

**DISTANCE IN INTERNATIONAL
BUSINESS: CONCEPT, COST
AND VALUE**

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PROGRESS IN INTERNATIONAL BUSINESS RESEARCH
VOLUME 12

DISTANCE IN INTERNATIONAL BUSINESS: CONCEPT, COST AND VALUE

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Emerald Publishing Limited
Howard House, Wagon Lane, Bingley BD16 1WA, UK

First edition 2018

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British Library Cataloguing in Publication Data

A catalogue record for this book is available from the British Library

ISBN: 978-1-78743-719-7 (Print)

ISBN: 978-1-78743-718-0 (Online)

ISBN: 978-1-78743-841-5 (Epub)

ISSN: 1745-8862 (Series)



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PROLOGUE – VOYAGES OF SELF-DISCOVERY: A REFLECTION ON FOUR DECADES OF RESEARCH ON EXPATRIATION AND CROSS-CULTURAL INTERACTIONS

Rosalie L. Tung

ABSTRACT

In this chapter, I reflect on my research on expatriation and cross-cultural interactions over the past four decades. I have characterized it as voyages of self-discovery, as my research questions have been framed by my own experiences in growing up in a bicultural environment in Hong Kong and subsequent relocation to North America. My research findings have helped me understand the what, why, and how of my encounters and observations in the context of international assignments and cross-cultural encounters. The chapter then focuses on my 1981 publication that presented a contingency paradigm of selection and training that generated substantial interest in expatriation. While the contingency paradigm is essentially valid today, I outline four developments that have taken place since then – war for talent, greying of the labor force, rise of emerging markets, and need

for global orientation – that necessitate new perspectives in understanding human resource management in the global context. I then allude to how I would rewrite my 1981 paper differently in light of these changes.

Keywords: Expatriation; international assignments; cross-cultural encounters; biculturalism

One of my earliest and most cited publications, “Selection and training of personnel for overseas assignments” (Tung, 1981), represents a voyage of self-discovery. In fact, much of the research that I have undertaken throughout my career can be characterized as such, hence the use of “voyages” in the plural. This view of my research as voyages of self-discovery explains why I wrote in my 2009 paper that the topics I have pursued throughout my academic career “were guided by my first-hand experience ... (and) new research finding(s) helped ... to unravel a bit more of the puzzle surrounding some of the experiences that I have encountered and/or observed in my life” (Tung, 2009, pp. 10–11). In this chapter, I will provide a brief genesis of my 1981 paper and my ensuing research on expatriate assignments and cross-cultural interactions. Then I will retrospect on how I would write that piece differently today in light of the elapsed time since the publication of my 1981 paper.

In my 2009 paper, I briefly outlined how the environment I grew up in during the formative years of my life had helped shape my research interests for much of my professional career. There is indeed a lot of truth to the saying that “we are a product of our experiences.” While the term, “product,” connotes determinism that I do not subscribe to as it denies the existence of free will, I believe that we are *inspired* by the sum of our past experiences, both positive and negative. Our past experiences, coupled with genetics, make each of us truly distinct. From the research standpoint, by drawing upon one’s own unique background and experiences, it is possible to discern phenomena that have hitherto been unexplored or, at least, have not yet been recognized as meritorious of research attention. In other words, all of us possess a distinct bundle of attributes that is analogous to what researchers on foreign direct investment (FDI; see, e.g., Dunning, 1979; Rugman & Verbeke, 2001) have labeled as country- and firm-specific advantages. Just as a country or a firm capitalizes on its specific advantages in the context of FDI, either outward or inward, as scholars, we too should leverage our own distinctive set of capabilities and competencies in our selection of research topics and methodologies.

In this chapter, I will first briefly illustrate how my research over the years, beginning with my contingency paradigm of selection and training of expatriates for international assignments based on a study of American expatriates abroad (Tung, 1981) that was followed by many publications on different aspects of international assignments, has been profoundly influenced by my past. My focus here is on my 1981 paper since it was instrumental in igniting an explosion of interest in expatriation. Harzing (1995, p. 458) wrote: “Over the last three decades it has become almost ‘traditional’ to open an article on expatriate management by stating that expatriate failure rates are (very) high” even though there are very few studies on this topic, except my 1981 paper. My 1981 paper, which was built upon by others (Harvey, 1985; Mendenhall & Oddou, 1985; to cite a few), has accounted for the exponential growth in research on international assignments that to date has shown no signs of abating. The growing mobility of people across international boundaries (discussed later), whether permanent or temporary, has cemented the significance and importance of international human resource management (IHRM) in our literature.

