

# Chapter 2

## Expatriate Adjustment and Expatriate Learning

### 2.1 International Assignments

#### 2.1.1 *Definition and Classification of International Assignments*

International work experience is one of the major requirements for promotion to higher-level managerial positions. International assignments are a powerful mechanism through which managers acquire new business skill sets, international perspectives, and basic cross-cultural assumptions (Furuya et al. 2009). The topic of international assignments (IAs) has an established pedigree in the international management literature and has in particular dominated the research agenda of international human resource management (IHRM) for over three decades (Collings et al. 2007; Stahl and Bjorkman 2006). It has been argued that entrepreneurs have recognised the importance of physically relocating managers to foreign locations where business operations are based since approximately 1900 B.C. (Collings et al. 2007). Owners of international organisations realised the benefits of utilising people known to them and socialised into the organisation in minimising the agency problems associated with managing spatially diverse organisations from an early stage. This is because these individuals had built a level of trust with their superiors and thus were considered to be more likely to act in the best interests of the organisation, relative to local managers from the host country who were largely an unknown quantity. Thus, international assignments were used as a means of addressing agency issues as a result of the separation of ownership and management and their amplification through distance.

The most widely recognized and long-standing typology of international assignments is that of Edstrom and Galbraith (1977). Edstrom and Galbraith (1977) proposed a distinctive three-fold subdivision of international assignments based on assignment purposes: fill positions, develop organization, and develop managers.

Firstly, fill positions refers to when suitably qualified host country nationals were not available. Secondly, as a means of organisational development, aim at increasing knowledge transfer within the MNC and modifying and sustaining organizational structure and decision processes. Thirdly, as a means of management development, aim at developing the competence of the individual manager. Although it is important to note that assignments generally have more than one rationale (Sparrow et al. 2004), Edstrom and Galbraith's (1977) typology provides a useful point of departure for the consideration of why MNCs use international assignments and expatriates. Hocking et al. (2004) argue that Edstrom and Galbraith (1977)' classification of international assignments lack a strong conceptual framework to explain the underlying strategic significance of the categories and their relationships. They reclassify the principal strategic purpose of international assignments and present the underlying relationships. According to Hocking et al. (2004, 2007), international assignments' principal purposes comprise three categories: business applications, organization applications, and expatriate learning. In particular, expatriate learning refers to either business- or organization-related knowledge acquisition by the expatriate, which equivalent to the two knowledge application categories: business applications and organization applications.

Alongside the conventional international assignment (usually more than one year and involving the relocation of the expatriate), there is the emergence of a portfolio of alternatives to the traditional international assignment, referred to as a non-standard international assignment including: short-term assignments (SIAs); commuter assignments; international business travel; and virtual assignments (Brookfield Global Relocation Trends 2005; Collings et al. 2007). Research suggests there is little evidence of a significant decline in the use of long-term (traditional) international assignments but does identify the growing use of alternative forms of international assignments (Collings et al. 2007). A recent survey by Brookfield Global Relocation Trends (2005) reported that 62 % of respondents suggested that their organizations were seeking alternatives to long-term assignments. This suggests that what is happening is the emergence of a portfolio of international assignments within the MNC (Roberts et al. 1998).

The most popular form of non-standard assignments appears to be the short-term international assignment (SIA). Compared to traditional assignments, SIA has three key advantages: flexibility; simplicity; and cost effectiveness. Long-term IAs had uncertain benefits and potential drawbacks. Many expatriates felt that they had to work harder to preserve the home network and their social capital suffered through the traditional IAs. Short-term international assignment seems to be a better choice (Tharenou and Harvey 2008). Managers can be assigned to some challenging tasks in a foreign country. They are not away from the headquarters for a long period of time and can be assigned to several different countries before they are appointed to some important managerial position. Such an approach optimizes the economic efficiency of human resources—providing required skills and developing international capabilities simultaneously (Tharenou and Harvey 2008). However, Yamazaki and Kayes (2007) claim that if MNCs expect their expatriates to perform successfully within their assignment periods, they may need to provide the

expatriates with at least a three-year tenure. Therefore, this study adopts a pseudo longitudinal research method that examines expatriates with different lengths of assignment tenure to investigate whether short-term international assignments are as effective for expatriate adjustment and learning as traditional long-term international assignments.

### 2.1.2 *Expatriates and International Assignments*

An expatriate is the person that MNCs assign to an international assignment. Expatriates usually are home country nationals or third country nationals. Edstrom and Galbraith (1977) define expatriates as individuals who, irrespective of their national origin, are transferred outside their native country to another country specifically for employment purposes. Expatriates are usually classified into three broad categories based on their national origin relative to that of the parent company (Shaffer et al. 1999). *Parent country nationals* (PCNs) are expatriates who are from the home country of the MNC; *third country nationals* are non-PCN immigrants in the host country (e.g., those transferred between foreign subsidiaries); *inpatriates* are employees from foreign subsidiaries who are assigned to work in the parent country. There are several reasons why MNCs select various types of expatriates. For example, parent country nationals facilitate communication between corporate and foreign offices, while third country nationals tend to be more sensitive to cultural and political issues.

Harzing (2001) identified three specific control roles of expatriates, namely: the bear, the bumble-bee, and the spider. Bears act as a means of replacing the centralisation of decision-making in MNC and provide a direct means of surveillance over subsidiary operations. The title highlights the degree of dominance these assignees have over subsidiary operations. Bumble bees fly ‘from plant to plant’ and create cross-pollination between the various ‘offshoots’ (Harzing 2001:369). These expatriates can be used to control subsidiaries through socialisation of host employees and the development of informal communication networks. Finally spiders, as the name suggests control through the weaving of informal communication networks within the MNC. Significantly, Harzing (2001) argues that although expatriates generally appear to perform their role as bears regardless of the situation, the study suggests that their roles as spiders and bumble bees tend to be more contexts specific. Specifically, the bumble bee and spider roles appeared to be more significant in longer established subsidiaries (longer than 50 years) while the bumble bee role appeared to be important in newly established subsidiaries also. Besides, the level of localization of subsidiary operations and further lower levels of international integration (the subsidiary was not greatly reliant on the headquarters for sales and purchases) were positively related to the likelihood of expatriates performing the bumble bee and spider roles.

### ***2.1.3 Cultural Differences Between Nations***

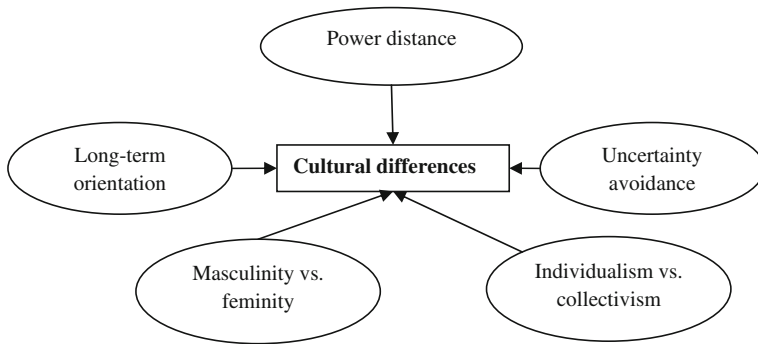
#### **2.1.3.1 High-Context Versus Low-Context Cultures**

Hall (1977) claims a cultural classification of high-context culture and low-context culture based on how, in each individual, identity rests on total communication frameworks. In high-context cultures, surrounding situations, external physical environments, and non-verbal behaviours are all important for its members to determine the meanings of messages conveyed in communication. Covert clues in these contexts make differences to the members and are used to search for a real meaning beyond verbal messages. In a high-context culture, its members tend to be related to each other in relatively long lasting relationships. For their effective communications, high-context culture requires its members to become sensitive to immediate environments through feelings. Yamazaki (2005) contends that the communication patterns in high-context cultures are conceptually associated with the Concrete Experience learning mode. Chinese, French, Japanese, and Arabic countries are classified as high-context cultures (Hall 1977).

In a low-context culture, on the other hand, surrounding situations, external physical environments, and non-verbal behaviours are relatively less important in generating and interpreting meanings, whereas explicit verbal messages are crucial in communication (Hall 1977). Most information is conveyed in explicit codes and therefore, explicit communicative styles in logical forms are placed with high importance. In low-context culture, interpersonal relationships last for a relatively shorter period. The communication patterns of low-context cultures focus less on interpersonal relationships while more on rationally detached analyses. Yamazaki (2005) contends that the communicative traits of low-context culture are consonant with the characteristics of the Abstract Conceptualization learning mode and thereby, individuals in low-context culture are likely to learn by logical thinking and analytical cognition. The United States, the United Kingdom, Canada, Australia, Germany, and Switzerland are classified as low-context cultures (Hall 1977). In the present research, the sample of western expatriates constitutes: 35.5 % of the sample comes from the United Kingdom, 29.8 % from the United States, 21.5 % from Canada, 9.1 % from Australia, and 4.1 % from other countries. Basically, western expatriate managers participated in this research are assigned from countries with low-context cultures to a country with high-context culture, China.

#### **2.1.3.2 Collectivism Versus Individualism Cultures**

Hofstede (1997) proposes five dimensions of cultural differences: individualism versus collectivism, masculinity versus femininity, long-term orientation versus short-term orientation, power distance, and uncertainty avoidance (see Fig. 2.1). This section begins with a discussion of the dimension collectivism versus individualism.



**Fig. 2.1** Hofstede's 5 cultural dimension model

Hofstede (1997) defines the collectivism and individualism cultural dimension as 'the degree to which a society reinforces individual or collective achievement and interpersonal relationships'. The fundamental issue addressed by this dimension is the degree of interdependence a society maintains among its members. It has to do with whether people's self-image is defined in terms of 'I' or 'we'. A high score on individualism indicates that individuality and individual rights are paramount within the society. In individualistic cultures, individuals tend to form a large number of looser relationships and they are supposed to look after themselves and their direct family only (Hofstede 2010). On the other hand, a low score on individualism, or a high score on collectivism, indicates that the society has a more collectivist nature with close ties between individuals. In collectivist cultures, the society reinforces extended families and collectives and everyone takes responsibility for fellow members of their group. Markus and Kitayama (1991) examined the culturally different self-construal and proposed two classifications: interdependent-self and independent-self, each of whose attributes differs among cultures. Interdependent-self is represented as the self-construal of people in Asian, African, Latin American, and many southern European cultures, while independent-self is exemplified as the self-construal of those in American culture as well as many western European cultures (Markus and Kitayama 1991). Triandis (1995) and Hofstede (1997) categorized this cultural dimension of interdependent-self versus independent-self as analogous to that of collectivism versus Individualism. Anderson (1988) supports this cultural dimension from a cognitive perspective. He illustrates that Eastern cultures are holistic, relational, and field-dependent, while Western cultures are analytical and field-independent.

People with collectivism cultures have the strong sense of belongingness to social contexts and relationships (Hofstede 1997). Markus and Kitayama (1991) claim that individuals with interdependent-self tend to base the relationship with others as a crucial and functional unit of conscious reflection and, they have a strong tendency to seek information about others' perception about self in the relationship. In contrast, independent-self, the American and western European

notion of self, is seen as separate from context (Markus and Kitayama 1991). There is a widespread belief that people are inherently detached and distinct in individualistic cultures where the cultural norm is to become independent from others and to express one's uniqueness. Collectivistic cultures, such as the cultures of most Asian countries, emphasize a communication style in which 'most of the information is either in the physical context or internalized in the person' (Hall 1976: 79), whereas individualistic cultures, such as those of the United States, Germany, and the United Kingdom, use a 'low-context' communication style (Hall 1976). Chinese and Japanese are classified with high collectivist culture, while the North American and most western European countries are classified with individualistic cultures (Hofstede 2010). According to the national culture comparisons of Hofstede (2010), China is a highly collectivist culture where people act in the interest of the group and not necessarily of themselves. In-group considerations affect hiring and promotions with closer in-groups (such as family) are getting preferential treatment. Whereas relationships with colleagues are cooperative for in-groups, they are cold or even hostile to out-groups. In China, personal relationships prevail over task and organization (Hofstede 2010).

In the present research, western expatriate managers are assigned from countries with individualistic cultures to a country with a high collectivist culture, China. As we can see, the collectivists' cultural characteristics of China may present a major obstacle for western expatriates. The researcher suggests that an awareness of the history, culture, and behaviour of Chinese people would reduce expatriates level of frustration, anxiety, and concern.

### 2.1.3.3 Power Distance

Hofstede (1997) defines power distance as 'the degree of equality, or inequality, between people in the country's society'. Power distance refers to 'the extent to which the less powerful members of institutions and organisations within a country expect and accept that power is distributed unequally' (Hofstede 1997). High scores on a Power distance index indicate that inequalities of power and wealth have been allowed to grow within the society. These societies are more likely to follow a caste system that does not allow significant upward mobility of its citizens. Low scores on a Power distance index, on the other hand, indicate that the society deemphasizes the differences between citizen's power and wealth. In these societies, equality and opportunity for everyone is stressed.

According to the national culture comparisons in Hofstede centre (Hofstede 2010), China sits in the higher rankings of his Power Distance Index, i.e. a society that believes that inequalities amongst people are acceptable. The subordinate-superior relationship tends to be polarized and there is no defense against power abuse by superiors. Individuals are influenced by formal authority and sanctions and are in general optimistic about people's capacity for leadership and initiative. People should not have aspirations beyond their rank. On the other hand, the United State, the United Kingdom, and most western European countries

are classified with low power distance cultures (Hofstede 2010). Within organizations in low power distance societies, hierarchy is established for convenience, superiors are always accessible and managers rely on individual employees and teams for their expertise. Both managers and employees expect to be consulted and information is shared frequently. At the same time, the communication is informal, direct, and participative. In the present research, western expatriate managers are assigned from countries with lower power distance cultures to a country with a high power distance culture, China.

#### **2.1.3.4 Strong Uncertainty Avoidance Versus Weak Uncertainty Avoidance Cultures**

Hofstede (1997) defines uncertainty avoidance as ‘the extent to which the members of a culture feel threatened by uncertain or unknown situations’. Furthermore, uncertainty avoidance index refers to the level of tolerance for uncertainty and ambiguity. High scores on uncertainty avoidance index indicates that the country has a low tolerance for uncertainty and ambiguity and is a rule-oriented society that institutes laws, rules, regulations, and controls in order to reduce the amount of uncertainty. On the other hand, a low score on the uncertainty avoidance index indicates that the country has less concern about ambiguity and uncertainty and has more tolerance for a variety of opinions. A society with weak uncertainty avoidance culture is less rule-oriented and more readily accepts change. The characteristics of strong uncertainty avoidance are reflected in Chinese culture (Hoppe 1990). The main concern of the society is to control everything in order to eliminate or avoid the unexpected. As a result, the society does not readily accept change and is risk adverse.

Organizational members in strong uncertainty avoidance countries have a feeling of anxiety or fear when encountering unfamiliar risks, deviant ideas, or conflicts in their work place. Those members need to take time for action until they acquire enough knowledge and information to reduce or resolve unclear and unstructured situations. In contrast, organizational members in weak uncertainty avoidance countries tend to feel less uncomfortable in unclear and unstructured circumstances and are more likely to take risks in unfamiliar situations when encountering deviant or innovative ideas and behaviours (Hofstede 1997). Self-actualization in a weak uncertainty-avoidance work place functions as a great motivational factor, while no failure is the main concern in a strong uncertainty-avoidance work place. Hoppe (1990) tested the relationship between the strong/weak uncertainty avoidance cultural dimension and Kolb’s (1986) learning styles. He examined a sample of 1544 adults from 19 countries: 17 European countries (Great Britain, Germany, France, Italy, and so on), the US, and Turkey. His results showed that people from strong uncertainty avoidance cultures tend to learn through the reflective observation learning mode, while those from weak uncertainty-avoidance cultures tend to learn through the active experimentation learning mode.

Japanese, South Korea, and Germany are classified with strong uncertainty avoidance cultures; Chinese is classified with medium to strong uncertainty avoidance culture; the United States, the United Kingdom, Australia, and Denmark are classified with weak uncertainty avoidance cultures (Hofstede 2010). In the present research, western expatriate managers are assigned from countries with weak uncertainty avoidance cultures to a country with a medium to strong uncertainty avoidance culture, China.

