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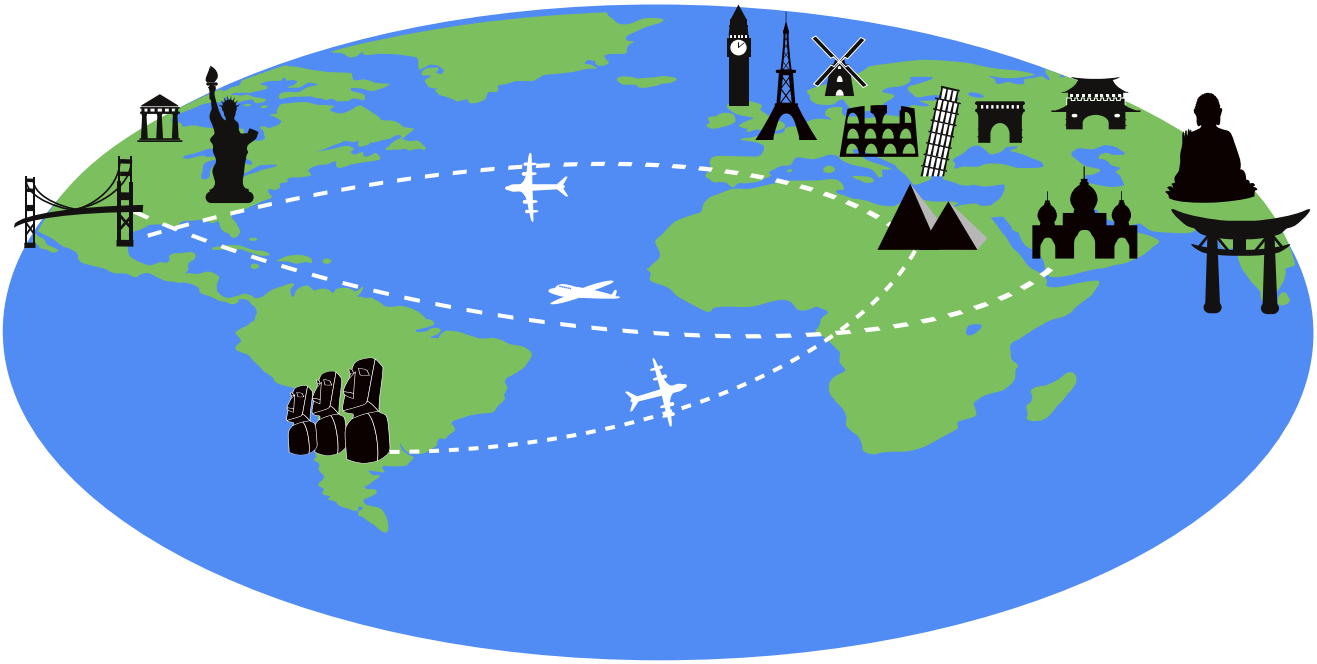

Culture and Overseas Work: Expectations, Preparations, Coping, Return

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Special thanks or other notes...

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Introduction

This white paper provides an overview of the experiences and challenges encountered by people who live and work outside of their home societies and introduces some of the solutions currently available to meet these challenges. The term *sojourners* is broad and includes all kinds of overseas experiences, including work, study, migration, diplomacy, proselytizing, and tourism. Expatriates (aka expats), the focus of this paper, are often categorized as corporate or self-initiated, the former group sent overseas by an employer, perhaps for several years, whereas the latter moves overseas to seek employment (Shaffer, Kraimer, Chen, & Bolino, 2012). Psychologists who study expatriation are primarily interested in adjustment (i.e., psychological well-being and social adjustment to the local culture and people) of the worker and performance in the overseas assignment. Companies send workers overseas with specific business goals that are best met by employees who adjust and perform well. Although it has proven difficult to estimate reliably the prevalence of expat failure (Harzing, 1995), the cost to a company of a failed overseas assignment—characterized by some combination of poor performance, lack of adjustment, and early return—is high (Ward, Bochner, & Furnham, 2001). The varied costs of a failed sojourn to the employee are likewise prohibitive.