Even though IHRM is broader than expatriate assignments *per se*, the latter has remained a core topic in that field. This renders my 1981 paper as “the most crucial study in this field” (Harzing, 1995, p. 461). Other researchers, such as Dowling, Festing and Engle (2013), authors of a popular textbook on IHRM, have acknowledged the seminal contribution of my contingency paradigm on selection and training as it represents the first systematic study of the causes of expatriate failure that has informed the broader field of research pertaining to cross-cultural encounters.

Without unduly repeating what I have written in my 2009 paper, I made two personal revelations to show how my upbringing helped shaped my research interests. The first disclosure pertains to spending the formative years of my life in Hong Kong, a city that represents the confluence of East and West, where I grew up bilingual and bicultural. My classmates in a Catholic girls’ school were local Chinese and non-Chinese students. My non-Chinese classmates were either children of expatriates, primarily from the UK and Portugal¹ or merchants from Persia and India. The former are expatriates in the traditional sense as they were sent by their respective home countries to work in Hong Kong for specified periods of time, while the merchants would fall into the category of self-initiated expatriates (SIEs), using the terminology in our current literature, who went to Hong Kong on their own initiative to take advantage of the opportunities there. As such, they typically stayed for indefinite periods of time. A second disclosure in my 2009 paper pertained to the fact that even though both of my

parents are Chinese, my father is “very Western in his upbringing and education” (Tung, 2009, p. 10). My mother, on the other hand, espoused very traditional Chinese values and, at the same time, embraced Catholicism² (see Figs. 1 and 2).

My years in Hong Kong were instrumental in shaping the topics that have fascinated me later as a graduate student and, subsequently, as a researcher in the following four ways: first, because of my exposure from a very early age to studying and playing with people who are different from myself, race- and ethnicity-wise, to me, multiculturalism or multicultural teams (MCT) have always been a matter of course, not an out-of-the-ordinary phenomenon that has to be contended with somehow. Second, given Hong Kong’s status as a British colony until 1997 and my experience with my classmates,



Fig. 1. My Mom, the Guiding Influence in My Life, and I at my Ph.D. Convocation.



Fig. 2. A Picture of Myself.

I was able to observe up close how differences could contribute to both functional and dysfunctional outcomes. In terms of functional outcomes, I saw that lasting friendships and bonds could develop despite the differences. As a child, I learned that differences could be assets. This observation is similar to the findings in our literature that diversity can lead to more creative solutions to problems (Cox & Tung, 1997; Ng & Tung, 1998; Stahl, Maznevski, Voigt, & Jonsen, 2010).

From the dysfunctional perspective, I witnessed that differences could lead to tension, conflicts, and separation, whether spatially (such as the formation of expatriate enclaves) and/or socially (such as the tendency for some expatriates to socialize only with other expatriates). Such tensions and separation typically stemmed from suspicions and/or misinterpretations of the other's intentions and actions.

Third, through exposure to the different sets of values espoused by my more-Western-oriented father and the emphasis that my mother placed on traditional values as well as Catholic principles and beliefs, I saw no contradiction in borrowing from the best of different worlds. In the acculturation model developed by [Berry \(1997\)](#), this would be characterized as “integration” – this mode has been found to be most effective in [Berry’s \(1997\)](#) study of immigrants to Canada and in my study of expatriates who work abroad ([Tung, 1998](#)). In the bicultural identity (BII) literature, [Benet-Martinez and Haritatos \(2005\)](#) show that biculturals who are high on the BII index are not conflicted between opposing value systems whereas those who score low on the index are frequently troubled as to whether they are betraying one of their dual identities where the values systems of the two identity groups collide.