### **2.1.3.5 Long-Term Orientation**

Hofstede (1997) defines Long-term orientation as ‘the degree to which a society embraces, or does not embrace, long-term devotion to traditional, forward thinking values’. High scores on a Long-term orientation index indicate that the country prescribes to the values of long-term commitments and respect for tradition. This is thought to support a strong work ethic where long-term rewards are expected as a result of today’s hard work. In a society with a long-term orientation, businesses may take longer to develop, particularly for an ‘outsider’. Low scores on a Long-term orientation index, on the other hand, indicate that the country does not reinforce the concept of long-term, traditional orientation. In a society with this culture, change can occur more rapidly as long-term traditions and commitments do not become impediments to change.

According to the national culture comparisons in Hofstede centre (Hofstede 2010), China is a highly long-term oriented society in which persistence and perseverance are normal. Resources and investment tend to be in long-term projects, such as real estate. The United States, on the other hand, is classified as a short-term culture. American businesses tend to measure their performance on a short-term basis, with profit and loss statements being issued on a quarterly basis. This also drives its people to strive for quick results within the work place. In the present research, western expatriate managers are assigned from countries with relatively short-term orientation cultures to a country with a highly long-term oriented culture, China.

### **2.1.3.6 Masculinity Versus Femininity**

Hofstede (1997) defines the Masculinity/Femininity cultural dimension as ‘the degree to which a society reinforces, or does not reinforce, the traditional masculine work role model of male achievement, control, and power’. High scores on the Masculinity index indicate that the country experiences a high degree of gender differentiation. Males dominate a significant portion of the society and power structure, with females being controlled by male domination. On the other hand, low scores on the Masculinity index indicate that the country has a low level of differentiation and discrimination between genders. Females are treated equally to males in all aspects of the society. In the present research, western expatriate



managers are assigned to a country with a slight Masculinity oriented culture, China.

In summary, Chinese culture is highly contrasted with western (American and Western Europe) cultures. China is distinct different from most other countries. From a western perspective, China 'is seen as the most foreign of all foreign places. Its culture, institutions, and people appear completely baffling—a matter of absolute difference' (Chen 2001: 17). Also, companies in different cultures have different ways of conducting business. There is a wealth of evidence that cultural differences can act as important barriers for business expatriates. According to Torbiorn (1988), the more dissimilar, foreign, or strange a situation appears, the more negative the expatriates' attitudes towards those situations. Psychological cultural barriers are typically associated with negative reactions towards another culture, norms of the other culture appear as less familiar, less normal, less good, and so forth than those to which the individual is acculturated (Selmer 2004). A psychological cultural barrier is said to be more obvious when two cultures are different in terms of language and other cultural norms (Selmer 2004).

## 2.2 Expatriate Adjustment

International assignments involve significant changes in the job the individual performs and the corporate culture in which responsibilities are executed. It also involves dealing with unfamiliar norms related to the general culture, living conditions, weather, food, health care, daily customs, and political systems. It is estimated that 20–40 % of all expatriates sent on foreign assignments return home prematurely. McGinley (2008) suggests that expatriate failure rates vary from country to country. National Foreign Trade Council (2006) demonstrates that the rate of early return from expatriate assignment was approximately 21 %. However, failure rates are said to increase further when repatriation failure (expatriates who return from overseas assignments but then leave their firms within one year) rates are considered (McGinley 2008). Expatriate failure is a significant issue for MNCs due to the high costs of expatriate failure which are both direct (e.g. salary, training costs, travel and relocation expenses) and indirect (damaged relations with host country organizations and loss of market share). Research suggests that the latter should be considered as the most significant costs by MNCs, as damage to reputation in key strategic foreign markets could be highly detrimental to the prospects of successfully developing international business in particular regions. Expatriate failure also bears considerable costs for managers themselves, including loss of self-esteem, self-confidence, and reputation. In summary, the literature indicates that the failure rate of expatriates has been reported to range from 10 to 80 %, costing MNCs from \$40,000 to \$1million for each failed assignment. The inability of expatriates to successfully adjust to foreign environments has been cited as one of the most frequent reasons for unsuccessful international assignments (Black et al. 1991; Shaffer et al. 1999; Takeuchi et al. 2005; Okpara and Kabongo 2010).

Liu and Lee (2008) contend that management researchers have largely failed to study systematically the psychological, social and behavioural concerns of managing overseas operations. In order to advance the research on expatriate failure and increase our understanding on expatriate adjustment, additional research is needed, particularly from a non-western context like China, because the majority of the researches conducted on these issues have been done in the west (Black et al. 1991; Grainger and Nankervis 2001; Selmer 2004).

Expatriate adjustment is generally described as a process where a manager leaves a familiar cultural environment and enters an unfamiliar one. It is the perceived degree of psychological comfort and familiarity an expatriate has working with the new culture (Black et al. 1991). Scholars have only focused their research efforts on the problem of expatriate adjustment and effectiveness since the late 1970s (Black et al. 1991). Previous to that time, some research had been conducted on Peace Corps volunteers and foreign exchange students, but little work was done on expatriate managers (Church 1982, cited in Black et al. 1991). Selmer (2004) contends that psychological adjustment is a main component of expatriate adjustment. Psychological adjustment connotes subjective well-being or mood states (e.g. depression, anxiety, tension, and fatigue), emphasizing attitudinal factors of the process of adjustment. The theoretical concept of subjective well-being is associated with the psychological aspects of international adjustment (Selmer 2004).

The concept of socio-cultural adjustment has been proposed and defined in the literature on international adjustment (Searle and Ward 1990; Ward and Searle 1991). Research on international assignments highlights psychological or socio-cultural adjustment as the vital construct underlying the rewards and costs of expatriate experiences to individuals, their families, and their firms (Bhaskar-Shrinivas et al. 2005). Socio-cultural adjustment relates to the ability to 'fit in' or effectively interact with members of the host culture (Ward and Kennedy 1992). Socio-cultural adjustment has been associated with variables that promote and facilitate culture learning and acquisition of social skills in the host culture (Selmer 2006). The socio-cultural notion of adjustment is based on cultural learning theory and highlights social behaviours and practical social skills underlying attitudinal factors (Black and Mendenhall 1991). Selmer (2006) claims that Black et al.'s (1991) theoretical framework of international adjustment covers socio-cultural aspects of international adjustment. A significant amount of existent empirical research supports a positive correlation between expatriates' international adjustment and their work performance (Caligiuri 1997; Selmer 2006).

### ***2.2.1 Expatriate Adjustment Dimensions and Process***

Black (1988) contends that expatriate adjustment to the cross-cultural environment can be viewed as having three primary dimensions: *degree*, *mode*, and *facet*. *Degree* of adjustment can be viewed as both a subjective and objective concept. Subjectively, it is the degree of comfort the expatriate feels in the new role and the

degree to which he/she feels adjusted to the role requirements. Objectively, on the other hand, it is the degree to which the expatriate has mastered the role requirements and is able to demonstrate that adjustment via his/her performance (Black 1988). *Mode* of adjustment refers to the manner in which the expatriate adjust to the new role, i.e. expatriates can adjust by altering the new role to match better themselves or by altering their own attitudes and behaviours to match better the role expectations or altering both to compromise. Black (1988) proposes that there are at least two *facets* of expatriate adjustment: work adjustment and general adjustment. Black and Stephens (1989) further extended this framework and suggest that there are three specific facets of expatriate adjustment: adjustment to work, which encompasses supervision, responsibilities, and performances; adjustment to interacting with host nationals; adjustment to the general environment, which encompasses life conditions in the foreign country. Several researchers have confirmed this typology (Black and Gregersen 1991; Shaffer et al. 1999; Okpara and Kabongo 2010).

Expatriate adjustment is the process of adaptation to living and working in a foreign culture. Torbion (1988) proposed that cross-cultural adjustment occurred in four phases which is often referred to the U-curve. It depicts a progression of adjustment through four sequential stages: honeymoon, culture shock, adjustment, and mastery. The trajectory of adjustment over time resembles a U-curve: initially rising during the honeymoon, falling when culture shock occurs, recovering as adjustment take place, and stabilizing during mastery.

Black and Mendenhall (1991) explained the U-curve in terms of social learning theory. The first phase occurs during the first few weeks after arrival. At this time, the new arrival is fascinated with the new and different aspects of the foreign culture and country (Torbion 1988). During the initial stage, the person has not had sufficient time and experience in the new country to discover that many of his/her past habits and behaviours are inappropriate in the new culture. This lack of negative feedback and the newness of the foreign culture combine to produce the 'honeymoon' effect. Once the newcomer begins to cope seriously with the real conditions of everyday life, the second phase of cross-cultural adjustment begins. This stage is characterized by frustrations and hostility toward the host country and its people (Torbion 1988). This is because the person discovers that his/her past behaviours are inappropriate in the new culture but as yet has not learned what to substitute. Torbion (1988) argues that culture shock generally occurs at the transition between phase two and phase three when the person has received the maximum amount of negative feedback but as yet has very little idea about what the appropriate behaviours are. The third stage begins as the person acquires some language skills and adaptive ability to move around on his/her own. In the third phase, the person begins to learn not only how to get around but also some new appropriate behaviours. By the third phase, the person also has developed some proficiency in performing the new set of behaviours (Black 1988). In the fourth phase, the person's adjustment is generally complete and the incremental degree of adjustment is minimal. In this stage, the person now knows and can properly perform the necessary behaviours to function effectively and without anxiety to cultural differences

(Black 1988). Bhaskar-Shrinivas et al.’s (2005) Meta-analyses, using data from 8474 expatriates in 66 studies, provided support for the U-curve, or sideways S-shape, to expatriate adjustment’s trajectory.

Integrating the international and domestic adjustment literatures, Black et al. (1991) propose two major components (including seven dimensions) of the expatriate adjustment process. Figure 2.2 presents Black et al.’s (1991) International adjustment model. The first component, anticipatory adjustment, describes issues that exist before expatriates leave their home countries; the second component, in-country adjustment, deals with issues that become relevant after the expatriates arrive at their foreign assignments. Anticipatory adjustment includes three dimensions: pre-departure training, previous overseas experience, and organizational selection mechanisms. In-country adjustment, on the other hand, includes four dimensions: individual skills, job-related factors, organizational factors, and non-work factors. Shaffer and Harrison (2001) propose that an expatriate’s language skills should also be considered in anticipatory adjustment. Black (1988) explains that in both domestic and international adjustment literatures, an individual leaves a familiar setting and enters an unfamiliar one. However, because international adjustment usually entails greater disruptions of old routines than domestic adjustment, the magnitude of uncertainty is usually higher in international versus domestic adjustment. In general, the domestic adjustment literature has focused on pre- and post-entry adjustment variables, especially those related to the job and the organization, whereas the international adjustment literature has focused on individual and

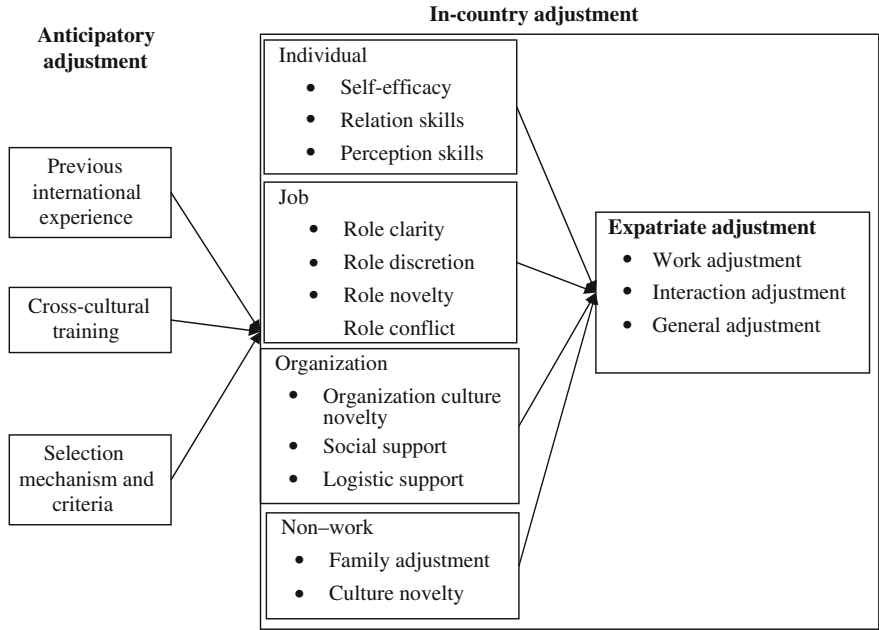


Fig. 2.2 Black et al.’s (1991) International adjustment model

non-job variables and on degree of adjustment (Black et al. 1991). Black et al. (1991) further suggest that general adjustment and interaction adjustment may be much stronger predictors of organizational commitment, intent to leave, or turnover in the case of international adjustment versus domestic adjustment. Hechanova et al. (2003) argue that the adjustment model proposed by Black et al.'s (1991) has instigated and galvanized a large body of evidence. While Tan et al. (2005) argue that Black et al.'s (1991) cross-cultural adjustment model is mainly descriptive and needs to be more prescriptive, Bhaskar-Shrinivas et al. (2005) produced evidence that strongly supported the model, through meta-analyses using data from 8474 expatriates in 66 studies. They contend that Black et al.'s (1991) model is the most influential and often-cited theoretical treatment of expatriate experiences.

### ***2.2.2 Factors Influencing Expatriate Adjustment***

The present research will discuss the factors that influence expatriate adjustment from four aspects: individual factors, job-related factors, organizational factors, and non-work factors based on Black et al.'s (1991) International adjustment model (see Fig. 2.2). It should also be noted that different adjustment influencing factors may have different impacts on each facet of expatriate adjustment (general adjustment, work adjustment, and interaction adjustment).

#### **2.2.2.1 Individual Factors**

The present research will discuss the individual factors that influence expatriate adjustment from two aspects: individual characteristics (including self-efficacy and interpersonal skills) and previous international experience.

##### **1. Individual characteristics**

Black (1988) reviewed the individual factors that were hypothesized to facilitate expatriate adjustment and reported a summary of these which includes: (1) the individual's desire to adjust; (2) technical or managerial competence (Hays 1971, cited in Black 1988); (3) a person's social relation skills orientation (Ratiu 1983); (4) an individual's tolerance for ambiguity or open mindedness (Ratiu 1983); (5) an individual's self-confidence. Mendenhall and Oddou (1985) reviewed the individual skills necessary for a manager to be effective in a cross-cultural setting. They categorized all these skills into three dimensions: the self-dimension, which encompasses skills that enable the expatriate to maintain mental health, psychological well-being, self-efficacy, and effective stress management; the relationship dimension, which constitutes the array of skills necessary for the fostering of relationships with host nationals; and the perception dimension, which entails the cognitive abilities that allow the expatriate to correctly perceive and evaluate the host environment and its actors (Mendenhall and Oddou 1985). Ones and

Viswesvaran (1997) confirmed the appropriateness of using individual traits and temperaments for understanding differences in how managers respond to expatriate and repatriate experiences. More recently, Mol et al. (2005) conducted a quantitative review of the Big Five personality factors and found that they were as predictive of expatriate performance. However, Tan et al. (2005) contend that expatriates' emotions should also be considered as an important individual factor in the international adjustment model. They claim that expatriates' emotions play a major role in cross-cultural success, especially for individualists working in collectivistic culture for long periods of time. They further suggest that emotional demands caused by cultural differences in expatriate encounters impact negatively on their experience. Klein and Lee (2006) found that certain personality traits, such as openness, increased expatriate adjustment and their learning. Despite criticisms such as these, Okpara and Kabongo (2010) contend that Black et al.'s (1991) international adjustment model is a well-established theoretical model and allows for further inclusion of related factors on each level.

'Self-efficacy' was initially conceptualized as a belief in a person's ability to succeed in the enactment of a specific task (Bandura 1977). Sherer et al. (1982, cited in Shaffer et al. 1999) explored the concept of general 'self-efficacy' and defined it as 'an individual's past experiences with success and failure in a variety of situations which should result in a general set of expectations that the individual carries into new situations'. In case of expatriate adjustment, 'self-efficacy' refers to the ability to believe in one self and one's ability to deal effectively with the foreign surroundings, even in the face of great uncertainty (Mendenhall and Oddou 1985). Bandura (1977) first explored the impact of the concept 'self-efficacy' in social learning. Bandura (1977) suggests that individuals with higher levels of self-efficacy tend to persist in exhibiting new behaviours that are being learned longer than do individuals with less self-efficacy. Based on this, Black et al. (1991) propose that high level of self-efficacy would drive the expatriate to persist in exhibiting new behaviours which, in turn, would facilitate his/her degree of adjustment. They contend that expatriates with high overall self-efficacy persist in exhibiting newly learned behaviours despite negative feedback; they use the resulting learning to improve their adjustment.

