change both their attitudes and their behaviours. Some expatriates chose to be positive even when they did not feel like it and others chose to go out and meet the local people when they would rather have stayed at home. Expatriates need to realize that there are certain things that will help them to adjust and they need to choose to do them even when they would rather be doing something else. Having a positive attitude is important, as is building friendships with the local people. Many other choices will be unique to different expatriates in their particular circumstances.

Understanding more about the people in the new country proved to be very important in helping expatriates to become culturally literate. Learning about the history of the people in the new country was important for expatriates to understand the present behaviour. Without knowing the greater context, incorrect assumptions and decisions can be made. Other things that helped expatriates to adjust were: getting involved in local as well as expatriate activities, maintaining their faith in God and going to church, learning the local language, the passage of time and receiving support from back home (see 5.2.3).

From the research results, a comparison between the results of male and female expatriates showed that friends and family helped the women to adjust more than the men (see 5.2.3.1). Non-working expatriate spouses needed to find ways to develop a new support network. It was surprising for the researcher that men scored higher in the category of religion helping them to adjust to the new cultural milieu than women did.

A comparison between what helped expatriate workers and non-working spouses to adjust was also made (see 5.2.3.2). Even though the category of friends and family was the most helpful for both groups, non-working spouses needed these relationships even more than working expatriates did. Non-working spouses are usually responsible for the day-to-day running of the household, shopping and caring for children and they needed help to do many of these things. Also, most working expatriates had relationships with other people in their working environment, which their spouses did not have. It was therefore not surprising for the researcher that this study found that the non-working spouse had a more difficult time adjusting than the primary worker (see Storti 2001:15-18; Marx 1999:107-111). The personal cost of relocating to a new country is usually higher for spouses and they have to figure out

many new things in the new country. The worker often gets affirmation in his job situation and has a natural environment in which to develop relationships. Many non-working spouses are lonely until they develop friendships and the other parts of their new support structure.

The adaptation issues that children faced were not specifically addressed in this research, but for the purpose of providing helpful information for expatriate families, parents were asked what helped their children to adjust (see 5.2.3.2). Overwhelmingly parents reported that friends and family helped their children to adjust the most and learning the language was the second highest category of response.

Although it was not a specific objective of this research, it became apparent in the course of the interviews that it was important to examine not only difficulties and differences, but also to see what expatriates learnt during their expatriate episode. Many lessons were learnt as a result of living in another country (see 5.2.4). The most important lesson that more than half of the expatriates in this research learnt was the acceptance of diversity (see 5.2.4.1). This was very important for the expatriates to be successful in living in their new cultural domain. Once the expatriates realized that the way things were done in the new country was different, they also needed to learn that different was not wrong, it was just different. This proved to be an important step in being able to adapt their behaviour to be successful in a different country. Almost half of the expatriates had to learn to adjust their attitude or approach in order to be successful (see 5.2.4.2). Another benefit of living as an expatriate was the personal growth that most expatriates in this study experienced (see 5.2.4.3). Being confronted with other people's values made them more aware of their own values. Expatriates often needed to overcome difficulties and as a result they grew stronger.

When expatriates *repatriate*, their expatriate episode is completed. Moving back home was more difficult than moving to the new country for more than half of the expatriates in this study (see Section 5.3). Many expatriates had the false notion that moving back home would be easy. They did not recognize how much they had changed and grown. Many had seen new values and customs and no longer just accepted the way things were done in their home country. Upon returning home, many expatriates in this study felt judgmental towards their family, friends and fellow-countrymen for their narrow-mindedness. They also felt lonely because people at home had moved on with their lives and the returning expatriates had missed out on this. On the other hand, some expatriates were very glad to be home again and

fitted right in where they had left off years before. It is important for returning expatriates to be aware that they have changed and to expect that they may have some difficulty in adjusting.

6.7 CONCLUSION

The objectives stated at the outset of this dissertation have been met. It was seen that the research of Hofstede (1994) is still relevant, (some concluding remarks about this will be mentioned later in this section). The adaptations that expatriates face in their work and social environments were identified, and comparisons were drawn between workers and non-working spouses. Results regarding how expatriates overcame their difficulties were also expounded. Using e-mail as a method of doing virtual interviews with many people living far away from the researcher proved to be very successful in this research.