Fourth, differences exist across countries as well as within countries, even though Hong Kong is categorized as an economy and not a country per se. While I learned about cultural dimensions (such as [Hofstede, 1980](#)) and cultural distance ([Kogut & Singh, 1988](#)) later on, I derived two lessons from growing up in Hong Kong: one, intra-national diversity can be as significant as cross-national diversity, the theme of my 1993 paper and my ongoing interest in studying differences within countries ([Tung, 1993](#); [Tung & Baumann, 2009](#); [Tung, Worm, & Fang, 2008](#)). Two, cultural differences can yield both positive and negative outcomes depending upon the situation under consideration. As [Stahl and Tung \(2015\)](#) have revealed through their analysis of 21 years of publications in the *Journal of International Business Studies*, while articles that focus on the downside of cultural distance outnumber those that spotlight the positives associated with such differences by a ratio of 17:1, this imbalance in assumptions is not borne out in the actual findings of these studies. Whether cultural distance can engender positive or negative outcomes is very much contingent upon the situational factors under consideration.

Now that I have provided a brief genesis of my 1981 paper that paved the way for my subsequent research on other aspects of expatriation and cross-cultural interactions; I will turn to how I would rewrite that paper in light of the changes that have taken place in the 30 plus years since its publication.

WHAT STANDS?

Before I delve into the “what’s new,” I believe that the contingency paradigm of selection and training I presented in 1981 continues to be valid. While “contingency” has now been replaced by the current terms of “contextual”

or “situational,” they all carry the same meaning. My contingency paradigm asserts that: (a) where possible, the MNC should hire host country nationals (HCNs); however, (b) where expatriates have to be deployed, there is *no* one set of criteria *nor* one type of training program that is suitable for all categories of assignments to all countries. In other words, it depends upon the contextual or situational factors.

The reasons for advancing a contingency approach are several-fold: One, since the cultural distance between the home and host countries varies, this affects the magnitude of adjustment required. Two, because of the different types of assignments in question, the extent and nature of interactions, including length of stay in a foreign country, vary. As such, the emphasis on relational vis-à-vis task competencies and capabilities in the selection criteria should also vary. Three, because of the aforementioned differences, the nature and content of the training programs would also vary, with the most intensive training programs to be provided to those whose assignments involve intensive interactions with the host society and for extended periods of time.

Today, due to the localization policies of most host countries and the high cost of expatriation, HCNs are used more extensively in the overseas subsidiaries of MNCs. However, expatriation is still used as a strategic tool for the development of a global orientation among those with potentials for advancement to senior management (Caligiuri & Bonache, 2016; Tung, 1998). Furthermore, not all HCNs are the same. Most MNCs continue to define HCNs on the basis of ethnicity. This practice is increasingly being challenged however. In Tung (2016a), I drew attention to inverse resonance, defined as the “attraction of opposites” and the converse of homophily. Inverse resonance has also been referred to as “internalized racism.” Carr, Rugimbana, Walkom, and Bolitho (2001) provided an example of internalized racism in selected African countries. I alluded to the hostility that persists between Hong Kong Chinese and Mainland Chinese (Tung, 2016a; also see Manolova, Eunni, & Gyoshev, 2008; Young, 2014). Furthermore, I have coined the term ex-host country nationals (EHCNs) to refer to those who originate from one country, then went to study, live, and/or work overseas and later return to their country of origin (Tung & Larazova, 2006). EHCNs account for a sizable portion of the brain circulation phenomenon described by Saxenian (2002) in her studies of high-tech entrepreneurs in Silicon Valley. These developments have led me to assert that “the phenomenon of brain circulation has challenged us to fundamentally rethink our definitions of who are expatriates (whether company-sponsored or self-initiated) and who are locals” (Tung, 2016a, p. 149).

With regard to the use of varying selection criteria and training programs for different categories of assignments to different countries, while the general premise still holds, the multiple categories of assignees described above have to be factored into these decisions. In addition, my contingency framework was intended for use on company-sponsored assignments. Back then, SIE was rare. The growing incidence of SIE may be attributed, in part at least, to the rising cost of expatriation, need for global orientation, and career opportunities in emerging markets discussed later in this chapter.