Expat adjustment and performance are linked to a variety of situational and psychological factors, several of which we introduce in this paper. A substantial subfield of international work and organizational psychology (iWOP) investigates the relationships among variables that predict and foster success, mitigate distress, and generally explores the complexity of "cross-cultural competence" or 3C (Kraimer, Bolino, & Mead, 2016). We will discuss the most critical issues for overseas workers and provide some advice, beginning with a brief overview of the types of cultural differences that matter to most expats' experiences and outcomes.

Differences That Matter

It is important to precede a discussion of cultural differences with a crucial caveat that can be summarized as "within is greater than between." On any value or personality dimension used to contrast two societies, the variability within each society is almost always greater than the difference between them (Fischer & Schwarz, 2011). Much of what passes for informed wisdom about the Other (people in other societies) is stereotyping: an overgeneralization with a grain of truth. Also, some—perhaps a great deal—of the behaviors that we assume arises from people's internalized cultural values and beliefs, are actually responses to the situations in which they find themselves. As situations differ markedly across cultures, so must behaviors. The challenge facing a culture traveler is to tease out what in others' behaviors are due to (a) internalized culture, (b) personality differences among people within the society, and (c) the situations in which they are embedded as

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you encounter them. Even when a cultural difference clearly exists (e.g., Chinese people show more respect for authority than Americans), it is important to avoid the common error ("ecological fallacy") in assuming that the cultural difference applies to everyone, for example, all Chinese show more respect for authority than all Americans. How can this culture-person-situation judgment be made with any confidence? Ultimately the sojourner must assume the role of (amateur) anthropologist: (a) Observe obsessively; (b) find "culture brokers" (people who can competently move between both cultures) and ask questions; (c) withhold judgment until (and if) a seemingly adequate understanding is achieved.

That culture is characterized in so many ways in the academic literature is not helpful to expatriates, but research tempered with experience suggests that certain cultural differences are most consequential for an expat's adjustment and performance. Here, we introduce a few factors that we view as most critical: norms, tightness, group orientedness, power, communication, pace of life, and corruption.

Norms include what people are expected to do, or not do, in specific situations as well as what they most commonly actually do. Gaining an adequate knowledge of local norms is a necessary and easily accomplished component of "predeparture training." The home and host society may differ in normative tightness (vs. looseness). Tight societies are characterized by "strong situations" in which behavior is restricted to a narrow band of permissible options, norms are enforced closely, deviance is not tolerated, and as a result people must take greater care to behave appropriately (Gelfand, Nishii, & Raver, 2006). In some tight societies, norms are regulated by religion, but in others social controls are largely secular. Relatively tight societies are found in Asia and the Middle East, whereas comparatively loose societies are found in Western and Central Europe and "Anglo-heritage countries" (UK, USA, Canada, Australia, and New Zealand). Tight societies favor strong, decisive leaders who engage in detailed performance monitoring. Workers in tight societies expect more detailed instructions and less latitude in thinking for themselves, and managers, likewise, are given less flexibility in their decisions. Establishing trust in the workplace across differing degrees of tightness, either between managers and employees or among employees, can be complicated, so expats will need to be patient, as building trust may take longer than they expect.

Group orientedness, the extent to which a culture emphasizes the individual versus the group is viewed in anthropology and sociology, as well as iWOP, is one of the fundamental distinctions among societies recognized by anthropologists and sociologists (e.g., Hsu, 1981; Parsons & Shils, 1951). The concept is referred to as collectivism (vs. individualism) in Geert Hofstede's dimensional architecture of societal values (Hofstede, Hofstede, & Minkov, 2005), as well as in the Global Leadership and Organizational Behavior (GLOBE) study conducted by I-O psychologists (House, Hanges, Javidan, Dorfman, & Gupta, 2004). Shalom Schwartz (2006) labelled it embeddedness. The world is for the most part group oriented; the exceptions are northern Europe and the Anglo heritage countries. In group-oriented societies, institutions, norms, and values favor groups or communities over individuals across many domains, although the details of this preference can vary greatly from culture to culture. For an expatriate, several domains are especially relevant: relationships, leadership, personal freedoms, group/team behavior, definitions of morality, and workplace culture. The basis for most of these domains is relationship dynamics. In group-oriented societies, critical distinctions are maintained among family, friends, acquaintances, and strangers. Families are strong and entail obligations that provide mutual support inside the family but not necessarily prosocial behavior outside of it. Friendships develop slowly but run deep, may last a lifetime, and involve consequential obligations as well. A "friend" is a friend indeed, defined more narrowly so as to exclude mere acquaintances, in contrast to the broad, fuzzy way the term is used in individualist societies. As a guest, you may receive "honorary friendship" treatment that is warm, generous, and considerate but, being honorary, may not be long lasting. Expats who hope to make local friends must learn to judge the nature of their relationships accurately and devote substantial time and effort to forming authentic friendships. "Face"