Relational skills, or interpersonal skills, refer to a repertoire of tools and techniques that facilitate the formation of one's interpersonal ties. Through those ties, expatriates obtain necessary information and behaviour-relevant feedback in host cultures (Black et al. 1991). Interaction with host nationals is another important adjustment facilitating factor. Because interaction with host nationals can provide cues concerning appropriate behaviour in the new culture, greater interaction with host nationals would reduce novelty and positively affect adjustment.

Black et al. (1991) propose that the accuracy of the expectations held by expatriates is a key to effective international adjustment. The more accurate expectations expatriates can form, the more uncertainty they will reduce and the better their adaptation will be. Relational skills, or interpersonal skills, provide an important means of increasing the cues expatriates receive about what is expected and how they are doing regarding the expectations. In summary, interpersonal skills

have two main beneficial impacts on expatriate adjustment. First, the greater expatriates' interpersonal skills, the easier it is for them to interact with host nationals (Mendenhall and Oddou 1985). Second, the more expatriates interact with host nationals, the more information they can receive about what is and what isn't appropriate in the host culture and how they are doing. Black (1988) found a significant positive relationship between percentage of time spent with host nationals and general international adjustment. Bhaskar-Shrinivas et al. (2005) claim that relational skills allow the expatriates to gain familiarity with what is acceptable and/or unacceptable in the host cultures.

## 2. Prior international experience

Prior international experience refers to individuals' prior experience in living and/or working abroad. Prior international (working and/or non-work) experience that expatriates possess is likely to influence their adjustment to a host country (Okpara and Kabongo 2010). Previous international non-work experiences, such as traveling and studying, are likely to be associated with the extent to which expatriates adjust to foreign cultures (Okpara and Kabongo 2010). When people travel to foreign countries, they learn the behaviors, customs, and norms of those cultures through direct experience or through observation of the host nationals' behaviours (Bandura 1977). Past international experience provides expatriates with direct opportunities to learn a variety of skills. Intercultural communication, relocation, and adaptive skills will be gained, all of which should have a positive influence on the expatriates' cross-cultural adjustment (Black et al. 1991; Selmer 2002, 2004; Shaffer et al. 1999). Black (1988) suggests that the experience of a prior expatriation lowers the difficulties related to work adjustment. Black et al. (1991) suggest that previous international experience is an important source of information from which accurate expectations can be formed and the accuracy of the expectations held by expatriates is a key to effective international adjustment. Yamazaki (2005) argue that previous experience may change how expatriates adjust by allowing them to ignore what had not worked for them in the past and to concentrate on what did work. Research examining the extent of prior international working experience (Black 1988; Okpara and Kabongo 2010) has generally indicated a slightly positive association with adjustment, especially with work adjustment. However, Torbiorn (1988) found that specific length of previous overseas experience was not related to higher levels of adjustment. Therefore, quantity of prior international experience does not seem to necessarily relate to current international adjustment. These inconsistent findings indicate that exactly how previous international experience influences expatriate adjustment and what factors inhibit or magnify the impact of previous experience needs to be comprehensively investigated.

Selmer (2002) explored the possibility that prior international experience moderated the relationship between current assignment tenure and adjustment, studying western expatriates in Hong Kong. His results showed that the impact of prior Asian experience on the novice group (less than one year on an international assignment) was significant, but prior international experience outside Asia was not significant for either group. In the light of Selmer's (2002) research results,



Takeuchi et al. (2005) organized previous international experience along two dimensions (domain (work/non-work) and cultural specificity) and examined the effects of expatriates' current past international experience on their cross-cultural adjustment. They targeted 243 Japanese expatriates working in the United States and their results indicate that past international experience moderates the relationship between current assignment tenure and both general and work adjustment. Takeuchi et al. (2005) made explanations to previous inconsistent research findings regarding the impact of prior international experience: the interaction effects of previous international experience differed depending on the measurement mode being used. The interaction figures for the length-based measures of prior international experience illustrated both direct and indirect effects, while the number-based measure of prior international experience only exhibited the mediating effects. Takeuchi et al. (2005) further conclude that previous international experience acts as a moderator rather than as an antecedent to expatriates' cross-cultural adjustment. Bhaskar-Shrinivas et al. (2005) also examined the mediating influences of prior overseas assignments. They suggest that time spent on current assignment may enhance the effect of previous international experience on work adjustment and expatriates may leverage past experiences better as they stay on assignments longer. As their assignments progress, expatriates may be better able to pick out the experiences that best enable them to adjust to their work surroundings.

#### **2.2.2.2 Job-Related Factors**

Black (1988) reviewed the job-related factors that were hypothesized to influence (facilitate or inhibit) expatriate adjustment based on both international adjustment and domestic adjustment literature and proposes four job-related factors that can increase the uncertainty, uncontrollability, unfamiliarity, or unpredictability of the new work role and consequently inhibit the adjustment. These four adjustment inhibiting job-related factors are: role novelty (role novelty involves the difference between the past role and the new role), role ambiguity, role conflict, and role overload. Moreover, he proposed three job-related factors that have the potential for reducing the uncertainty and facilitating expatriate adjustment: role discretion, previous transfer or previous overseas work experience, and pre-departure knowledge.

International assignments are often associated with policy and procedural conflicts with parent companies (Gregersen and Black 1992). Bhaskar-Shrinivas et al. (2005) further explain that role clarity refers to exact understanding of position requirements; role discretion refers to decision-making autonomy; role novelty refers to differences between host and native country work roles; and role conflict refers to incompatible cues regarding job expectations. These four job-related factors are likely to influence expatriates' ability to adjust to the new environment. For example, role clarity may reduce the ambiguity associated with foreign work surroundings, whereas role discretion may enable expatriates to use previously



employed behavioural mechanisms to minimize that ambiguity. Bhaskar-Shrinivas et al.'s (2005) meta-analyses using data from 8474 expatriates in 66 studies provided support for a significant correlation between job role clarity and work adjustment. Obviously, the uncertainty regarding objectives and role requirements are the strongest stressors in expatriates' overseas work environments.

(a) Current assignment tenure

Black (1988) also found a significantly positive relationship between the length of current assignment tenure and work adjustment. It is reasonable to argue for a positive relationship between the length of time in a current work assignment (current international assignment tenure) and expatriate adjustment. When expatriates initially arrive in the host country, they face considerable uncertainty about many different aspects of both life and work. However, over time, they are likely to acquire information that enables them to function more effectively in the new environment. With prolonged exposure to the differences of the host culture, expatriates are likely to become more familiar with the general surroundings and find more suitable standards and become better adjusted (Takeuchi et al. 2005).

Takeuchi et al. (2005) examined the effects of current assignment tenure on expatriate adjustment, studying 243 Japanese expatriates working in the United States. Their results showed that current assignment tenure had significant relationships with expatriates' general and work adjustment. Takeuchi et al. (2005) propose that the time spent in an international assignment is very important for expatriates' work adjustment and suggest researchers adopt a time perspective for understanding expatriate adjustment. Longer tenure increases opportunities for expatriates to learn appropriate work behaviours through direct as well as vicarious modelling (Bandura 1977). In addition, an extended period of time is also required before expatriates are fully accepted by their peers and develop work relationship with their peers. Accordingly, the length of current assignment tenure is related to an enhanced understanding of the culture of a host country and an increased ability to adapt to the host country (Takeuchi et al. 2005). Black and Mendenhall (1991) define 'time to proficiency' as the period it takes an employee in a new job to reach an acceptable performance level. The time expatriates take to become proficient after transfers may have several important implications both for themselves and their organizations. Typically, the total costs for an organization of an international assignment will exceed the total contribution an expatriate makes for some time during a post-entry period of settling-in. Hence, the longer the time to proficiency, the greater the balance of costs will be to the organization. It would be in the interest of both the expatriate and the assigning organization to keep the time to proficiency as short as possible.

### 2.2.2.3 Organizational Factors

Organizations' selection criteria and mechanisms are also important expatriate adjustment influencing factors. Black et al. (1991) claim that the closer the selected

expatriate matches the needs of the organization, the easier the expatriate's adjustment after entering the international assignment. Also, the greater the difference between the organizational culture of the subsidiary organization in the foreign country compared to the organization in the home country (i.e. high organizational culture novelty) the more difficult the expatriate adjustment would be (Black et al. 1991).

Moreover, logistical support from the organization, parent firm assistance with day-to-day living, such as help with housing, schools, grocery stores, and so on, could potentially reduce uncertainty associated with international assignments and therefore facilitate expatriate adjustment (Black et al. 1991). Social support from co-workers and logistical support from the parent company can play important roles in easing adjustment. By providing expatriates with information about culturally suitable norms and behaviours in their work context, social support from co-workers reduces uncertainty emanating from an expatriate's new circumstances. Logistical support, on the other hand, could assist adjustment by making critical resources available to the expatriate at times of necessity and thus, meeting the demands of the new environment. In a study by Guzzo et al. (1994), expatriates' judgments of sufficiency of employer benefits and their perceptions of support were significant predictors of organizational commitment and intention to leave. Organization's social support, defined in terms of the sources and quality of helping relationships, acts as a stress buffer and has an indirect effect on strains such as job dissatisfaction.

#### **2.2.2.4 Non-work Factors**

The present research will also discuss the non-work factors that influence expatriate adjustment from two aspects: expatriate's family's adjustment and host culture novelty.

##### **(a) Expatriate's family's adjustment**

Poor cross-cultural adjustment of a spouse is likely to inhibit an expatriate's adjustment. In Tung's (1982) survey of American MNC executives, she found that these executives believed that a spouse's inability to adjust to the foreign host culture was the number one reason for expatriate failures. Tung (1982) further claims that an expatriate's family's inability to adjust is the biggest reason for the expatriate's inability to make the transition. Black (1988) contends that the expatriate's family's ability to adjust to the new culture/country has a significant impact on the expatriate's transition at work and adjustment. Black and Stephens (1989) investigated a large sample of American expatriates on assignment in several different countries and their spouses. They found positive and significant relationships between expatriates and spouse cross-cultural adjustment. In a recent study by Black and Stephens (1989), family situation was rated by expatriates as the most important contributor to successful international assignments. Bhaskar-Shrinivas

et al.'s (2005) meta-analyses using data from 8474 expatriates in 66 studies provided support for the idea that there is a strong correlation between spouse and expatriate adjustment.

(b) Culture novelty

There is a wealth of evidence that cultural differences can act as important barriers for business expatriates. As we discussed in Sect. 2.1.3 ('cultural differences between nations'), Chinese culture is highly contrasted with western (American and Western Europe) cultures. Western expatriate managers experience high culture novelty when they work in China. Mendenhall and Oddou (1985) refer to culture novelty as culture toughness and suggest that some countries, like China, seem to be more difficult to adapt to than others. They claim that the greater the difference between the cultures of the host country compared to the home country, i.e. high culture novelty, the more difficult would be the expatriate adjustment. Torbiorn (1988) noted that culture novelty has its largest impact on expatriates during the first two years of their assignments. After that, the impact of culture novelty diminishes somewhat. Some authors such as Pires and Stanton (2005) question the efficacy of culture immersion strategies. They contend that cultural values and norms in the individual typically are not changed by simply living in, or learning the language of another culture.

According to Selmer's (2002) study of 36 UK-based companies, he found that respondents from similar cultures (e.g., USA) were as likely to report adjustment problems as expatriates assigned to more dissimilar cultures like China. He concluded that the degree of cultural novelty of the country does not seem to have any correlation with the outcome of the international assignment. Based on in-depth interviews of ethnic Hong Kong Chinese business managers assigned to China, Selmer and Shiu (1999) found that the perceived cultural closeness seemed to build up expectations of easy and quick adjustment, which could, if it was not accomplished, result in frustration and withdrawal. Furthermore, comparing the adjustment of western and overseas Chinese business expatriates in China, Selmer (2002) found that although the westerners perceived a higher degree of culture novelty than the overseas Chinese, they were better adjusted in work environment. More recently, Selmer (2006) examined 165 western business expatriates assigned by western firms to China to find out whether the culture novelty is a relevant factor in assessing the adjustment of business expatriates. Their results showed that there was no significant relationship between culture novelty and expatriate adjustment.

A possible explanation for this is that an expatriate from a very different culture, may be tolerated and given the benefit of the doubt going through the process of trying to adjust to a new culture. An expatriate from a similar or presumed identical culture, on the other hand, could be treated with less patience and given less latitude for culturally deviant behaviours (Selmer 2006). Expatriates, overlooking any possible cultural differences that may exist in foreign locations with a similar culture, exhibiting even minor inappropriate behaviours, will most probably be unfavourably assessed. Hung (1994) argues that in China, Hong Kong Chinese may

be judged by different standards and more harshly than a westerner for any mistake made because he/she is presumably knowledgeable about Chinese etiquette and manners and would be expected to fully understand the appropriate social protocol and behave accordingly.

### ***2.2.3 Adjustment of Expatriates in China***

Since the introduction of the ‘Open Door’ policy in the late 1970s, China has undergone enormous social and economic transformations. In 1979, when China opened up for foreign investment, foreign businesses started to move into claim a share of the country’s vast markets. China continues to attract more foreign direct investment than any other developing country. However, many parts of the Chinese mainland still have the character of a developing country. China has enjoyed an average annual growth rate of 9 per cent since 1980, partly because of a huge inflow of foreign direct investment (FDI). The country’s entry into the World Trade Organization has accentuated its importance as a current and potential market for Western and other international business firms. China has emerged as the world’s most desirable market (Selmer 2006).

Selmer (2006) indicate that wholly owned subsidiaries in mainland China perform better if the companies have subsidiaries elsewhere in Greater China. The area ‘Greater China’ encompasses mainland China, Hong Kong, Singapore, and Taiwan (Selmer 2006). In doing so, business firms may accumulate substantial benefits in terms of enhanced experience of their expatriate staff that may facilitate their eventual entry into mainland China. Selmer (2006) examined the comparative adjustment of expatriates in Greater China and their empirical findings suggest that adjustment of business expatriates is better elsewhere in Greater China than in mainland China. He further proposed an expansion strategy for the internationalization of an organization that using other Greater China locations, like Singapore or Hong Kong, as a stepping-stone and source of experience in the ultimate quest to enter mainland China.

Obviously, interpersonal interactions are relatively difficult in China in the absence of a common language. The official language of China is Mandarin, but, beside that, local dialects are spoken in different regions. Business expatriates in China tend to see language differences as a fundamental obstacle to interaction adjustment. The language barrier is substantial, despite the fact that the level of English proficiency is generally rising in China. Accordingly, there is reason to believe that western expatriate managers in China have a lower degree of interaction adjustment than their general adjustment. Many western business expatriates found their assignment in China frustrating (Selmer 2006). General adjustment for western expatriates in Beijing and Shanghai, China should be relatively easy. Both Beijing and Shanghai are highly dynamic cities with a good provision of modern conveniences. Living conditions in general are good, with ample supply of Western and Asian food, excellent shopping, good housing conditions, good health care

facilities as well as modern entertainment facilities and opportunities. With regard to anticipatory adjustment, it has been argued that previous international experience may be an important source from which accurate expectations can be formed (Church 1982) and that ‘several previous international adjustment experiences would provide more information from which uncertainties could be reduced and accurate expectation formed’ (Black et al. 1991, p. 306). Empirical evidence has also shown that prior international experience facilitates an individual’s ability to function and work effectively (Takeuchi et al. 2005; Selmer 2002) and the more contact assignees have had with the host culture, the greater their cross-cultural adjustment. This leads to the present research’s first hypothesis:

*Hypothesis 1* Duration of managers’ international experiences in the host culture will positively influence their adjustment to the current international assignment.

## 2.3 Experiential Learning Theory

Experiential learning theory (ELT) is a learning theory that is characterized by six basic propositions (Kolb 1984).

1. Learning is best conceived as a process, not in terms of outcomes (p. 26).
2. Learning is a continuous process grounded in experience (p. 27).
3. The process of learning requires the resolution of conflicts between dialectically opposed modes of adaptation to the world (p. 29).
4. Learning is a holistic process of adaptation to the world (p. 31).
5. Learning involves transactions between the person and the environment (p. 34).
6. Learning is the process of creating knowledge (p. 36).