In terms of the findings of my 1981 study, the failure rates of American expatriates abroad have improved significantly as reported in [Tung \(1998\)](#). I attributed the decline in failure rates to the growing global orientation among Americans who are on assignment as well as the emergence of “boundary-less” careers where assignees value an international assignment because it can broaden their worldview even though their home organization may not necessarily reward them for their service abroad ([Cerdin & Brewster, 2014](#); [Tung, 1998](#)). Unfortunately, my findings with regard to, one, “family considerations” as an important cause for early return ([Lazarova, Westman, & Shaffer, 2010](#); [Shaffer & Harrison, 2001](#)); and, two, expatriates’ concerns about their company’s inattention to repatriation ([Baruch, Altman, & Tung, 2016](#); [Tharenou & Caulfield, 2010](#)) remain.

WHAT’S NEW?

A lot of changes have occurred since 1981. In my 2016 paper ([Tung, 2016a](#)) to commemorate the 50th anniversary of the *Journal of World's Business*, I outlined four major developments that necessitate our adoption of new perspectives in studying IHRM. A summary of these four major developments is presented below with implications for research:

1. Talent Poaching

The term, war for talent, was coined by [McKinsey’s Chambers, Foulon, Handfield-Jones, Hankin, and Michaels \(1998\)](#) to refer to the reality that because of the shortage of highly skilled labor among countries that pursue high economic growth, organizations (both private and public) are increasingly willing to forego the traditional practice of recruiting from within one’s home country and instead opt to actively hire highly qualified people wherever they can be found. An outstanding example in this regard is the case

of Mark Carney, a Canadian and the 2008–2013 Governor of the Bank of Canada. He resigned his Canadian post to become the Governor of the Bank of England. The growing mobility of people across international boundaries coupled with the greying of the workforce in many countries, discussed below, imply that our traditional way of measuring “nationality” by passport an individual holds or country of incorporation of a company is increasingly suspect.

The media recently reported on the case of an American-born businessman who holds passports from eight countries, from Belize to Britain (Young, 2017). In early February 2017, it was disclosed that Peter Thiel, co-founder of PayPal and a tech billionaire, had acquired New Zealand citizenship despite failing to meet standard residency requirements for that country (Brockett, 2017). It appears that the acquisition of citizenship from multiple countries has become common among the super rich with investments and residences that span the globe. Barclays Bank (Barclays, 2014) has dubbed the super rich as “global citizens” who pursue educational, career, and investment opportunities wherever they arise (for a more detailed discussion, see Tung, 2016a).

2. Greying of the Labor Force

A second development is the overall aging of the labor force in many industrialized countries as well as some emerging markets, most noticeably China (see Chand & Tung, 2014). Aside from encouraging an upturn in birth rates in countries with an aging population, the attraction of skilled immigrants to fill the void could help redress the situation. This contributes to intra-national diversity. According to the 2016 Canadian Census, over one-half of the population (51%) in Toronto were born outside of Canada with lingual diversity to match (140 languages and dialects). Similarly, the US census data suggest that Whites will become the minority (49.7%) in that country by 2044 (Frey, 2014). Intra-national diversity, FDI (both outward and inward), and the formation of cross-national strategic alliances have given rise to the pervasive presence of MCTs, whether work or nonwork related. Depending upon the situation, MCTs can yield challenges as well as opportunities for organizations that have to contend with them (see Stahl et al., 2010).

Aside from the issues of inverse resonance and internalized racism discussed earlier, Harrison and Klein (2007) suggest that there are different types of diversity, namely, separation (spatial or cultural distance), variety (gender, race, ethnicity, and religious traditions), and disparity (stage of economic and technological development). The bulk of International Business

(IB) research has focused primarily on one type of diversity, namely cultural distance. Variety on the basis of gender has received more attention while other bases for variety, such as race, ethnicity, and religious traditions have been less explored, with some exceptions. [Tung \(2008\)](#) and [Tung and Haq \(2012\)](#) have examined the interaction effects of race and gender in influencing the decision-maker's perception of a candidate's suitability for international assignments. The literature on disparity, such as status differential, is just emerging (see e.g., [Kim & Tung, 2013](#); [Sharkey, 2014](#); [Yildiz & Fey, 2016](#)). [Leung and Morris' \(2015, p. 1045\)](#) have alluded to this by highlighting the tendency among employees in industrialized countries to view their Chinese bosses as "low in expert power" since China is often perceived as less developed, both economically and technologically – China is still officially labeled as an emerging market and is considered to be less technologically advanced than the United States.