A practical secondary benefit of this study is that it provides helpful information for expatriates-to-be (see 5.2.5, 5.2.6). It was found that many expatriates wished that they had obtained more information about the history and the people of the new country before they relocated. They also wished they would have understood more about *culture shock* and the different stages that they would go through during their adaptation process. There is information in books and on the Internet that expatriates should take the time to read before they relocate. Attending a cultural training programme is another option for many expatriates. Many companies provide this for their expatriate managers and employees. (This training entails such things as learning about the history of the country, coming to recognize one's own cultural values and those of the people in the new country, behaviours such as greeting and rules of etiquette, the stages of expatriate adjustment, etc.) This is helpful for expatriates to understand their new socio-cultural environment as well as understand what difficulties to expect so that they do not feel that they are abnormal when they experience difficulties. Planning is a key factor in a positive expatriate experience. If possible, expatriates should visit the new country before they relocate, both the worker and the non-working spouse.

Since the data for this dissertation has been compiled, the question regarding the relevance of Hofstede's research findings for the 21st century has been raised in cross-cultural management

literature. Holden (2002:34) writes that Hofstede's paradigm is virtually uncontested and also the *'fact that Hofstede's data were gathered some 30 years ago and apply to a world that no longer exists seems to be generally ignored'*. He also writes that *'there is discernible feeling among scholars of international management that the time has come for fresh ideas and approaches, for a new, post-Hofstedian view of the world'* (Holden 2002:20).

Holden suggests that firms today are more concerned with managing cross-cultural interactions, which are neutral and positive, rather than managing cross-cultural differences, which are potentially divisive and negative (see 2002:20, 34). The researcher agrees with this argument; however, no new model has yet been described and this was not the objective of this study. The fact that at least 80% of participants still found differences in each of Hofstede's dimensions shows that these issues are currently still relevant. It is important to note that recognizing these differences is not an end in itself, rather a stepping-stone to facilitate positive interactions. *'Globalization is creating the need for new ways of understanding, managing and down-playing cultural differences, whilst creating new kinds of cross-cultural formats such as multi-cultural project teams with fluctuating memberships, varying longevity and locales of activity, which are impermanent, shifting and increasingly electronically created'* (Holden 2002:45). This is especially applicable to workers in the workplaces, who fit in and are shielded by their work environment, but outside of the workplace, workers and their spouses are not afforded this luxury.

Of course Holden is writing from the business and corporate perspective. The fact remains that being culturally aware is a crucial factor to have a successful expatriate episode, for workers, non-working spouses and children alike. Most expatriates are exposed to new values and behaviours when they relocate and recognizing these differences is one of the first steps to bridging the gap (see Section 2.4).

The fast moving pace of globalization makes it difficult to formulate a neat and tidy model that describes the complex relationships in the world today. The quest is on *'for new concepts of cultural complexity with greater explanatory power'* (Holden 2002:58). It is the hope of the researcher that this will continue to be addressed in future research and that this dissertation will be instrumental in this process.

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ANNEXURE A

EXAMPLE OF A TYPICAL EXPATRIATE LIFE HISTORY*

John and Carrie grew up near Chicago in the Midwest part of the United States. They met at university in Chicago, got married just after graduation and began their respective careers. Carrie stopped working when their second child was born. John worked for XYZ, a large international electronics company, and by the age of 32 he held a middle management position. Life was good; he had a happy family, enjoyed his career and earned a good salary.

One day John was approached by the CEO of XYZ and asked if he would consider being transferred to Hungary for three years. There were some difficulties at the branch there and the Managing Director in Budapest had been fired. John had been there twice on business, he liked the work set-up there, as well as the people he had met. He was offered the MD position in Hungary, which meant a salary increase and he knew it would look good on his CV. He was very excited about being offered the position and could not wait to tell his wife that evening.

Carrie was shocked, excited and scared. They began long discussions, examining all of the pros and cons and asked advice from friends and family. After two weeks they both agreed to accept the offer. They began reading all they could about life in Hungary. The company wanted John there as soon as possible. They had seven weeks before they had to move and during that time John spent a week in Budapest, both to handle some company business as well as to look for housing for his family. His company sent John on a 1-day cross-cultural training course to help prepare him to work in Hungary. John found it very helpful and wished his wife could have attended, especially the part on *culture shock* and adaptation. But, he figured he had been there twice, they were both intelligent and adaptable people, so they should not have problems adapting to life there.

They had many decisions to make regarding what they would do with their house in Chicago, what they should take with them and what they should store, as well as all of the emotional issues regarding saying goodbye to family and friends. John found a non-furnished house in Budapest and the company paid for their moving costs, so they decided to ship most of their furniture and belongings and to keep the rest in storage in Chicago. Carrie was somewhat apprehensive, because she had no idea what to expect, but she wanted the best for her husband and his career. She felt that she was sacrificing a lot, but it would be worth it in the end.