Despite the wide acceptance of Kolb’s experiential learning theory, there are salient issues concerning the structure and validity of its use. Kolb’s theory has been criticized for logical inconsistencies in theory construction and for the psychometric properties of the learning style inventory. In the 1970s, critical analysis began to emerge regarding the theoretical limitations of Kolb’s theory. Critics mainly questioned the psychometric properties of its measure. In response to these criticisms, Kolb redesigned the inventory in 1986 (Mainemelis et al. 2002). Research results indicated that the updated versions largely addressed earlier concerns related to measurement validity (Mainemelis et al. 2002). However, researchers still pointed out several issues concerning data validity and ipsative measurement of the revised model of the learning style inventory. Reynolds (1997) claim that Kolb’s experiential learning theory is in decontextualizing learning the concept of style which may provide a discriminatory basis for dealing with difference in gender or race. DeCiantis and Kirton (1996) argue that Kolb’s theory conflated three unrelated elements (cognitive style, cognitive level and cognitive process) and attempted to measure all three using a single instrument. They further contend that the experiential learning model is unrelated to style but rather is a

‘map’ of the learning process (DeCiantis and Kirton 1996). De vita (2001) claims that the cognitive nature of Kolb’s theory over-emphasizes the role of the individual and dedecontextualizes the learning process. Kolb (1999) responded to this critique by saying that this critique has been more focused on the theory than the instrument examining the underlying assumptions of the experiential learning theory; however, if the role of the learner is disproportionate to the process, results from the measure instrument would not have consistency and validity. Kolb’s experiential learning theory emphasizes the central role of the experiences and the individual. Since the experiential learning theory (ELT)’s first statement in 1971 (Kolb 1971, cited in Kolb 1986), there have been many studies using ELT to advance the theory and practice of experiential learning. The July 2005 update of the Experiential Learning Theory Bibliography (Kolb and Kolb 2005) includes 1876 studies. Because Experiential Learning Theory is a holistic theory of learning that identifies learning style differences among different academic specialties, it is not surprising to see that ELT research is highly interdisciplinary, addressing learning and educational issues in many areas. An analysis of the 1004 entries in the 1999 ELT bibliography (Kolb et al. 2001) shows that 207 studies in management, 430 in education, 104 in information science, 101 in psychology, 72 in medicine, 63 in nursing, 22 in accounting, and 5 in law. About 55 % of this research has appeared in refereed journal articles, 20 % in doctoral dissertations, and 10 % in books and book chapters.

### ***2.3.1 Experiential Learning Process and Cycle***

Kolb (1984) defines learning as ‘the process whereby knowledge is created through the transformation of experiences’. According to ELT, learning requires people to resolve a dialectic confrontation both when they grasp experience and when they transform experience. The learning processes lie in the bases of four adaptive learning modes that create the experiential learning cycle (Mainemelis et al. 2002). These four adaptive learning modes are concrete experience, reflective observation, abstract conceptualization, and active experimentation respectively. Zull (2002) supported ELT’s learning cycle from a biological perspective of human brain mechanisms, based on the examination of left-brain functions that correspond to the four adaptive learning modes.

### ***2.3.2 Learning Style***

According to ELT, an effective learner is required to use each of the four fundamental learning abilities at the base of these four adaptive modes (Kolb 1984). Kolb’s learning style that he proposed in his Experiential Learning Theory (1984) is influential in explaining aspects of individual differences in modes of adaptation

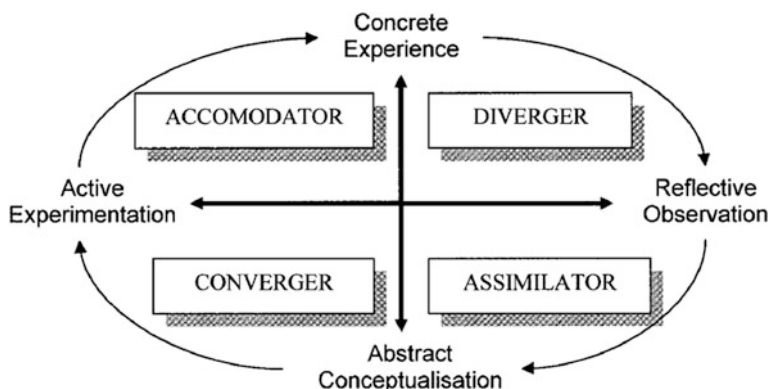
and adjustment in learning. Yamazaki (2005) illustrates that learning styles refer to cognitive, affective, and physiological behaviours that perform as relatively stable indicators of how people perceive, interplay with, and respond to their outside environment in learning situations. In Kolb's learning model, concrete experience (CE) abilities call for being involved in experiences and dealing with immediate human situations in a subjective manner; in contrast, abstract conceptualization (AC) abilities require using logic, ideas, and concepts. Reflective observation (RO) abilities require understanding the meaning of thoughts and situations by carefully watching and listening; in contrast, active experimentation (AE) abilities demand actively influencing people and changing situations.

A combination of two learning abilities constitutes an associated learning style (Kolb 1984; Kolb and Fry 1975). Learning style denotes an individual's general preference for using two sets of learning abilities over other two. The diverging learning style specializes in the two modes CE (feeling) and RO (reflecting), while the converging learning style specializes in AC (thinking) and AE (acting). The assimilating learning style specializes in AC and RO, whereas the accommodating learning style specializes in CE and AE. It should be noted that the names quoted to these learning styles were originally diverger, converger, assimilator, and accommodator. To emphasize the dynamic nature of learning style, the latest version of the learning style inventory has changed the style names from diverger to diverging, from converger to converging, from assimilator to assimilating, and from accommodator to accommodating accordingly (Kolb and Kolb 2005).

Individuals with diverging learning styles are best at viewing concrete situations from many different points of view (Kolb 1984). The style is labelled 'diverging' because a person with it performs better in situations that call for generation of ideas, such as a 'brainstorming' session. People with diverging learning styles have broad cultural interests and like to gather information. They are interested in people and tend to be imaginative and emotional. On the other hand, an individual with a converging learning style is best at finding practical uses for ideas and theories (Kolb 1984). They have the ability to solve problems and make decisions based on finding solutions to questions or problems. People with converging learning styles prefer to deal with technical tasks and problems rather than with social and interpersonal issues.

Individuals with assimilating learning styles are best at understanding a wide range of information and putting it into concise, logical form (Kolb 1984). People with assimilating learning styles are less focused on people and more interested in ideas and abstract concepts. An individual with an accommodating learning style is best at doing things, carrying out plans and tasks, and getting involved in new experiences. They prefer to solve problems in a trial-and-error manner, relying on their own intuition or other people for information, rather than their own analytic ability. People with accommodating learning styles are inclined to learn from primarily "hands-on" experience. Accommodating learning style is important for effectiveness in action-oriented careers where one must adapt oneself to changing circumstances (Armstrong and Mahmud 2008). People with accommodating learning styles tend to pursue careers in organizations and businesses where they can bring to bear their competencies in acting skills: Leadership, Initiative, and





**Fig. 2.3** Kolb's learning styles

Action (Kolb et al. 2001). Diverging, assimilating, converging, and accommodating learning styles are the four fundamental learning styles in experiential learning theory. Figure 2.3 describes Kolb's experiential learning style model.

Recent theoretical and empirical work shows that the original four learning styles can be expanded to nine distinct styles (Kolb and Kolb 2005). Learning styles appear as an individual's preference for a particular region of the learning space that enables us to discriminate the individual preference in more detail. Kolb (1984) identified four additional learning styles, which they identified as Northerner, Easterner, Southerner, and Westerner. Kolb and Kolb (2005) describe and develop these styles in more detail based on Hunt's analysis, which emphasizes the impact of the style's weakest learning mode on the learner's learning process.

The Northerner specializes in CE while balancing AE and RO, in which feeling serves as an integrative link between acting and reflecting dialectic modes. People with northern learning styles learn by involving themselves in new and challenging situations while being comfortable in the outer world of action and the inner world of reflection. The Easterner specializes in RO while balancing CE and AC, in which reflection and observation serve as an integrative link between feeling and thinking dialectic modes. People with eastern learning styles learn by deep reflection as well as the ability to be both feeling oriented and conceptual. The Southerner specializes in AC while balancing AE and RO, in which thinking serves as an integrative link between acting and reflecting dialectic modes. People with southern learning styles excel in inductively developing a particular concept or idea and deductively evaluating the validity and practicality of that concept or idea by testing them in the real world. The Westerner specializes in AE while balancing CE and AC, in which acting serves as an integrative link between feeling and thinking dialectic modes. People with western learning styles combine the ability of finding solutions to questions or problems based on their technical analysis as well as by relying on people and immediate concrete situations as sources of information. The balancing learning style (Mainemelis et al. 2002) refers to individuals who position



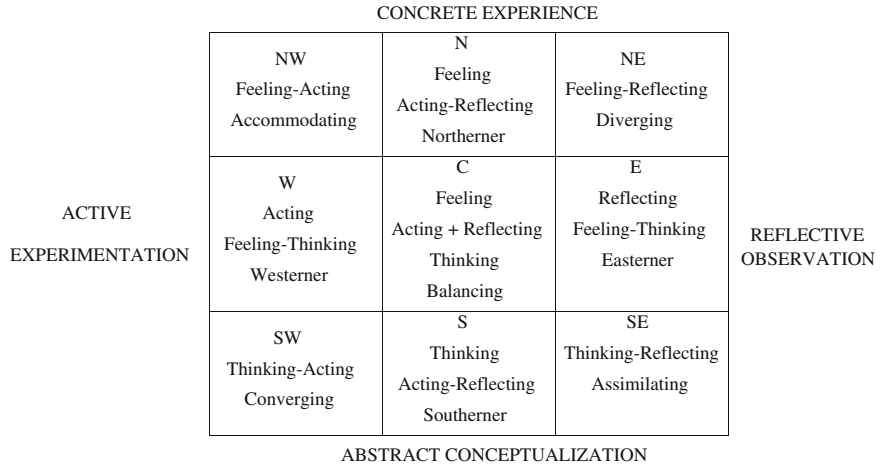


Fig. 2.4 Kolb’s nine-region learning style type grid

themselves in the central region. People with balancing learning style integrate CE and AC and RO and AE. They are equally comfortable in moving across two dialectic modes in a balanced manner. Overall, Fig. 2.4 describes Kolb’s Nine-Region Learning Style Type Grid.

2.3.2.1 Influence of Culture on Learning Style

Among learning theories, Kolb’s experiential learning model has received special attention to the examination of cross-cultural activities (Hoppe 1990). In examining cross-cultural differences in learning styles and other learning programs, Kolb’s learning model has been extensively applied in the field of cross-cultural and international studies (e.g., Katz 1988; Hoppe 1990; Yuen and Lee 1994; Jackson 1995; Auyeung and Sands 1996; Fridland 2002; Barmeyer 2004; Yamazaki and Kayes 2007, etc.). Learning styles are determined by the interplay between people and their environment (Kolb 1984). Kolb (2001) further explains that such interplay shapes learning styles at five levels (Kolb et al. 2001): psychological type, educational specialization, professional career, current job, and adaptive competencies. In addition to these five levels, Yamazaki and Kayes (2004) indicate that the culture of the country around people is the sixth level of interplay that shapes learning styles. The continuity and development of a certain learning situation fitted to each country relates to the way in which learning styles vary among cultures. Culture as an environmental characteristic has a great influence on learning styles. Certain learning styles within one country tend to developed in learning environments that are influenced by its particular culture. Many researchers have examined the interplay between the person and the environment at the cultural level. Hayes and Allinson (1988) suggest that the culture of a country may be one of the powerful

socialization agents that have a great impact upon the development of individuals' learning styles. Hofstede (1997) contends that a country's culture shapes its peoples' preferred modes of learning through their socialization experiences. Pratt (1991) also argues that learning styles may be distinguishable across cultures according to his comparative study of self-conceptions between China and the United States. Furthermore, Yamazaki (2005) conducted a comprehensive analysis on which culture is related to which learning style or learning ability. He concentrated on a theoretical and empirical comparative analysis between Kolb's learning styles and six cultural typologies (high context vs. low context cultures, shame vs. guilt cultures, strong uncertainty avoidance vs. weak uncertainty avoidance cultures, M-type organizations vs. O-type organizations, interdependent-self vs. independent-self, and field-dependent vs. field-independent cultures) in three research areas: Anthropology, Cross-cultural management, and Cross-cultural psychology. Yamazaki (2005) proposes a close examination between the cultural component and the other five levels of factors (i.e. psychological type, educational specialization, professional career, current job, and adaptive competencies) to further explore how individual learning styles are shaped and developed in a particular culture.

Kaze (1988, cited in Yamazaki 2005) examined the learning styles of 821 Israeli undergraduates with different majors by using Kolb's original 9-item learning style inventory. She suggests that the interplay between the typical Israeli culture and learning style is evident in the orientation toward the AE mode. She also made the cross-cultural comparison of learning styles between Israel and the US revealed that the Israeli are far more orientated toward the active mode than the American. Smith and Kolb (1985) examined 1446 American samples and suggest that the overall American subjects are shifted more toward the AC and AE mode. Therefore, they concluded that the converging learning style may be a typical learning style of the American samples as a whole. Yuen and Lee (1994) investigated 1032 Singapore undergraduates with eight different majors and compared the learning styles of Singapore students with those of the American undergraduate students in Ruble's research (Yuen and Lee 1994). Their study reveals that the Singapore students are more abstract and reflective than the American students are. McMurray (1998) investigated the learning styles of 160 Japanese undergraduates with economics and science majors. He found that the learning preferences of Japanese subjects were stable during two consecutive semesters and were orientated toward the CE and RO modes, which is different from the American subjects that are orientated toward AC and AE modes (Kolb 1984; Smith and Kolb 1985). Barmeyer (2004) examined learning styles of 132 French students, 98 German students, and 123 Quebecois students in business administration and found that French and Quebecois students are significantly more concrete than German students; German students are significantly more abstract and active than French and Quebecois students. French students are significantly skewed toward the reflective observation learning mode. Focusing on the learning style distribution of these students, the dominant learning styles of French students and Quebecois students are both Assimilating and Diverging, while that of German students are Assimilating and Converging.

More recently, Yamazaki (2005) summarized five research studies about learning styles on American subjects: Smith and Kolb (1985), Kolb and Fry (1975), Geiger and Pinto (1991), and Boyatzis and Mainemelis (2000) and concluded that American subjects possess more abstract and active learning modes and tend to prefer the converging learning style. Pratt (1991) conducted a comparative study of self-conceptions between Chinese and Western societies and claimed that learning styles are distinguishable across these two cultures. Therefore, there is a variation of learning styles among different countries and societies. The relationship between the learning style and countries and societies suggest that a dominant learning style in one country will be indicative of learning characteristics in that country at a macro environmental level. Existing research has demonstrated cultural distinctions between Western countries and China on several important dimensions. As we have discussed in the section 'cultural differences western expatriates experienced in China', Chinese culture tends to be a high-context culture whereas Western countries tend to toward a low-context culture (Hall 1976). Chinese culture is more collective and the Western culture is more individualistic (Hofstede 1997).

### 2.3.2.2 Chinese Learning Style Versus Western Learning Style

Auyeung and Sands (1996) examined the relationship between the Individualistic-Collective cultural dimension and Kolb's (1984) learning style. They analyzed learning styles from a total of 303 Australian accounting students, whose country is representative of Individualism culture, and 172 accounting students from Hong Kong and 157 accounting students from Taiwan, whose country is representative of Collective culture. Their results illustrated that Individualistic culture is more linked with the Active learning mode, while Collective culture is more associated with the reflective learning mode. Students from Chinese cultures are significantly more reflective and abstract and less active and concrete than are the Australian students. Fridland (2002) examined learning style difference between Chinese teachers (N = 100) of English as a foreign language and American teachers (N = 105) of English as a second language and reported that Chinese learning styles were distributed more at the diverging learning style (42 % of the Chinese teachers is the diverging learning style, 28 % is the assimilating style, 18 % is the converging style, and 12 % is the accommodating style), while American learning styles stayed more at the accommodating learning style. With regard to the differences in learning abilities, Fridland (2002) contends that Chinese are oriented more toward the reflective observation and less toward the active experimentation, while Americans' learning orientations are quite opposite to Chinese ones.

Japanese culture derives from Chinese culture and Confucian ethics is rooted into both of them. It is reasonable to agree that Chinese and Japanese have similar learning preferences. Considering Japanese learning style also supports the present research's main hypothesis that Chinese learning preferences are oriented toward the concrete experience and the reflective observation learning modes. McMurray

(1998 cited by Yamazaki 2005) investigated the learning styles of 160 Japanese undergraduate students with economic and science majors and found that the learning preferences of Japanese participants were highly skewed toward the concrete experience and the reflective observation learning modes.