3. Rise of Emerging Markets

The third development is the rise of emerging markets – most notably China and India – and their growing role in the global economy. In this context, we witness the rise of emerging market multinationals (EMMNCs). At the time of my 1981 article, China was just recovering from the ruins of the decade-long Cultural Revolution (1966–1976) that brought its economy to the verge of collapse. China's transformation since then has been nothing short of miraculous and it is now the third largest foreign investor in the world.

Most of the literature on international assignments has focused on expatriates from industrialized countries, such as the United States and Western Europe. Research on Outward Foreign Direct Investment (OFDI) from EMMNCs has received attention only recently. The status differential hypothesis discussed in the preceding section suggests that the dynamics and patterns of interaction between expatriates from EMMNCs and HCNs could be very different from the experiences of MNCs from industrialized countries. These merit research attention.

4. Need for Global Orientation

A fourth development is the consensus among corporate leaders of the need for global orientation. While global orientation can be developed through a variety of ways (see, e.g., [Bird & Mendenhall, 2016](#)), a proven and effective method

is expatriation, whether company-sponsored or self-initiated (Tung, 2014). The issues of passport as a surrogate for nationality, biculturalism, and boundary-less careers have been discussed earlier – all of these have important implications on what development of a global orientation entails and how we need to rethink selection criteria and redesign training programs for cross-cultural encounters.

CONCLUDING REMARKS

At the time when I wrote my 1981 paper, while I had hoped for more open borders, I could not have anticipated the extent of globalization that has taken place in the course of less than 40 years. The speed and magnitude of globalization has been accelerated, in part at least, by the internet revolution that has enabled small entrepreneurs from remote corners of the world to sell their products worldwide, the emergence of virtual MCTs, and instantaneous access to information and faster sharing of knowledge across the world.

While recent developments on both sides of the Atlantic, Brexit and Trump's presidency, appear to be major setbacks to globalization, as Tselichtchev (2017) argues, "globalization's not dead, it just has a new powerhouse," China. Thus far, 50 countries have signed onto the China-led "One Belt, One Road" initiative. After the widely reported "combative" phone call between Australian Prime Minister Turnbull and President Trump, Australia, one of the United States' staunchest allies, has engaged in soul-searching on the merits and pitfalls of strengthening its ties with China. Australia's first ambassador to China has asserted that "the world had reached the end of an era defined by European and American leadership" and urged Australia "to make China its primary focus of diplomacy and economic policy" (Cave, 2017).

Even before Brexit and Trump's election, Rolland (2015, p. 4) has alerted us to how China's "One Belt, One Road" initiative can alter the "global landscape" by re-orienting trade and geopolitical focus to the large Eurasian landmass that spans across Asia, Russia, Central Asia, Middle and Near East to Europe, also known as the "New Silk Road." "If Europe shifts attention eastward to Asia instead of retaining its westward focus across the Atlantic, then U.S. policymakers may be compelled to radically alter their traditional approaches to these regions and indeed the entire world" (see also Tung, 2016b). In end of 2016, the Asia Infrastructure Investment Bank (AIIB), the vehicle for financing the "One Belt, One Road" initiative, has already approved and disbursed its first loans for infrastructure projects in four countries. Even if the "One Belt, One Road" initiative does

not succeed in resurrecting the “New Silk Road,” it still represents a major departure from the current geopolitical situation that is centered around the United States.

In short, it appears that globalization will continue to march on, albeit to the beat of a different or multiple drummers. Furthermore, it is normal to encounter speed bumps that require realignment along the way. Assuming that this is so, expatriation, cross-cultural encounters, and IHRM will become even more important and significant in the future. In particular, there is a need to recast expatriation in the context of boundary-less careers, EHCNs, and the war for talent, including the definition of who are expatriates and who are locals (see Tung, 2016a). Furthermore, expatriation from emerging multinationals will continue to gather momentum, thus necessitating us to examine the dynamics of interaction between EMMNCs’ expatriates with employees in industrialized countries. In short, research opportunities on international assignments and cross-cultural encounters will abound as the four new developments briefly discussed in this chapter continue to unfold before us.

NOTES

1. Hong Kong’s neighboring city of Macau was a colony of Portugal until its return to China in 1999.
2. Even though religions are supposedly universal, some people in the East have considered Christianity as a “western” religion.

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