matters because social reputation in a highly networked society opens doors, as well as closes them. One's life chances, linked to the quality of one's social capital or network, are supported by the high expectation for reciprocity among members of such networks (Hwang, 1987).

One final word on group orientedness: it is grossly wrong to lump all group-oriented cultures into a single category, as some of their norms and practices are similar across cultures (e.g., strong ingroup obligations) whereas others vary greatly (e.g., physical touching).

Power and power differentials are fundamental to human society and social interaction but differ greatly across cultures. All of the major values-oriented models of culture (Hofstede, GLOBE, Schwartz, etc.) include dimensions concerning the size and acceptance of power differentials, and this dimension is arguably called on most frequently to understand organizational and leadership behavior (e.g., see Gelfand, Erez, & Aycan, 2007). Power differentials are manifested in multiple domains ranging from politics to the workplace, and to families. In high power differential regions, such as Latin America and Asia, we find more autocratic political systems, less support for participative management styles, and greater parental control over children than in low power differential regions, such as Great Britain, Scandinavia, and the Anglo diaspora. In high power differential societies, managers have more power, command more respect, engender greater conformity, and may accrue more obligations for the welfare of their employees. However, as we discussed previously, expats should eschew the ecological fallacy—assuming these general cultural differences apply to all people, situations, and practices.

Emotional Expression, Directness, and Communication.

Effective communication is an ever-present challenge to expats and should never be assumed. The academic field Intercultural Communication has provided a wealth of information about the pitfalls and solutions to the ever-present problem of how to communicate across cultures and languages. Just a few of the most important considerations for expats are provided in this section. First, cultures vary in directness. Americans, and even more so the Dutch, are famously direct in their communications: "Say what you mean and mean what you say." But in many other, often group-oriented societies, indirect communication is preferred as a safeguard to maintaining relationships and avoiding loss of face. One strategy for indirectness is to use go-betweens or mediators to avoid relationship-threatening unpleasantries that might come of direct interaction. Second, although emotions and emotional expressions are cultural universals, cultures differ in display rules—norms concerning which emotions may be openly expressed in different situations (Safdar et al., 2009). Some societies mask their emotions strongly (e.g., Japan), whereas others do not (e.g., USA). Expats moving from high to low masking cultures will find the absence of masking startling, but expats moving in the opposite direction will have difficulty "reading" people. Third, nonverbal communication norms and practices differ considerably. These include use of gestures (e.g., the American peace gesture has a middle-finger meaning in some societies), speech illustrators (what can appropriately be done with one's hands to accompany speech), proxemics (how close one should stand in conversation), haptics (who can touch whom, where, and when), and more. Hygiene norms, such as appropriate control of body odor, are a form of nonverbal communication. Expats should expect to face communication difficulties and should make use of a culture broker to ferret out what is really being communicated.

Should the expat invest in learning the local language? Despite the fact that English is the more-or-less universal language of international business, possessing passable skills in the local language affords several advantages, including being able to understand and perhaps respond to colleagues when they speak their own language as well as facility in getting along with normal life outside the workplace. Several years of intense study are required for most people to reach a functional level of fluency, so the tradeoff is quite clear.

Pace of life has been identified by Peace Corps researchers as one of the most vexing cultural differences, second only to language and communication. Punctuality norms and practices are the basis for culture stereotypes, many of which are accurate. Expats will be expected to follow these norms, but with due consideration for differing practices within versus outside the workplace. Pace of life and punctuality tend to covary, with implications for both the workplace and daily social experience (Levine & Norenzayan, 1999). Active coping skills, discussed in a later section, can mitigate negative emotional responses (aka, rage) to unpleasant pace of life related experiences.