When they arrived in Budapest, they stayed in a hotel for the first few weeks while they were waiting for the container to arrive with their furniture. There were many practical things to sort out, such as buying two cars, figuring out where the shops were, getting their phone hooked up etc. Everything took longer than they had planned. John helped as much as he could, but he had so many urgent things at work to sort out that most of the work had to be done by Carrie. This was difficult for her because she had two small children, she did not know anyone there and she could not speak Hungarian. She was told that many Hungarians speak English, but she did not find this to be true. She eventually found a babysitter and they hired a Hungarian who spoke English to help Carrie with many of the practical things.

* Pseudonyms have been used for names and institutions.

John faced huge challenges at work, but he felt important and powerful and many of his needs for affirmation and control were met. He came home exhausted but happy. Carrie only had John to talk to at first.

They eventually moved into their new house. Carrie thought she would have time for some of her hobbies, but she found she had neither the time nor the energy to do them. She became lonely and depressed. A couple of her neighbours spoke some English, but they were working professionals and had little time for socializing. She phoned her family and friends in the USA often. She began secretly drinking alcohol as an escape. There were three other expatriate couples working for XYZ Company in Budapest and the wives had brought her gifts and invited her for coffee at their homes. But, as ‘the boss’s wife’, she did not feel that she could open up to them about her struggles.

John was doing well at work. The training course he went on helped him to understand some of the things at work that he would not have understood before. There were many things he did not know, but at least he knew many of the right questions to ask. Since he was only going to be there for three years and since all of his managers spoke English, he decided not to take the time to learn the Hungarian language as it is a difficult language and it was not high on his priority list. He was exhausted in the evenings, but tried to make time for Carrie and the children. He could see that Carrie was having a difficult time and he encouraged her to meet new friends.

When she put her four-year old child into a crèche, she met other mothers and began spending time with them. Making Hungarian friends helped her to be less lonely and when she was comfortable enough with them to ask questions, she began to understand some of the Hungarian values and customs. She also started attending an American Women’s Club that met once a month. Only then did she realize that she was not alone in her struggles, most of the other expatriate women had also experienced many emotional difficulties when they moved to Hungary. She gradually learnt to enjoy life there.

There were many ups and downs in the three years that they lived in Hungary and they could hardly believe it when it was time to go home again. John had done a good job of turning around a potentially bad situation at work and the company was doing well. He had trained a Hungarian to take over as the MD when he left. They were looking forward to going back to Chicago, but a part of them wished they could stay. There were many emotional good-byes to friends they had met in Hungary, but they were excited about going home again.

It was fantastic for them to see their family again and to be back in their own home. The children did not remember their house and barely remembered their grandparents. They were eager to see their friends, many of whom they had kept in touch with via e-mail. John and Carrie wanted to show them photos and tell all about their experiences in Hungary. They were disappointed, however, that most of their friends and even their family, did not really want to hear all about life there. They were actually more interested in telling John and Carrie about what had happened to them in the meantime. John and Carrie struggled with being judgmental about the narrow-mindedness of their friends and they realized that they had actually grown and changed quite a bit as a result of living in a different country. They were happy about their growth, but also felt lonely, as no one really understood what they had been through and few people seemed really interested.

Eventually they met other Americans who had lived overseas as well and found that they had a lot in common with them. They also befriended two foreign families in their neighbourhood, as they knew what it felt like to be expatriates. John adjusted back at work. He had learnt a lot in Hungary but found that the managers in Chicago were not really all that interested in implementing some of the things he had learnt. He received a promotion, but was not really all that happy at work. Eight months later he was offered a position in the Netherlands and six weeks later they began the relocation cycle all over again.

ANNEXURE B CONSENT MESSAGE FOR E-MAIL RESPONDENTS

Research project:

The expatriate episode: an investigation into the cultural dimensions of relocation

My name is Kathi Tarantal. I am a graduate student in the Department of Anthropology at the University of Pretoria where I am doing research on the 'expatriate experience' with special reference to the difficulties experienced by expatriates both during their stay in another country and on their return to their home country. Anyone who is presently living or has in the past lived in another country for a period of at least one year is a potential participant in this study.