In light of American learning style, several studies in the field of management learning are harmonized with their results, which indicate that American managers are inclined toward the abstract conceptualization and the active experimentation learning modes (Boyatzis and Mainemelis 2000). Boyatzis and Mainemelis (2000) claim that American managers' learning styles are mostly associated with the Converging and the Assimilating learning styles. Yamazaki and Kayes (2007) examined cultural differences in learning styles between Japanese managers ( $N = 267$ ) and American managers ( $N = 126$ ) within the same Japanese MNCs operated in the US. They concluded that Japanese managers are more concrete and reflective, whereas American managers are more abstract and active. They proposed that the dominant learning style of Japanese managers is the diverging learning style and that of American managers is the converging learning style.

Learning styles are affected by the interplay between people and their environment (Kolb 1984) and according to Kolb et al. (2001) such interplay shapes learning styles at five levels: psychological type, educational specialization, professional career, current job, and adaptive competencies (Kolb 1984; Kolb et al. 2001). Yamazaki and Kayes (2004) later extended Kolb's model to account for cultural influences on the process of learning and learning styles. Previous researchers have also argued that cultures have an influence on how people learn (e.g. Hayes and Allinson 1988). With regard to cultural differences in learning styles, Smith and Kolb (1985), Kolb and Fry (1975), Geiger and Pinto (1991), and Yamazaki and Kayes (2007) all concluded that American subjects possess more abstract and active learning modes and therefore tend to adopt a converging learning style. Research has also demonstrated cultural distinctions between Western countries and China with regard to preferred ways of grasping experience. For example, Hall (1976) claimed that Chinese culture tends to be a high-context culture whereas Western countries such as the USA tend to toward a low-context culture. The former requires its members to be sensitive to immediate environments through feelings, and long lasting interpersonal relationships are crucial for determining the meanings of messages conveyed in communication. Yamazaki (2005) reasoned that these high context cultures (e.g. China) are associated with the CE learning mode where members tend to grasp experience through feeling in proximate contexts. Conversely, in low context cultures, the immediate environment and non-verbal behaviours are less crucial in generating and interpreting meanings, whereas explicit verbal messages are more important in communications (Hall 1976). Yamazaki (2005) reasoned that these low context cultures (e.g. USA) are conceptually associated with the AC mode where abstract and symbolic presentation in a logical manner forms the central method of communicating with others.

Other comparative studies of Chinese and American societies also demonstrated that learning styles are distinguishable across these two cultures (Pratt 1991). In

particular, Yamazaki (2005) re-analysed the data from a number of previous studies of learning styles across cultures to determine which country or culture is related to which learning style. With regard to transforming experience during the learning process (AC-RO), he concluded that Chinese culture is highly contrasted with American culture reporting that 'Chinese are oriented more toward reflective observation and less toward active experimentation, while Americans' learning orientations are quite the opposite to Chinese ones' (pp. 538).

Summarising the literature reviewed above, it can be concluded that Chinese are generally oriented more toward RO than AE and more toward CE than AC. Conversely, Westerners' learning orientations are generally more toward AE than RO and more toward AC than CE. This leads to one exploratory question regarding the influence of culture on learning styles.

Exploratory Question 1: To what extent do Western expatriate managers differ from host Chinese managers with regard to learning styles?

### **2.3.2.3 Influence of Environmental Change on Learning Style**

The change of environmental demands also accrues the shift of learning style. The longer the exposure of the environmental demands, the greater the tendency for a person to specialize more in the learning style that is matched with such demands. This is similar as a socialization process in which individual learning style as a personal attribute grow to more closely match the environmental demands (Kolb 1984). Zhang (2001) contends that styles can change with situations, time, and demands and therefore, it is possible to provide avenues for change to match needs or effectiveness.

Gyen (1980, cited in Kolb, 1984) examined learning style transitions/adaptations in two professional careers: engineers and social workers. His study illustrated that a change of job demands directs the orientation of learning styles over their career paths. The engineers' dominant learning style was the converging orientation, but they developed concrete experience and reflective observation learning modes after they participated in managerial jobs. On the other hand, the diverging learning style was the typical learning style of social workers, but they developed abstract conceptualization and active experimentation learning modes after they held responsibilities for management and administration. The study of Gyen (1980) illustrated the influence of changing environmental demands upon learning styles: learning styles will change according to changes in the environment.

It could be inferred that expatriates' learning styles may change according to the learning orientation that is demanded by the host country. Environmental change may also cause expatriates' learning styles to be shifted towards the ones matched with the demands produced by new environments in the host country. The transition of learning styles is likely to occur in accordance with the amount of continuous time the expatriates have spent in the host country. Expatriates' learning styles

may evolve from one place to another in keeping with the consistency of their environmental change direction (Yamazaki and Kayes 2004). In this study, the researcher will examine western expatriate managers' learning style transitions over time when they working in China.

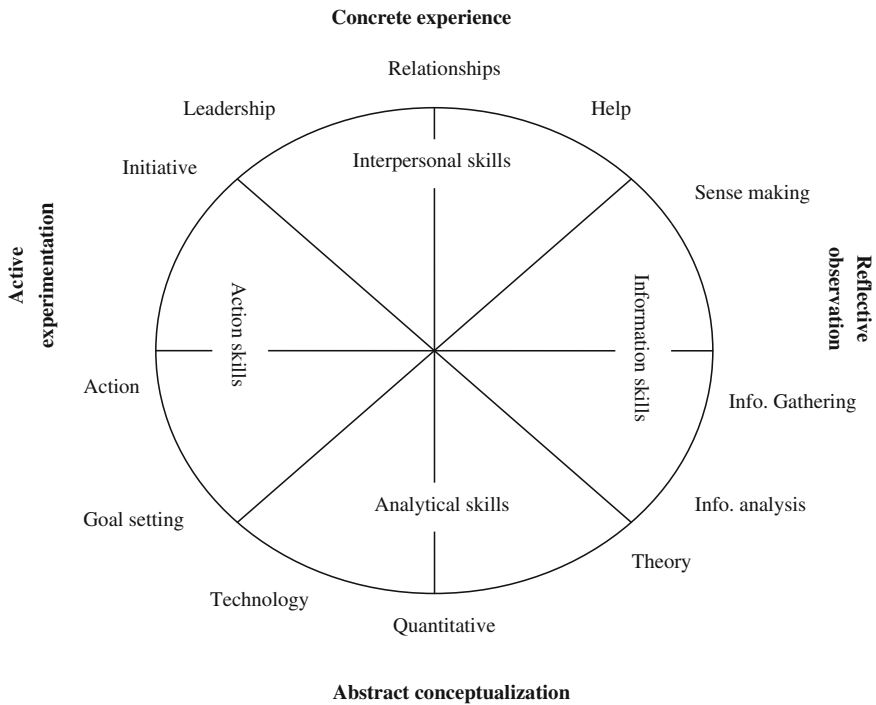
### **2.3.3 Learning Skills**

While learning styles involve four learning abilities and refer to generic adaptive competencies to the environment, learning skills reflect more situational, specific competencies required for effective performance on a variety of tasks (Kolb 1984). Because of the more explicit form of adaptive competencies in response to job demands in more confined environmental boundaries, learning skills may be easily discernible and detectable. The concrete experience (CE) mode encompasses three interpersonal skills: relationship building, leadership, and helping and understanding people. The reflective observation (RO) mode involves three perceptual skills: sense making, information gathering, and information analysis. The abstract conceptualization (AC) mode involves three analytical skills: theory integration, quantitative, and technology skills. Finally, the active experimentation (AE) mode includes three behavioural skills: goal setting, action, and initiative taking. Figure 2.5 presents the relationship between the four experiential learning modes and learning skills.

Yamazaki (2005) outlines a taxonomy of skills necessary for cross-cultural learning based on Kolb's experiential learning theory (1984). He identifies 73 learning skills that cluster into 10 thematic cross-cultural learning competencies. He also suggested that the difference between expatriates' cultural backgrounds may be reflected in the variation of expatriate adaptation strategies: which specific intercultural skills based on the ELT need to be developed for their intercultural adaptation.

#### **2.3.3.1 The Relationship Between Learning Skills and Learning Styles**

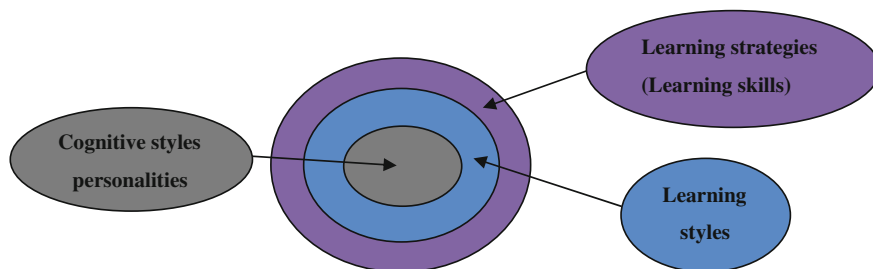
In terms of understanding the relationship between learning styles and learning skills, Curry's (1983) three layer onion model which is built upon her study of 21 cognitive and learning style instruments provides us with a useful heuristic (see Fig. 2.6). Curry (1983) proposes a heuristic model to organize the theory, resembling layers of an onion in which she places individual difference constructs. In the outer layer, Curry (1983) places what has been labelled as 'Instructional Preference' which refers to the individual's choice of environment in which to learn. She explains that the outer layer of the onion model is the most observable and interacts most directly with outward learning environments. This layer seems to be most related to the concept of the learning skills of experiential learning theory because



**Fig. 2.5** Experiential learning modes and learning skills

interplay between individuals and their situational environments makes a direct difference to the outer layer. Such interplay produces specific skills that can be greatly observed on the external surface where people perform in order to meet particular demands derived from their environments.

The middle layer of the onion model, labelled as 'Information Processing Style', is regarded as an individual's approach to assimilating information. Due to its relative de-coupling from the environment, it is believed to be more stable than the outer layer, though it can still be modified to a degree by learning strategies. The second layer represents information processing dimensions as a set of processes that function at the intersection between fundamental personality levels/individual differences and environmentally provided learning format choices. Experiential learning styles would be managed within this middle layer (Curry 1983, p. 11). The innermost layer of the model is labelled as 'Cognitive Personality Style', defined as an individual's approach to adapting and assimilating information, which does not interact directly with the environment and is believed to be a relatively permanent personality dimension. The innermost layer of the onion model concerns cognitive personality dimensions (such as cognitive style) that are characterized as reflective of the underlying and relatively permanent personality (Curry 1983, p. 14).



**Fig. 2.6** Curry's three layer onion model

### 2.3.4 Adaptive Flexibility

Based on the work of Piaget et al. (1984) in experiential learning theory suggests that adaptive flexibility is related to the degree that one integrates the dual dialectics of the learning process—conceptualizing/experiencing and acting/reflecting. Unlike learning style, which refers to more generic adaptive competencies to the world, and learning skill, which refers to more specific and situational competencies, adaptive flexibility describes the relatively stable changes that occur as individuals learn to adapt to changing circumstances over time. Adaptive flexibility describes how an individual learns to manage competing demands and deal with environmental complexity.

Kolb (1984), Boyatzis and Kolb (1993) suggest several strategies to increase adaptive flexibility. First, increase our ability to 'read' the situations and to use various learning styles in response. This can be accomplished through practice. When confronted with a situation, try to envision different approaches, i.e. learning styles, and the possible advantages of each. Second, strengthen our association with others who have a facility with the styles we are 'weakest' in. Including these people in our development process and utilizing their skills in dealing with unclear situations. Moreover, use our strengths to develop our weak areas. For example, a person can use his/her Active Experimentation style to set a priority to develop Reflective Observation skills; use his/her Concrete Experience style to solicit input from people high in Abstract Conceptualization.

#### 2.3.4.1 The Relationship Between Adaptive Flexibility and Self-development

Individual self-development is the dialectic process that is reaching toward a higher-level synthesis between social specialization and individual integrative fulfillment. It is attained through a dialectic process of adaptation to the world. Adaptive flexibility and the mobility it provides are the primary vehicles of individual self-development (Kolb 1984).



There have been many empirical studies about the relationship between adaptive flexibility and self-development. Kolb (1984) investigated the relationship between adaptive flexibility as measured by the Adaptive Style Inventory (ASI) and the level of ego development as measured by Loevinger's sentence completion instrument. In his study, there was a significant positive relationship between total adaptive flexibility and ego development level. Moreover, most of this co-variation in adaptive flexibility occurred in reflective observation and abstract conceptualization. Kolb (1984) also examined the relationship between adaptive flexibility as measured by the ASI and the level of self-direction as measured in a self-assessment workshop. The relationship between total adaptive flexibility and the person's degree of self-directedness was significantly positive in this study. In this research, the co-variation in adaptive flexibility was determined primarily in active experimentation. This suggests that those at higher levels of adaptive flexibility are more self-directed and display that directedness through wide variation of their active behaviour in different situations.

The development in experiential learning theory describes affective development in concrete experience as a process of increasing complexity in one's conception of personal relationships, resulting from integration of the four learning modes. As a result, experiential learning theory (1984) predicts that increasing adaptive flexibility, particularly in the realm of concrete experience, would be associated with increased richness in construing one's interpersonal world. A major component of internal structural complexity is the constructions which can be called upon to describe and manipulate one's thoughts and interactions with the interpersonal environment (Kolb 1984, p. 220). Kolb (1984) examined the relationship between adaptive flexibility as measured by the ASI and the level of cognitive complexity in relationships as measured by the total number of constructs a person used to describe his or her interpersonal world, which is also known as a cognitive mapping method. The result showed that total adaptive flexibility is positively correlated with individual cognitive complexity in relationships, especially in the area of concrete experience adaptive flexibility. Taken together, Kolb's results (1984, 1975) above suggest that overall adaptive flexibility and adaptive flexibility in the four adaptive modes are meaningful indicators of self-development. Total adaptive flexibility is significantly related to the level of ego development, to self-direction, and to the level of cognitive complexity in relationships.

Mainemelis et al. (2002) adds further construct validity for the hypothesis that individual adaptive flexibility is predictive of highly integrated and complex levels of adult development in their study through testing the relationship between balanced/specialized learning styles and adaptive flexibility. Their study also suggests that learning style that balances experiencing and conceptualizing shows greater adaptive flexibility in responding to experiencing and conceptualizing learning contexts. In this study, the researcher will examine the influence of international assignment experiences on the development of western expatriate managers' adaptive flexibility as well as the beneficial effects of adaptive flexibility.

## 2.4 Managerial Tacit Knowledge

As discussed in Sect. 2.2, learning is the process of creating knowledge (Kolb 1984). Formal learning alone is insufficient for the development of managers. What matters is the learning that takes place on the job (Wagner and Sternberg 1987). Practical intelligence is related more to managerial success than academic intelligence is, and therefore, the ability to learn informally on the job is a critical determinant of managerial success. The need to participate in informal forms of learning, such as expatriate learning, is linked to a form of knowledge mostly associated with experts and successful people: tacit knowledge. Oxford English Dictionary (1933) described tacit knowledge as the knowledge that usually is not openly expressed or stated. Tacit knowledge is believed to be one essential factor that distinguishes successful managers from others (Armstrong and Mahmud 2008). The ability to acquire tacit knowledge informally on the job is a hallmark of managerial success (Wagner and Sternberg 1987).

### 2.4.1 *Nature and Characteristics of Tacit Knowledge*

The term ‘tacit knowledge’ evolved from multi-disciplinary studies such as the philosophy of science by Polanyi (1966), ecological psychology, and organisational behaviour (Schon 1983). It has been utilised to describe knowledge that is obtained from daily experience which has an implicit and un-codified quality. The origin of tacit knowledge is often attributed to Michael Polanyi who described it in his famous quote, ‘we can know more than we can tell’ (1966: 4). In Polanyi’s (1966) book, he classified two types of knowledge: tacit knowledge and explicit knowledge. Anderson (1983) distinguished between procedural knowledge and declarative knowledge by referring to the former as knowledge about how to do something, and to the latter as knowledge about something. Declarative knowledge is consciously formed, controlled, and articulable, while procedural knowledge is identified as unconscious with automatic learning, which guides actions and decisions without being in our field of consciousness (Anderson 1983). Based on Anderson’s work, Sternberg and Horvath (1999) defined tacit knowledge as ‘knowledge that is grounded in personal experience, and is procedural rather than declarative in structure’. Wagner further defined tacit knowledge as ‘Work-related practical know-how that usually is not openly expressed or stated, and that usually is not directly taught’ (1993, p. 19). Sternberg and Grigorenko (2001) argued that all tacit knowledge is a subset of procedural knowledge.