Corruption is pervasive throughout the world, but it takes varying forms. A German organization, Transparency International, tracks corruption in business activities across nations and time (see https://www.transparency.org) and provides considerable background information about the nature and prevalence of corruption. In societies in which corruption is an annoyance of daily life, people learn to deal with it and possibly to circumvent its difficulties through the support of relatives, friends, and networks. For many expats, corruption will seem irrelevant because it has little direct effect on their activities, but for others, it will be visible, troubling, and possibly dangerous. Here again, a culture broker can be invaluable in navigating local practices and identifying solutions.

Given the cultural differences described so far, two obvious questions arise: Who is best suited to work overseas, and how can he or she be prepared best to take on this challenge?

Personality, demographics, and selection for overseas work

Across many studies of personality and overseas outcomes, three conclusions stand out. First, social skills do translate, that is, social skills exhibited in the home society contribute to success of the sojourn if, second, the sojourner has a positive attitude toward things cultural. By this we mean that success is greatest for those who appreciate cultural diversity and new experiences, genuinely like the host culture and its people, and are low in xenophobia, racism, and nationalist arrogance. Third, turning to the classic personality variables, expatriate success is related positively to extraversion, emotional stability, agreeableness, and conscientiousness (Mol, Born, Willemsen, & van der Molen, 2005). Although one would expect success to be related to openness to experience, this is only the case when we consider narrowly only enjoyment of novel stimuli (vs. appreciation of the arts and new ideas, etc.). Demographic and experiential characteristics of the expat matter, with greater age and previous overseas experiences contributing to a better outcome.

Three important characteristics of the sojourner's situation affect success. First, family adjustment: The foremost determinant of a successful overseas assignment is the adjustment of the accompanying family members. If the family is not happy, the expat will not be happy (Bhaskar-Shrinivas, Harrison, Shaffer, & Luk, 2005). Second, culture distance: lesser distance between the home and host societies improves the odds of success (Ward & Kennedy, 1999; but see Bhaskar-Shrinivas, et al., 2005). Culture distance refers to the cultural characteristics described previously as well as ongoing experiences of daily living: the food, climate, majority religion, language, material comforts, and so on. The direction of the sojourn also matters, for example, from high tightness at

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home to low tightness in the host society, versus from low to high (Shenkar, 2012). Third, logistical support is crucial in improving the expat experience, whether it is the aid of a culture broker to help navigate the society or material benefits involving housing, transportation, medical care and the like (Kraimer, Bolino, & Mead, 2016).

The oversees assignment must align with the expatriate's career goals to make the effort entailed in the sojourn worthwhile and to facilitate the positive attitudes that are a prerequisite to success. Furthermore, the employer needs to provide potential sojourners with sufficient information to make an informed decision to go or to stay, a prime source of which is returning expats.

Preparation for overseas work

The intercultural training industry has grown in response to demand for its services, supported by the large organization SIETAR (Society for International Education, Training and Research). Training techniques are naturally proprietary and outcome evaluations are unfortunately inadequate at present in this industry. Most intercultural training is in some way cognitive, that is, focused on cultural knowledge and supported by a wealth of informational resources. In iWOP, the ongoing debate pits teaching culture general concepts, such as the norms and values distinctions discussed previously, against focusing on culture-specific knowledge. The former strategy appears to be in higher repute. However, specifics are needed once a destination is known: greetings rituals (kiss how many times? Which cheeks?), avoidable faux pas (don't use that dirty left hand), awareness of sensitive topics (don't ask about my spouse), and more. Probably the most useful skills the future expat can learn involve coping and "metacognitive" strategies. Acquiring active, problem-resolution coping skills provides a tool that can be generalized across many situations. Specific behaviors, such as appropriate social interaction techniques or scripts and communication skills can also be trained and should extend beyond mere knowledge of what to do and when, to learning how to perform appropriate behaviors competently without uncomfortable awkwardness.

Preparation for expatriation is highly variable across companies, but large firms may provide supports for expats and their families, including general cross-cultural training, language training, and educational or employment support for spouse.