Will you please assist me by responding to my questions via e-mail? Your participation is totally voluntary and you may withdraw from the interviews and discussions at any time without any negative consequences. I promise to take up as little of your time as possible.

There are no foreseeable risks or discomforts for participants. A possible immediate benefit is a better understanding of your own expatriate experience. The results of my research will eventually also be made available to all participants. There will be no compensation in cash or in kind for participating in this study.

Your identity will be kept confidential. In my dissertation and reports, pseudonyms will be used to protect your identity. Any traceable reference that may reveal your identity or your name will be kept confidential. I plan to store the raw data at my home for as long as it is feasible to use them for research purposes after which they will be destroyed. Please keep in mind that the e-mail environment is not secure and that despite my efforts, your anonymity may be compromised.

You are welcome to contact me at any time if you need more information or if you want to ask specific questions about my research project or myself. My phone number is 27-82-650-1914. Alternately you may email me at tarantal@mweb.co.za.

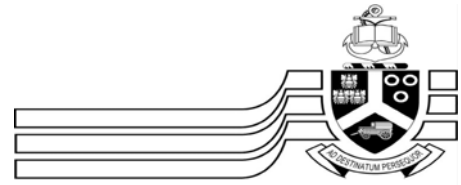
Authorisation

If you are willing to participate in this study, please paste the authorisation below to your reply message. I will then file it with your e-mail address and contact you in due course.

I understand the objectives of Kathi Tarantal's research and I have read her e-mail message.
I voluntarily consent to participate in the intended e-mail discussions and interviews.

Thank you in advance for your participation.

Kathi Tarantal



University of Pretoria

Pretoria 0002 Republic of South Africa
 Department of Anthropology and
 Archaeology
 Tel: (012) 420-2598

**ANNEXURE C
 CONSENT FORM FOR FORMAL INTERVIEWS**

Research project:

The expatriate episode: an investigation into the cultural dimensions of relocation

My name is Kathi Tarantal. I am a graduate student in the Department of Anthropology at the University of Pretoria where I am doing research on the 'expatriate experience' with special reference to the difficulties experienced by expatriates both during their stay in another country and on their return to their home country.

Will you please participate in my research project by joining in the discussions and interviews?

I will do my utmost to ensure your anonymity in all my written reports and I do not expect you to divulge any information that might compromise you in any way. All information will be treated as confidential and you may withdraw from discussions or interviews at any time without any consequences.

I will provide you, upon request, with any additional information on my research project and answer any questions about my studies, my research methods, and myself. You may also contact me at the following telephone number: 27-82-650-1914. Alternately you may e-mail me at tarantal@mweb.co.za.

I, the undersigned, have read the above and I understand the nature of the research project of Kathi Tarantal and my potential role in it. I voluntarily consent to participate in all discussions and interviews.

Full name of participant	Signature of participant	Date

ANNEXURE D

Power distance index (PDI) values for 50 countries and 3 Regions

Score Rank	Country or Region	PDI Score	Score Rank	Country or Region	PDI Score
1	Malaysia	104	27/28	South Korea	60
2/3	Guatemala	95	29/30	Iran	58
2/3	Panama	95	29/30	Taiwan	58
4	Philippines	94	31	Spain	57
5/6	Mexico	81	32	Pakistan	55
5/6	Venezuela	81	33	Japan	54
7	Arab Countries	80	34	Italy	50
8/9	Ecuador	78	35/36	Argentina	49
8/9	Indonesia	78	35/36	South Africa	49
10/11	India	77	37	Jamaica	45
10/11	West Africa	77	38	USA	40
12	Yugoslavia	76	39	Canada	39
13	Singapore	74	40	Netherlands	38
14	Brazil	69	41	Australia	36
15/16	France	68	42/44	Costa Rica	35
15/16	Hong Kong	68	42/44	Germany FR	35
17	Colombia	67	42/44	Great Britain	35
18/19	Salvador	66	45	Switzerland	34
18/19	Turkey	66	46	Finland	33
20	Belgium	65	47/48	Norway	31
21/23	East Africa	64	47/48	Sweden	31
21/23	Peru	64	49	Ireland (Republic of)	28
21/23	Thailand	64	50	New Zealand	22
24/25	Chile	63	51	Denmark	18
24/25	Portugal	63	52	Israel	13
26	Uruguay	61	53	Austria	11
27/28	Greece	60			

Hofstede (1994:26)