Nonaka (1994) holds that there are two types of tacit knowledge: technical tacit knowledge and cognitive tacit knowledge. Technical tacit knowledge is created through actions and needs to be experienced to be learned and therefore, does not need language as the intermediary. In the technical dimension, the term ‘know-how’ is commonly used to describe the skills and crafts acquired in relation

to mastery of work (Nonaka 1994). Expertise is associated with this technical tacit knowledge: the ability to demonstrate flawless execution of tasks yet finding difficulty in articulating the principles behind it (Baumard 1999). On the other hand, mental models, perspectives, and beliefs make up the cognitive tacit knowledge and are deeply ingrained in the mind to the extent that they exist at the subconscious level and affect how individuals perceive the world. These pre-established cognitive patterns will act as a filter to incoming information, resulting in the formation of knowledge that is unique to an individual (Baumard 1999). Cognitive tacit knowledge can be transmitted through interaction or socialization involving the use of language. Beside these two types, Baumard (1999) suggests that implicit knowledge is another form of tacit knowledge. He claims that implicit knowledge is known and can be explicated, but rarely occurs because the knowledge often lies deep in our mind.

Choo (1998), along the same line as Nonaka, classifies tacit knowledge into cognitive and technical components. Moreover, he included the individual and collective perspectives in his stance on tacit knowledge. Individual tacit knowledge is knowledge that is acquired through experience, context-specific, and action oriented. Choo, however, contended that there is also another form of tacit knowledge which he called 'collective tacit knowledge', accrued by virtue of shared practices and tacit understandings in groups that work together (pp. 118–119). Collins (2001) contends that tacit knowledge is more diverse by indicating five different tacit knowledge types: concealed knowledge, mismatched knowledge, ostensive knowledge, unrecognised knowledge, and uncognized/uncognizable knowledge. Concealed knowledge refers to knowledge that is obscured either intentionally as a secret or unintentionally when the individual did not notice the existence of it. Mismatched knowledge refers to the group level, as it occurs when different groups focus on different problems, because the groups are not observing each other's work. Ostensive knowledge is knowledge that is inexpressible through verbal language. However, it can be articulated through pointing and showing. Unrecognisable knowledge is generated through imitating critical behaviour without noticing the importance. Uncognizable knowledge is typical in language, such as human's ability to speak in their native language without awareness of how they do it.

According to Sternberg and his colleagues (Sternberg 1997; Sternberg and Horvath 1999; Sternberg et al. 2000), the concept of tacit knowledge comprises three main features: procedural, practically useful, and without others' direct assistance. Firstly, tacit knowledge is procedural. Tacit knowledge is closely connected to action. It takes the form of 'knowing-how' as opposed to 'knowing-what'. This kind of 'knowing how' is called procedural knowledge: it is the knowledge that has a precise application (Winograd 1975, cited in Sternberg et al. 2000) or it can be stated that it is condition-action pairs of a general form (Nonaka 1994; Sternberg et al. 2000). Anderson (1983) suggests that tacit knowledge is a subset of life relevant procedures found in individual experience. This type of knowledge provides guidance for individual action and behaviour even though it is hard to transfer. Second, tacit knowledge is practically useful. Tacit knowledge is a

‘vehicle’ that enables people to achieve valued objectives. A highly valued objective requires a higher level of knowledge for it to be successfully achieved, hence this knowledge becomes very valuable (Sternberg 1997). Third, tacit knowledge is generated without direct assistance from others. Basically, tacit knowledge is attained personally by the individual when they are able to sort out the key lessons from their experiential learning and be able to identify crucial knowledge (Sternberg et al. 2000). Normally, individuals accumulate their tacit knowledge by means of personal experience of certain circumstances, or by trial and error, and it will gradually become their own unique knowledge that cannot be imitated by others. Individuals who learn knowledge formally do not accumulate levels of knowledge that are equivalent to the levels of knowledge accumulated by individuals who learn through experience or experiential learning. For the purpose of this research, the definition of tacit knowledge will be taken to be ‘knowledge that is grounded in personal experience, and is procedural rather than declarative in structure’ (Sternberg and Horvath 1999; Armstrong and Mahmud 2008).

#### ***2.4.2 Tacit Knowledge and Practical Intelligence***

Practical intelligence is one of the concepts that have been researched as an alternative to traditional views of intelligence. Traditional views suggest that the variety of competencies required for achievement can be integrated as general intelligence. Recently, however, several researchers contend that general intelligence presents a limited perspective of an individual’s ability to thrive in a successful life. For instance, Goleman (1995) and Mayer et al. (2000) propose emotional intelligence. Sternberg (1985, 1997) indicates a concept of creative and practical intelligence.

The concept of practical intelligence emerged from the tests traditionally used to measure intelligence. These measures were essentially related to academic rather than practical ability (Wagner and Sternberg 1986). Practical intelligence refers to the individual ability to identify optimal fit between themselves and needs of environment via adapting to the situation, or choosing a new environment in the quest of personally-valued goals (Sternberg et al. 2000). It is different from other kinds of intelligence. Practical intelligence involves not just adapting to environments, but also the shaping and selection of environments. The workplace is the best place to see practical intelligence in action. Most of the crucial rules of the workplace are unspoken. A few people excel at acquiring this type of knowledge.

Sternberg and colleagues (Sternberg 1985; Wagner and Sternberg 1986) extended the distinction in order to determine which attributes would differentiate academic and practical issues. Academic issues were identified by the following attributes: (1) formulated by others, (2) well-defined, (3) providing complete information, (4) characterised by having only one correct answer, (5) characterised by having one approach to the correct answer, (6) disembodied from ordinary experience, and (7) lacking or without intrinsic interest. Conversely, practical issues

(occurring with work-related problems) were identified by the following attributes: (1) unformulated or required reformulation, (2) inadequate information required for solution, (3) linked to daily experience, (4) weakly defined, (5) characterised by a variety of correct answers, each with liabilities as well as assets, (6) of personal interest, and (7) characterised by a variety of approaches for choosing problem solutions. It is logical to assume that the differences between academic and practical environments will mean that someone who is proficient in finding solutions to problems in one environment may not be able to transfer these skills to problem solving in the other environment. In addition, Sternberg and Wagner (1993) note that academic intelligence is accessed via conventional tests. In contrast to this approach, practical intelligence tests look at the relevant norms involved in the process of knowledge acquisition: informal context, commonly tacit, learned through observation and modelling, and not necessarily recognised at school.

The present study focuses on the concept of practical intelligence as it underlies the acquisition and utilisation of tacit knowledge (Wagner and Sternberg 1986; Sternberg and Horvath 1999; Sternberg et al. 2000). Tacit knowledge is one of the tools that can be used to measure the ability to learn from experience. Tacit knowledge reveals what individuals learn in everyday life that cannot be formally taught or conveyed. Scores that measure levels of practical intelligence are predictive of an ability to learn to solve practical problems at work. Nevertheless, they are less predictive of an ability to solve academic problems at school (Wagner and Sternberg 1986).

### ***2.4.3 The Structure of Managerial Tacit Knowledge***

A substantial amount of research has been undertaken into the nature of tacit knowledge in a variety of professions, such as nursing, education, medicine, accounting, law, management and so on (Armstrong and Mahmud 2008). These studies provide a valuable insight into the working of tacit knowledge in these various professions. Sternberg's work into the nature of tacit knowledge in various professions is particularly noteworthy (e.g., Sternberg et al. 1993; Sternberg et al. 2000; Sternberg and Grigorenko 2001; Sternberg and Wagner 1993; Wagner and Sternberg 1986, 1987) because it provides a framework and a sound methodological basis from which tacit knowledge can be studied.

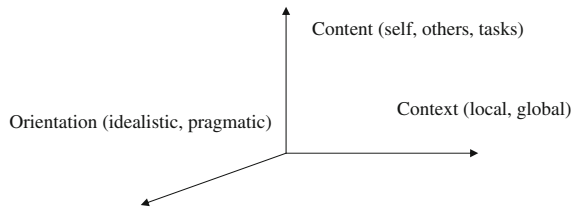
In the business and management domain, the difference between academic and practical approaches can be clearly demonstrated. Existent research has revealed that successful managers hardly ever refer to specific rules of thought in their approaches to problem solving (McCall and Kaplan 1985). They substituted this with an action-oriented approach at the initial problem solving stage by utilising analyses and action based on personal experience. Schon (1983) suggests that a significant amount of competent managerial behaviour appears as action that is almost spontaneous, based on intuition rather than rationality. It is 'ordinarily tacit, implicit in our patterns of action' (Schon 1983). In Wagner and Sternberg's (1987)

study of the role of tacit knowledge in the domain of business management, it became clear that there were significant variations in the level and content of tacit knowledge within business managers. These variations are believed to exist because the managers go through their experiences differently, and at different points in time and context. Wagner (1987) described tacit knowledge as having particular importance for managerial success and broke it down into three categories based on the content of managerial tacit knowledge:

- managing self: tacit knowledge about managing self refers to knowledge about self-motivational and self-organizational aspects of managerial performance;
- managing others: tacit knowledge about managing others refers to knowledge about managing one's subordinates and how to interact with one's peers and superiors;
- managing tasks: tacit knowledge about managing tasks refers to knowledge about how to do specific tasks well.

Managing self, others, and tasks defines the scope of managerial tacit knowledge based on the content of a situation. Managerial tacit knowledge in managing self concerns self-motivation as well as the self-organisational aspects of managerial performance. For example, what is the best way to handle a problem caused by procrastination? In this case, individuals need time management skills in order to organise, prioritise, and complete their workloads. This will minimize the problems caused by procrastination. Self-management can be perceived as the ability to increase productivity on a daily basis. Effective managing-self individuals are able to set a priority of a numbers of tasks and as a result, their time is allocated accordingly. Sometimes this means that deadlines for low-priority tasks are missed or that extra responsibility is delegated to subordinates (Sternberg et al. 2000). Managerial tacit knowledge in managing others resides in people management skills: the skills to manage subordinates, co-workers, and superiors. An example of this type of tacit knowledge can be seen in the art of persuasion: the power to convince a doubtful superior to accept a good idea. Another example is knowledge about how to assign tasks that will utilise the capabilities of a subordinate whilst downplaying their weaknesses (Wagner and Sternberg 1986). Managing others is the key to remaining on the executive fast track, because an inability to manage others is the main reason for derailment. To act openly to the ideas and opinions in a particular task is also considered highly important in managing others (Sternberg et al. 2000). Managerial tacit knowledge in managing tasks concerns performing specific managerial tasks successfully. An example of managing tasks is knowing how to communicate to others the main point in a presentation (Wagner 1987).

Wagner (1987) extended the scope of managerial tacit knowledge to also include the context and the orientation of tacit knowledge. The context of managerial tacit knowledge refers to whether the knowledge concerns short-term or long-term accomplishments; while the orientation of managerial tacit knowledge refers to whether the knowledge concerns the ideal quality or practicality. A local context is regarding a concern with the short-term accomplishment of a given task, which is limited to the task at hand; a global context, on the other hand, is regarding a



**Fig. 2.7** Wagner's three-dimensional framework of managerial tacit knowledge

concern with long-term accomplishment, which focuses on how the present situation fits into the bigger picture. Managerial tacit knowledge with an idealistic orientation refers to a focus on the ideal quality of an idea; on the other hand, managerial tacit knowledge with a pragmatic orientation refers to a focus on how workable an idea is without regard to its ideal quality. This allows the managerial tacit knowledge framework to be constructed on a three-dimensional basis as illustrated in Fig. 2.7.

#### ***2.4.4 Acquisition of Managerial Tacit Knowledge***

Wagner and Sternberg (1987) contend that there are three mental processes instrumental in the acquisition of managerial tacit knowledge: selective encoding, selective combination, and selective comparison. Selective encoding is the first process. It is used to filter information from the environment. In particular, selective encoding involves separating relevant information in one's experience from information that is irrelevant to one's purposes; selective combination is the second process. It is used to put together the information that is selectively encoded as relevant for one's purposes. This process involves understanding how relevant information interrelates and forms a pattern; the third process is selective comparison. It is used to relate previously known information to new information. This process involves drawing upon one's existing knowledge in order to incorporate new knowledge. Wagner and Sternberg (1987) propose that these three mental processes of acquisition of managerial tacit knowledge should be used interactively in order to maximize one's learning on the job. Managers need to make fairly continual use of all three processes in order to make sense of a new situation and to re-evaluate old situations.

Baumard (1999) holds that managerial tacit knowledge is generated in the intimacy of lived experience. The major source of tacit knowledge is experience and there exist differences between individuals in the level and content of tacit knowledge acquired (Wagner and Sternberg 1987). The differences in the level and content of managerial tacit knowledge can largely be attributed to the different ways in which people learn from experience. This is affected by both the context of the learning environment and the differences in the way individuals prefer to engage in



the learning process. The present study will then investigate the source of differences in the levels of accumulated managerial tacit knowledge from these two perspectives: learning environment and individual learning preferences.

#### **2.4.4.1 Learning Context in the Acquisition of Managerial Tacit Knowledge**

Nonaka (1994) argues that the generation and accumulation of tacit knowledge is determined by the ‘variety’ of an individual’s experience and the individual’s commitment and involvement in the ‘context’ of the situation. Lots of existent research studies point out the differences in learning as the source of differences in the level and content of tacit knowledge. Experience alone, despite exhibiting prominence in relation to the acquisition of tacit knowledge, would not suffice. First of all, the learning process has been highlighted as one important reason why some people are less adept at acquiring knowledge from experience than others and an important part of a learning process is the learning environment. Compared with formal learning environments, Sternberg and Grigorenko (2001) suggest that informal or implicit learning environments, such as learning on an International Assignment, do not adequately support the knowledge acquisition process for some individuals. In informal learning environments, learners have to rely on their own capability to acquire knowledge from experience. Sternberg (1988) contends that formal learning environments support knowledge acquisition by facilitating the process of selective encoding, selective combination, and selective comparison, which are essential features of the learning process for many people. Informal learning environments, on the other hand, often fail to provide these features. Sternberg and Grigorenko (2001) contend that tacit knowledge is context-specific knowledge about what to do in a given situation or class of situations. Tacit knowledge is gained primarily from working on practical problems that are specific to their particular domain. The consequence of drawing on or using one’s tacit knowledge is also likely to be context-dependent because tacit knowledge does not always transfer effectively from one professional context to another (Choo 1998). Tacit knowledge needs to be relevant to be useful.

Moreover, different learning contexts contain different supportive ways for individuals to acquire knowledge. To match the preferred ways of learning demanded by an external environment with that of the individual is likely to improve the acquisition of managerial tacit knowledge (Sternberg et al. 2000; Armstrong and Mahmud 2008). There is widespread evidence to suggest that when learners are involved in environments that are matched with their unique learning styles, they achieve significantly higher learning outcomes (Kolb and Kolb 2005; Armstrong and Mahmud 2008). Conversely, a mismatch between learning style and learning context is likely to impede the process of learning and knowledge acquisition. An individual with a strong orientation toward the converging learning style, for example, would tend to be less focused on people and more concerned with technology and problem solving. They would therefore be less suited to an



interdependent context, such as Chinese business environment, because learning opportunities in an interdependent context would be congruent with the diverging learning style.

#### **2.4.4.2 Individual Learning Preferences in the Acquisition of Managerial Tacit Knowledge**

In addition to the context of the learning environment, individual differences in preferred ways of organizing and processing information and experience are likely to have a profound effect on the acquisition of tacit knowledge. A person's aptitude to learn is another differentiating factor (Wagner and Sternberg 1987). Sternberg et al. (2000) regard tacit knowledge as a subset of procedural knowledge depicted as paths 'Episodic Memory-Procedural Memory' and 'Personal Experience—Procedural Memory'. This knowledge, unsupported by direct instruction, may well lead to a performance advantage for the individual because 'it is likely that some individuals will fail to acquire it' (Sternberg et al. 2000: 117). Individuals differ in the way they perceive, conceptualise, organise, and process information and these differences depend on several attributes unique to the individual. People tend to learn in different ways from their experiences as a result of their pre-established learning structures, which influence the way they perceive, conceptualise, organise, and process information (Zhang 2001). In explaining the differences in the level and content of tacit knowledge across individuals who appear to show similar abilities and experiences, Kolb (1984) and Kolb and Kolb (2005) suggest that it is due to the different learning styles of individuals. Unique attributes of an individual, such as learning style, may account for these differences and this may contribute to the variations in tacit knowledge between different people.