What Could Go Wrong?

The somewhat hyperbolic term "culture shock" originated in anthropology to describe the experiences of field researchers, but many common symptoms of poor social or psychological adjustment, including depression, anxiety, anger/frustration at blocked goals, somatic symptoms of unclear provenance, homesickness, loneliness, loss of self-esteem, racism, rejection of the host culture and people, etc. are displayed by sojourners (Ward, Bochner, & Furnham, 2001). As necessary as preparation is for overseas work, companies also need to provide support on the ground beyond logistics and material resources. Regardless of what this support is called–culture brokering, coaching, counseling, fixing, or posting bail–expats often need a considerable amount of it. They especially need support when unforeseen obstacles appear at work or at home, the local culture begins to wear on the expat and/or the family, "culture shock" sets in, or errors are invariably committed.

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A common, frustratingly resilient, misconception is that sojourners progress through a "U curve" of adjustment that begins with excitement inspired by the novelty of the new culture, is followed by culture shock, then culminates in adaptation and adjustment. Research shows a very different pattern: The more difficult times come very early and the sojourner gradually adjusts over time. Of course, your experience may vary. Metacognitive coping practices can help the expat move beyond early travails; the best is yet to come.

Repatriation

Experience and research have revealed that repatriation—returning home and usually to the original employment situation—is indeed difficult. The terms "re-entry shock" and "reverse culture shock" were coined to dramatize this experience and the (fallacious) U-curve model was extended to a W-curve model. Positive experiences during the sojourn tend to lead to more difficult re-entry, due at least in part to changed identity—the loss of some aspects of the expat's original identity accompanied by the addition of new identities forged overseas. Difficulties arise when the changed identity/person must reconcile with the home situation, including the original job, the community, and perhaps the family, all contributing to a sense of alienation from the home culture and the workplace. This discordance can be as simple as food preferences or as complex as life goals. Many repats feel that their newfound knowledge and experience are not recognized, are underutilized, or are even devalued by the employer. Research has documented a high rate of departure from the company within the first year after return with estimates ranging from one-third to one-half of repatriates. Repats' second task upon return, after reestablishing or renegotiating important personal relationships, is to rethink their professional identities and their relationships to their organizations.

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Implications for Practice

For potential expats: preparation

- Drill down on the details of the overseas experience by soliciting information from current or former expats that is as close as possible to your expected work and living situation.
- Check on your organization's provision of in-country logistical support for you and your family.
- Outside your organization, you might find support in expatriate relocation companies, such as Globexs, Expatatica, and Power Connections (https://powerconnectionsinc.com).
- Consider the end-game of the expatriate assignment: what will transpire professionally when you repatriate? Discuss your career trajectory with your supervisors and mentors, and with human resources, prior to accepting the assignment. Focus in particular on your position in the company upon return.
- Seek out predeparture training for yourself and, if possible, for family members.

For expats: in-country

- As soon as possible upon arrival, identify one or more "culture brokers" who can translate the culture and customs for you and help you navigate the problems of daily living. Join expatriate online communities, such as InterNations.
- While overseas, immerse yourself in the society to the extent that you feel comfortable. Consider joining expat meetup groups and engaging with the expat community. Remember: These are the best days of your life.
- Take seriously our advice in a previous section: Observe your social environment carefully and avoid making judgments about people's motives and intentions until you are confident in your attributions.
- Never overlook the difficulties of repatriation. Join repat communities.

For companies and managers:

- Starting with the above bullet points and other points made in this paper, consider how you can facilitate your employees' overseas assignments.
- Take a close look at the 10 excellent recommendations for employers in Kraimer, Bolino, and Mead (2016).

Several dimensions have been identified to distinguish cultures, societies, and nation states in the social sciences (e.g., Parsons, Hsu, Kluckhohn, etc.), all of which may be found to affect expatriate outcomes. We highlight group orientedness and power differentials because they have been found to be the best predictors of variables studied in iWOP research. Insights can also be gained from the value dimensions approach to culture (Hofstede, Schwartz, GLOBE, etc.). We avoid using terms that can be identified with a specific research program or scientist.

Remember: These are the best days of your life.

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