ANNEXURE E

Uncertainty avoidance index (UAI) values for 50 countries and 3 regions

Score Rank	Country or Region	UAI Score	Score Rank	Country or Region	UAI Score
1	Greece	112	28	Equador	67
2	Portugal	104	29	Germany FR	65
3	Guatemala	101	30	Thailand	64
4	Uruguay	100	31/32	Iran	59
5/6	Belgium	94	31/32	Finland	59
5/6	Salvador	94	33	Switzerland	58
7	Japan	92	34	West Africa	54
8	Yugoslavia	88	35	Netherlands	53
9	Peru	87	36	East Africa	52
10/15	France	86	37	Australia	51
10/15	Chile	86	38	Norway	50
10/15	Spain	86	39/40	South Africa	49
10/15	Costa Rica	86	39/40	New Zealand	49
10/15	Panama	86	41/42	Indonesia	48
10/15	Argentina	86	41/42	Canada	48
16/17	Turkey	85	43	USA	46
16/17	South Korea	85	44	Philippines	44
18	Mexico	82	45	India	40
19	Israel	81	46	Malaysia	36
20	Colombia	80	47/48	Great Britain	35
21/22	Venezuela	76	47/48	Ireland (Republic of)	35
21/22	Brazil	76	49/50	Hong Kong	29
23	Italy	75	49/50	Sweden	29
24/25	Pakistan	70	51	Denmark	23
24/25	Austria	70	52	Jamaica	13
26	Taiwan	69	53	Singapore	8
27	Arab Countries	68			

Hofstede (1994:113)

ANNEXURE F

Individualism index (IDV) values for 50 countries and 3 regions

Score Rank	Country or Region	IDV Score	Score Rank	Country or Region	IDV Score
1	USA	91	28	Turkey	37
2	Australia	90	29	Uruguay	36
3	Great Britain	89	30	Greece	35
4/5	Canada	80	31	Philippines	32
4/5	Netherlands	80	32	Mexico	30
6	New Zealand	79	33/35	East Africa	27
7	Italy	76	33/35	Yugoslavia	27
8	Belgium	75	33/35	Portugal	27
9	Denmark	74	36	Malaysia	26
10/11	Sweden	71	37	Hong Kong	25
10/11	France	71	38	Chile	23
12	Ireland (Republic of)	70	39/41	West Africa	20
13	Norway	69	39/41	Singapore	20
14	Switzerland	68	39/41	Thailand	20
15	Germany F.G.	67	42	Salvador	19
16	South Africa	65	43	South Korea	18
17	Finland	55	44	Taiwan	17
18	Austria	54	45	Peru	16
19	Israel	51	46	Costa Rica	15
20	Spain	48	47/48	Pakistan	14
21	India	46	47/48	Indonesia	14
22/23	Japan	46	49	Colombia	13
22/23	Argentina	46	50	Venezuela	12
24	Iran	41	51	Panama	11
25	Jamaica	39	52	Equador	8
26/27	Brazil	38	53	Guatemala	6
26/27	Arab Countries	38			

Hofstede (1994:53)

ANNEXURE G

Masculinity index (MAS) values for 50 countries and 3 regions

Score Rank	Country or Region	MAS Score	Score Rank	Country or Region	MAS Score
1	Japan	95	28	Singapore	48
2	Austria	79	29	Israel	47
3	Venezuela	73	30/31	Indonesia	46
4/5	Italy	70	30/31	West Africa	46
4/5	Switzerland	70	32/33	Turkey	45
6	Mexico	69	32/33	Taiwan	45
7/8	Ireland (Republic of)	68	34	Panama	44
7/8	Jamaica	68	35/36	Iran	43
9/10	Great Britain	66	35/36	France	43
9/10	Germany FR	66	37/38	Spain	42
11/12	Philippines	64	37/38	Peru	42
11/12	Colombia	64	39	East Africa	41
13/14	South Africa	63	40	Salvador	40
13/14	Ecuador	63	41	South Korea	39
15	USA	62	42	Uruguay	38
16	Australia	61	43	Guatemala	37
17	New Zealand	58	44	Thailand	34
18/19	Greece	57	45	Portugal	31
18/19	Hong Kong	57	46	Chile	28
20/21	Argentina	56	47	Finland	26
20/21	India	56	48/49	Yugoslavia	21
22	Belgium	54	48/49	Costa Rica	21
23	Arab Countries	53	50	Denmark	16
24	Canada	52	51	Netherlands	14
25/26	Malaysia	50	52	Norway	8
25/26	Pakistan	50	53	Sweden	5
27	Brazil	49			

Hofstede (1994:84)