Furthermore, all tacit knowledge is a subset of procedural knowledge and it is, therefore, unconsciously formed with automatic learning outside our field of consciousness. Being automatic and outside the field of consciousness, the acquisition of tacit knowledge depends largely on a person's preferred way of learning. People will usually learn, especially without formal instructions, in their preferred mode of learning, expressed in the notion of learning style. Learning style is believed to represent the interface between cognitive style and the external learning environment, and hence contextualizes individual differences in learning. The concept of style is used as a construct in psychology and is used for studying individual differences in learning and behaviour. Style is believed to constitute a preference to do things, irrespective of their ability to do it (Zhang 2001). Several researchers have explored the role of style in affecting learning outcomes (Zhang 2001). Zhang (2001) contend that styles can change with situations, time, and demands and therefore, it is possible to provide avenues for change to match needs or effectiveness. Therefore, we can propose that differences in learning styles will result in differences in learning outcomes, and consequently in the level of accumulated managerial tacit knowledge. In this study, the researcher will investigate the relationship between western expatriate managers' learning styles and their levels of

accumulated managerial tacit knowledge as well as the effects of learning style transitions on the accumulation of managerial tacit knowledge.

#### ***2.4.5 Managerial Tacit Knowledge and Performance***

Tacit knowledge tests have been found to predict performance and utilise a number of criteria in various domains. Tacit knowledge scores are found to be significantly associated with salary increases (Wagner and Sternberg 1985; Wagner 1987), performance ratings of bank managers (Wagner and Sternberg 1985). Research on tacit knowledge associated with auditors revealed that senior staff had higher levels of managerial tacit knowledge than the novice staff, and the managers with higher levels of tacit knowledge received higher performance evaluations (Tan and Libby 1997). In comparing the predictive validity of tacit knowledge tests and conventional ability tests, Wagner and Sternberg (1990) found that tacit knowledge scores of business executives explained 32 % of the variance in performance on managerial simulation beyond scores on traditional IQ test. In the case of military leaders, tacit knowledge scores accounted for 4–6 % of significance variance in leadership effectiveness beyond scores on tests of verbal intelligence. These studies provided evidence that tacit knowledge caters for variance in performance that is not accounted by traditional tests of abstract, academic intelligence. Similarly, a study conducted by Colonia-Willner (1998) found that bank managers' levels of managerial tacit knowledge significantly predicted an index of managerial skills, whereas psychometric and verbal reasoning did not. In a study conducted by Armstrong and Mahmud (2008), it was found that there is a significant association between tacit knowledge and the innovative performance of a firm.

An important criterion for evaluating the validity of managerial tacit knowledge is an ability to explain individual differences in work performance. In other words, individuals who learn successfully from personal experience will be more likely to be excellent at their work. Furthermore, managerial tacit knowledge as a component of practical intelligence should explain work performance. Sternberg and Wagner (1993) outline several major research findings on the role of managerial tacit knowledge in job performance research. Firstly, managerial tacit knowledge will increase when job experience increases provided that the person uses the experience to acquire and use tacit knowledge. Secondly, managerial tacit knowledge is not significantly correlated to IQ. Thirdly, tacit knowledge was the best single predictor in performance simulations. Sternberg and Wagner (1985) provide three samples of evidence regarding tacit knowledge and real world pursuits: (1) academic psychologists versus graduate and undergraduate students with a major in psychology; (2) business managers versus graduate and undergraduate students with a major in business; (3) local bank managers. They found that tacit knowledge moderately predicts job performance such as salary, performance appraisal ratings, and number of publications in the research.

Moreover, tacit knowledge is difficult to imitate, communicate, and transfer; therefore, it becomes the asset that underlies sustainable competitive advantage. This is because tacit knowledge can become the asset that enables an organisation to remain superior to its competitors. Tacit knowledge is a ‘differential ability’ that is diverse across organisations, exclusive, and imperfectly imitable (Conner 1994). Baumard (1999) argues that organisations normally neglect tacit knowledge. As a result of recognising that tacit knowledge is the source of competitive advantage, the organisation should retain the tacit knowledge of its own employees. Knowledge in the organisation should be readily transferred within the organisation in order for the organisation to be competitive. Knowledge that cannot be spread will remain the property of employees and this will restrict the benefit or value gained by the organisation. However, knowledge that is spread inter-organisation is not regarded as the source of competitive advantage. As a result, the underlying core competency of the firm, organizational tacit knowledge, is the key to competitive advantage and requires effective transmission within the organisation.

#### ***2.4.6 Measuring Managerial Tacit Knowledge***

The three categories of managing self, others, and tasks has become the core feature in the development of the Tacit Knowledge Inventory for Managers (TKIM). Wagner and Sternberg (1986) combined two research methods: the critical-incident technique and the simulation approach, and developed the tacit knowledge inventory for managers. The critical-incident technique requires asking participants to describe several incidents they handled particularly well and several they handled particularly poorly. The simulation approach requires observing participants when they handle tasks that simulate job performance. Wagner and Sternberg’s (1986) approach of developing TKIM differs from one based on the critical-incident technique in that they do not assume that participants can and will relate incidents that are in some way critical. Rather than that, Wagner and Sternberg (1986) asked participants to describe typical situations and possible responses to them, and then adopt a variety of item-discrimination procedures to identify important items statistically. One characteristic that Wagner and Sternberg (1986) shared with the simulation approach is that they resemble the tasks encountered on the job.

Wagner and Sternberg (1985) describe their approach in developing the tacit knowledge inventory for managers (TKIM) as follows. First, they interviewed experienced and highly successful managers by asking them to describe work-related situations/incidents, which they had experienced and had handled either particularly well or poorly (Wagner and Sternberg 1985), incidents that can influence a task’s success or failure allowing identification of competencies required by a particular job. Critical incident technique and work on managerial job competency formed the basis for elicitation of these incidents and identification of work-related situations to use as scenarios (Wagner 1987).

**Table 2.1** List of constructs in TKIM

Question	Construct	Definition	Items
Part A	Managing oneself	Knowledge about self-motivation and self-organizational aspects of performance in work related situation	30
Part B	Managing tasks	Knowledge of how to do specific work related tasks well	30
Part C	Managing others	Knowledge about managing supervision, subordinates or interactions with peers	31

These successful managers or managerial experts were also asked about their responses to the incidents. Wagner and Sternberg (1985) then carefully identified these incidents to determine which of the responses were based on knowledge that was tacit in nature and learned from personal experience, which could not be formally acquired (Sternberg and Grigorenko 2001). Key responses were then identified through item discrimination procedures. They then assembled these scenarios, with each scenario associated with alternative possible responses for dealing with that problem. The situations simulate specific incidents in the workplace, incidents that require use of tacit knowledge in order to solve (Sternberg and Grigorenko 2001). Acting as observable indicators of tacit knowledge, these incidents can help mitigate the problems of articulating tacit knowledge in the respondents. The methodology does not require that individuals articulate their decision processes; it only requires that they rate possible actions to scenarios. The measures developed using this method define and investigate tacit knowledge unique to the management domain. A list of sub-construct and details of the Tacit Knowledge Inventory for Managers (TKIM) are shown in Table 2.1.

## 2.5 Expatriate Learning

Expatriate learning refers to how expatriates learn and develop based on their international assignments. Since international assignments provide intensive environmental change and intercultural experiences, expatriate learning on international assignments becomes an important approach and organizational intervention for manager development, especially in the area of global management ability. This study draws on Kolb's (1984) experiential learning theory (ELT) and cross-cultural research to illustrate a process model of how expatriates learn and develop based on their international assignment experiences.

The research adopts the ELT framework as the basis of an expatriate learning model for three reasons. First, ELT is an adult learning theory which highlights the critical role experience plays in affecting learning and change. This fits quite well with the main characteristic of expatriate learning. Expatriates work and live in an environment that 'forces' them to experience various uncertainties and complexities. These intensive international experiences are expatriates' learning sources and

wealth. Second, ELT emphasizes learning is the interaction between individuals and their environments. This is consistent with the context of expatriate learning. Expatriate learning is built on the interaction between the expatriate and the outside environment during his/her international assignment. Third, ELT emphasizes changes in learning. This fits well with the developmental objective of expatriate assignments. Expatriates learn from their international assignment experiences to develop global management ability and become qualified global managers. They recreate themselves in response to external changes to gain a new appreciation of the world. Therefore, this research proposes that experiential learning theory (ELT) is a robust and effective lens through which to view expatriate learning and development.

### ***2.5.1 Expatriate Learning Process***

Expatriate learning is a continuous process in a dynamic cycle, which consists of every learning experience during the international assignment. This study integrates four streams of research: international assignment and cross-cultural research, cognitive dissonance studies, knowledge acquisition and management research, and experiential learning theory (ELT), to propose that expatriate learning processes can be portrayed as four learning phases in a dynamic learning cycle based on ELT. These four learning phases are (1) exposure to diversity and dissonance experience (concrete experience), (2) self-reflection (reflective observation), (3) integration across diverse cultures and markets (abstract conceptualization), and (4) modification and self-development (active experimentation). The researcher will now elaborate further on these four phases.

#### **2.5.1.1 Exposure to Diversity and Dissonance Experience**

Exposure to diversity and dissonance experience is the first phase on the expatriate learning cycle. Expatriates work and live in cross-cultural environments that are full of novelties and diversities (Mendenhall and Oddou 1985; Shaffer et al. 2006). In order to successfully complete their international assignments, they need to actively learn different cultural and business norms as well as develop positive contacts with host nationals in the host country. They have to learn and execute local appropriate behaviours to reduce adaptive stress. As a result, expatriates will experience several cross-cultural and global-local dissonances. Some negative arousal and discomfort feelings will then arise during international assignments (Maertz Jr. et al. 2004).

Scher and Cooper (1989) describe that dissonance is aroused whenever behaviour is inconsistent with societal normative standards for competent or moral behaviour, creating aversive consequences. In their model, these societal standards are internalized or otherwise used as evaluative standards in judging one's own behaviour. Further, the dissonance is motivational in that it impels the individual to

attempt to reduce and eliminate it (Maertz Jr. et al. 2004). During international assignments, expatriates undergo two primary kinds of dissonance: one is cultural dissonance due to cultural and national diversity and the other is strategic dissonance due to global integration and local responsiveness. Maertz Jr. et al. (2004) defined cultural dissonance as: anticipating or currently perceiving inconsistencies between one's behaviours, executed or condoned in order to conform to the host culture situation, and one's VABNs (values, attitudes, beliefs, and behavioural norms). On the other hand, strategic dissonance refers to: managing complex operations and integrating geographically distant and strategically diverse businesses while simultaneously responding to local conditions.

### **2.5.1.2 Self-reflection**

After expatriates seek and grasp every concrete international experience, they move on to the second phase of the expatriate learning cycle: self-reflection or articulation of current mindsets. Our current mindsets shape our observations and interpretations of the world around us, which in turn affect whether or not our mindsets change or remain unaltered. Unless this iterative process allows for new learning, it is easy to get trapped in our old mental models (Nonaka 1998). A powerful way to reduce the likelihood of this entrapment is to articulate one's current mindsets.

Reflective observation is the process that helps people to describe the situation objectively and cultivate an articulation of own current mindsets (Kolb 1984). This phase of expatriate learning cycle occurs when expatriates think about experiences and reflect critically on their assumptions and beliefs. Doing so requires accepting the possibility that our view of the world is just one of many alternative interpretations of reality and allows us to consider different perspectives or views of the situation. When expatriates reflect on their international experiences by gathering and analyzing information, it becomes possible to change the mindsets that guide their future actions. Maertz Jr. et al. (2004) support this phase of expatriate learning from a cognitive perspective. They claimed that expatriates will use different kinds of cognitive dissonance reduction methods to maintain the self-concept against threat from cognitive dissonance experiences during international assignments. Expatriates who regularly adopt perceptual modification, which search for and reflect on the deeper attribution and empathetic understanding, as the method of cognitive dissonance reduction are supposed to be better at achieving integrative development.

### **2.5.1.3 Integration Across Diverse Cultures and Markets**

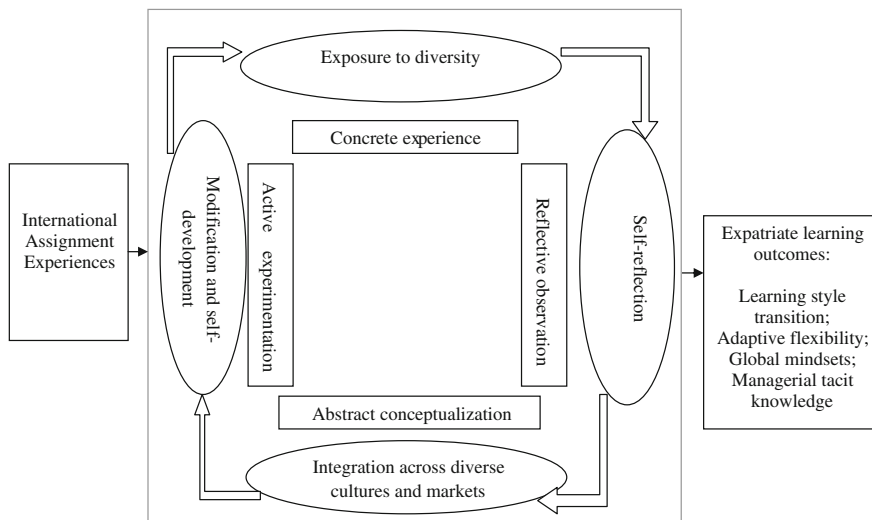
After expatriates reflect on their international experiences by gathering and analyzing information, they move on to the third phase of the expatriate learning cycle: integration across diverse cultures and markets. The third stage emphasizes the importance of building general theories using scientific, as opposed to intuitive,

approaches. This stage requires learners to distil their reflections into more general concepts that can guide their future actions, and emphasizes thinking, rather than feeling (Kolb 1984). Research in cognitive psychology has shown that experts conceptualize problems more efficiently and effectively because they have more organized knowledge structures with stronger linkages among domain-related concepts. In contrast, novices are less efficient because their knowledge representations tend to be based on salient surface elements. In addition, novices are often less effective in their knowledge acquisition because of their lack of pre-organized schemas that provides efficient classification of knowledge. Integration across diverse cultures and markets enable expatriates to translate their insights from a particular experience into more general concepts and interpretations that can be applied to future challenges and other cultural and business contexts. Integrating across diverse cultures and markets, expatriates will have more organized and elaborated knowledge structures that facilitate their information processing as well as identification of relevant principles.

Hocking et al. (2007) proposed that expatriates can develop integrative capacity to become qualified global managers through a cumulative understanding of both corporate practice and local environment contexts during international assignments. They claimed that integrative capacity can be cultivated through a two-phase process of cross-border knowledge adaptation. The first phase requires that expatriate managers funnel corporate knowledge gained from their former experience and modify it to fit their specific host-country environment; the second phase involves a reinterpretation of locally accessed knowledge and its subsequent expansion to fit a broader corporate contextual framework. In other words, the conversion of context-specific knowledge into context-generic knowledge enriches expatriates' integrative capacity, which can enable expatriates' next international assignment experience to be more readily understood and assimilated. Levy et al. (2007) argued that expatriates with higher cognitive complexity will be more accurate and effective in developing general ideas and conceptual interpretations of culture based on their international assignments.

#### **2.5.1.4 Modification and Self-development**

After expatriates integrate reflections into more general concepts and interpretations across diverse cultures and markets, they move on to the fourth phase of the expatriate learning cycle: test and modification of changed mindsets and further development of self. This stage both completes the cycle of expatriate learning and ensures that the cycle begins anew by assisting the creation of new experiences. During this phase of the expatriate learning cycle, expatriates may consciously plan for opportunities to verify their insights (for example, whether an authoritarian leadership style or a participative leadership style is more effective in this new environment) and then carry out their plan (give different directions to subordinates). Expatriates therefore gain experiences based on real interactions with others



**Fig. 2.8** Expatriate learning process model

and then gather self-correcting and self-development. Ng et al. (2009) claimed that active experimentation facilitates development of a wide range of flexible leadership behaviours for expatriate managers. Figure 2.8 illustrates the expatriate learning process model. In Fig. 2.8, expatriates learn in a dynamic cycle based on their international assignment experiences and then obtain several learning outcomes. Expatriate learning outcomes will be discussed respectively in Sect. 2.5.2.

## 2.5.2 Expatriate Learning Outcomes

Learning, defined as the process of creating knowledge based on the transformation of experience, is a multifaceted construct with implications for multiple learning outcomes. In thinking about implications of international assignment experiences on expatriate learning, this study identifies expatriate learning outcomes in four aspects: learning style transition, managerial tacit knowledge, adaptive flexibility, and global mindsets.

### 2.5.2.1 Learning Style Transition

(a) Concrete experience as primary learning mode for expatriate learning

Kolb (1984) proposed that individuals with an orientation toward concrete experience learning mode are open to new experiences, emphasize feeling rather than



thinking, and function well in unstructured situations. Yamazaki and Kayes (2004) conducted a literature review on expatriate adaptation and suggested that concrete experience is a primary learning skill for successful expatriation because it is related to valuing another culture and to developing positive interactions with the host nationals. Yamazaki and Kayes (2007) conducted an exploratory study of how Japanese expatriates adapt to working in the United States over time. Their research suggested that Japanese managers become more concrete in their learning styles over time spent in the USA. They also suggested that expatriate adaptation requires learning in the concrete mode above the other three learning modes and expatriates as foreign nationals in the host country require more concrete learning than the host nationals. Ng et al. (2009) proposed that expatriates with a preference for concrete experience learning mode will actively seek cross-cultural experiences during their international assignments, which is important for leaders to translate their international assignment experiences into learning outcomes that are critical for global leadership development. Shaffer et al. (2006) suggested that expatriates with a learning goal orientation will actively seek intercultural experiences during their international assignments.

Western expatriates confront huge cultural and business differences in China. It is important for them to value Chinese culture and actively build up positive contacts with local Chinese people (colleagues inside their organization, colleagues outside their organization, friends in their daily life and so on) to gain successful expatriation. Expatriates with longer international assignment tenures have greater degrees of cross-cultural involvement, thus improving the amount and quality of concrete international experiences they could learn from. Li and Scullion (2010) argued that local knowledge in emerging markets, such as China, has a significant special nature: undiffused, highly tacit, and fast-changing, and that very nature determines the need for intensive socialized activities in these markets. Hocking et al. (2007) emphasize that local knowledge access is a significant contributor to expatriate learning. Therefore, this study proposes a second hypothesis that the concrete experience mode of western expatriate learning is positively related to the length of international assignment tenure in China.

*Hypothesis 2a* The longer western expatriate managers have engaged in their International assignments in China, the more they will show their learning preferences for concrete experience over abstract conceptualization.

(b) Cross-cultural impacts on learning styles

As discussed in section in 2.2.2, culture is an important environmental characteristic that has a great influence on learning styles and learning styles will change according to the environmental change. Moreover, the longer the time that individuals have spent in a certain environment that accentuates a particular learning style, the more they tend to specialize even more in this learning style (Kolb 1984; Hayes and Allinson 1988).

This study is based on the assumption that typical Chinese learning styles have a preference for reflective observation over active experimentation, which is different from Westerners (as discussed in 2.2.2). Auyeung and Sands (1996) postulated that students from Chinese cultures are significantly more reflective than are Western students based on their research of testing the relationship between individualism and collectivism, RO and AE learning modes. Western expatriates tend to differ in the degree of learning orientation that is accentuated in China. The environmental differences may cause Western expatriates' learning styles to be shifted towards the ones matched with the demands produced by Chinese business environments. The transition of learning styles will occur in accordance with the amount of continuous time the Western expatriates have spent in China. Therefore, this study proposes the second hypothesis that the reflective observation mode of Western expatriate learning is positively related to the length of international assignment tenure in China.

*Hypothesis 2b* The longer western expatriate managers have engaged in their International assignments in China, the more they will show their learning preferences for reflective observation over active experimentation.

*Hypothesis 2c* The longer western expatriate managers have engaged in their International assignments in China, the more balancing their learning styles will be.

### 2.5.2.2 Managerial Tacit Knowledge

Nonaka (1994) argues that the generation and accumulation of tacit knowledge is determined by the 'variety' of an individual's experiences and the individual's commitment and involvement in the 'context' of the situation (pp. 21–22). Sternberg et al. (2000) refer to tacit knowledge as experience based on the knowledge required for solving practical problems (pp. 104–105). Baumard (1999) argues that managerial tacit knowledge is generated in the intimacy of lived experience.

The growing emphasis on international assignment experiential approaches to manager development can be attributed to the importance accrued to international experience. Existent research demonstrates that firms led by CEOs with international experience perform better financially. In addition, global managers themselves find international assignments beneficial for their personal and professional development. In research conducted by Dickmann and Doherty (2008), most managers reported that living and working abroad was the most powerful experience in developing their career capital. The role of experience in the acquisition of tacit knowledge has been widely acknowledged within the literature on tacit knowledge. However, previous studies have revealed mixed results on the relationship between length of experience and tacit knowledge (Armstrong and Mahmud 2008; Colonia-Willner 1998; Wagner 1987; Wagner and Sternberg 1985,

1986). It has been argued that learning from experience results in a form of knowledge that is tacit in nature (Nonaka and Takeuchi 1995; Nonaka 1994). If learning from experience should lead to the accumulation of tacit knowledge, therefore, it follows that the longer the length of experience a person has, the more the opportunity they have to learn from it, resulting in a higher level of tacit knowledge acquired. This gives rise to the following hypotheses that there is a significant relationship between the lengths of western expatriate managers' international assignment experience and their levels of accumulated managerial tacit knowledge. In this study, the researcher investigates western expatriate managers' accumulation of managerial tacit knowledge in two aspects: managing self and managing others. The study proposes the hypotheses regarding how Western expatriate managers accumulate managerial tacit knowledge during their international assignments.

*Hypothesis 3a* The longer western expatriate managers have engaged in their International assignments in China, the greater their levels of accumulated managerial tacit knowledge in managing self.

*Hypothesis 3b* The longer western expatriate managers have engaged in their International assignments in China, the greater their levels of accumulated managerial tacit knowledge in managing others.

### 2.5.2.3 Adaptive Flexibility

As discussed in Sect. 2.3.4, adaptive flexibility describes how an individual learns to adapt to changing circumstances over time and it is an indicator of the level of individual development. Thus, if individuals show systematic variability in their response to different environmental demands, we can infer they own higher levels of adaptive flexibility and individual development. Yamazaki and Kayes (2007) proposed that expatriates use different modes of adaptation and develop greater adaptive flexibility to adapt to a new culture. International assignments are full of challenges and uncertainties, especially in a host country with significant diversities. The complex and ever-changing global environment requires international managers to be flexible. As a result, expatriates need, and are forced, to develop their adaptive flexibility to obtain successful expatriation. Therefore, this study proposes the hypothesis that expatriate's adaptive flexibility is positively related to the length of international assignment tenure.

*Hypothesis 4* Duration of western expatriate managers' engagement in international assignments in China will positively influence their adjustment to the host culture via adaptive flexibility.

### 2.5.2.4 Global Mindsets

Expatriates on international assignments are expected to broaden the horizon and foster global mindsets through working and living in a distinct culture and system. A number of disciplines have attempted to define global mindset, resulting in lots of definitions, which is the mark of a relatively young research field. The vast majority of existent studies conceptualize global mindsets in relation to two salient aspects of the global environment: (1) cultural and national diversity and/or (2) strategic variety and complexity associated with globalization (Levy et al. 2007).

#### (a) The definition of global mindset

The core properties of global mindsets are described in three relatively distinct perspectives: attitudinal perspective, behavioural perspective, and cognitive perspective (Levy et al. 2007). Studies within the attitudinal perspective describe global mindsets using terms such as ‘attitude’, ‘state of mind’, and ‘orientation’. Perlmutter’s (1969) ground-breaking tripartite typology of managerial mindsets in MNCs serves as a conceptual anchor for the attitudinal perspective. Perlmutter and his colleagues (1969) offer a typology of MNCs that is explicitly based on the mindsets of senior executives. He originally distinguished among three primary attitudes or states of mind toward managing a multinational enterprise: ethnocentric, polycentric, and geocentric. Perlmutter’s notion of geocentrism serves as an underlying construct for many of the contemporary conceptualizations of global mindsets that focus on the challenge of overcoming ingrained ethnocentrism and transcending nationally entrenched perceptions (Maznevski and Lane 2004). For example, Bouquet (2005) defines global mindsets as attention to global strategic issues, arguing that attention is the core element and a primary manifestation of global mindsets. He finds empirical support for the hypothesized relationships that the firm’s decision environment influences attention structures, which, in turn, affect top management team (TMT) attention to global strategic issues. Studies within the behavioural perspective define global mindsets in behavioural or competency-related ability. Beechler and Javidan (2007) defined the critical components of global mindsets as intellectual capital, psychological capital, and social capital. Even though all of these three capitals are regarding ability and competence, Beechler and Javidan (2007) mentioned that cognitive attributes are also in the properties of global mindsets.

Studies within the cognitive perspective define the core properties of global mindsets in cognitive structure and cognitive complexity. Most of them conceptualize global mindsets both in the context of cultural and strategic diversity (Levy et al. 2007). Rhinesmith (1992) described global mindsets as entailing high levels of cognitive capabilities, especially scanning and information-processing capabilities, as well as the ability to balance competing realities and demands and to appreciate cultural diversity. Govindarajan and Gupta (2001) conceptualized global mindsets as a knowledge structure characterized by both high differentiation and high integration. Arora et al. (2004) described global mindsets as the tension between ‘thinking globally’ and ‘acting locally’. Arora et al. (2004) found in their empirical

study of 65 managers in the textile industry that managers are better in conceptualization (thinking globally) than in contextualization (acting locally). Levy et al. (2007) emphasized that cognitive properties are the most fundamental building blocks of global mindsets. Elaborating on their definition, global mindsets are characterized by three complementary aspects: an openness to and awareness of multiple spheres of meaning and action, complex representation and articulation of cultural and strategic dynamics, and mediation and integration of ideals and actions oriented both to the global and local.

Obviously, this diversity of terms and perspectives on global mindsets presents a considerable challenge for theoretical integration in this field. This study agrees with Levy et al.'s (2007) perspective that cognitive properties are the most fundamental components of global mindsets, and emphasizes that cognitive properties of global mindsets refer to individual higher level of cognitive structure and cognitive complexity.

(b) Expatriates cultivate global mindsets during international assignments

Expatriate assignments are the most common ways that MNCs adopt to develop managers' global mindsets (Govindarajan and Gupta 2001; Gupta and Govindarajan 2002; Levy et al. 2007). Govindarajan and Gupta (2001) proposed that expatriation can be used to cultivate managers' global mindsets. Arora et al. (2004) presented evidence to suggest that international assignment experience has a statistically significant impact on managers' global mindsets. Nummela et al. (2004) through their empirical findings offer tangential evidence on the hypothesis that top management team's (TMT) international work experience is positively related to global mindsets.

### 2.5.2.5 The Relationships Among Expatriate Learning Outcomes

(a) Learning style and managerial tacit knowledge

Tacit knowledge is believed to be a product of learning from experience that affects performance in real-world settings (Nonaka and Takeuchi 1995). It is recognised as an essential element of expertise and has been shown to be important for success of individuals (Nestor-Baker 1999) and for competitive advantage in organisations (Prahalad and Hamel 1990). Previous authors (e.g. Baumard 1999) attribute the origin of the construct to the science philosopher Polanyi who captured the meaning of tacit knowledge in his famous remark "we can know more than we can tell" (1966, p. 4). Managerial tacit knowledge is believed to be generated in the intimacy of lived personal experience (Baumard 1999; Sternberg and Horvath 1999), guides actions and decisions without being in our field of consciousness (Anderson 1983) and is believed to be an essential factor that distinguishes successful managers from others (Armstrong and Mahmud 2008; Argyris 1999; Wager and Sternberg 1987). Whilst studies have consistently demonstrated differences in level and content of tacit knowledge between expert and novice groups (Wagner et al. 1999; Patel et al.

1999; Tan and Libby 1997; Nestor-Baker 1999; Williams 1991), few have accounted for why or how these differences occur. We are informed, however, that differences can be attributed to the context of the learning environment and differences in the way individuals prefer to engage in the learning process (Sternberg et al. 2000).

Peoples national culture (Yamazaki 2005; Yamazaki and Kayes 2004), work environment (Choo 1998; Sternberg and Grigorenko 2001) and individual learning styles (Kolb and Kolb 2005; Armstrong and Mahmud 2008) have all been shown to influence the acquisition of tacit knowledge. When peoples learning styles are matched with their work environment it has been demonstrated that they achieve significantly more learning outcomes in an educational context (Dunn and Griggs 2003) and higher levels of managerial tacit knowledge in a management context (Armstrong and Mahmud 2008). Conversely, a mismatch between learning style and work context is likely to impede the process of learning and knowledge acquisition. Elaborating further on this person-culture congruence theory, individuals with a strong orientation toward the converging learning style would rather deal with technical tasks and problems than with social and interpersonal issues (Kolb 1984). This style is more suited to Yamazaki's (2005) definition of a low context culture (e.g. USA). This is opposite to the diverging learning style associated with a preference for working in groups to gather information, listening with an open mind, and receiving personalised feedback (Kolb 1984). This style is more suited to Yamazaki's (2005) definition of a high context culture (e.g. China). This leads to the following hypothesis:

*Hypothesis 5a* Western expatriate managers' learning styles will differentiate between levels of managerial tacit knowledge accumulated during their international assignments in China.

The category of managerial tacit knowledge labelled managing others (Wagner 1987) refers to knowledge about interacting and communicating effectively with one's subordinates, peers and superiors. Success in interpersonal interactions and communications of this nature is consistent with characteristics associated with the CE mode of grasping experience according to Kolb's (1984) experiential learning theory (ELT). ELT suggests that people with CE learning preferences: have broad cultural interests; are interested in people; rely heavily on people for information rather than on their own technical abilities to solve problems. They have also been described as being more adept at establishing personal relationships, communicating effectively, and helping others (Kolb et al. 2001). Yamazaki (2005) contends that in high context cultures (e.g. China) people rely on CE abilities to acquire tacit knowledge that serves to distinguish covert cues for effective communication and successful interpersonal relationships. This leads to the following hypothesis:

*Hypothesis 5b* Western expatriate managers with learning preferences for concrete experience over abstract conceptualisation accumulate higher levels of managerial tacit knowledge related to managing others during their international assignments in China.

The category of managerial tacit knowledge labelled managing self (Wagner 1987) refers to knowledge about self-motivational and self-organisational aspects of managerial performance. Acquisition of tacit knowledge associated with self depends on the ability to reflect on one's own behaviours in order to understand a wide range of information, see things from different perspectives, and develop an understanding of internal incompatibilities between specific behaviours and expected performance (Sternberg and Grigorenko 2001; Sternberg et al. 2000). Success in reflecting on one's own behaviours of this nature is consistent with characteristics associated with the RO mode of transforming experience according to Kolb's (1984) experiential learning theory. ELT suggests that people with RO learning preferences: learn by reflecting, making careful observations before making judgements; look inward for meaning and view things from different perspectives. In Yamazaki's (2005) definition of high context cultures (e.g. China), it has been suggested that people rely on Reflective Observation abilities for transforming experiences (Kolb and Kolb 2005; Yamazaki 2005; Fridland 2002). This leads to the following hypothesis:

*Hypothesis 5c* Western expatriate managers with learning preferences for reflective observation over active experimentation accumulate higher levels of managerial tacit knowledge related to managing self during their international assignments in China.

## 2. Learning style and adaptive flexibility

Kolb (1984) hypothesised that learning styles are determined by the interplay between people and their environments. As a consequence learning styles have been shown to differ from one culture to another (Yamazaki 2005), and expatriate managers' learning styles have been shown to change over a period of time in response to cultural demands (Yamazaki and Kayes 2007). Propensity for changes of this nature, however, will depend on the extent to which individuals are able to learn to adapt to changing circumstances over time—otherwise known as 'adaptive flexibility' (Boyatzis and Kolb 1993; Kolb 1984).

Flexibility of a person's learning style is related to the degree to which one integrates the dual dialectics of the learning process—conceptualizing/experiencing (AC-CE) and acting/reflecting (AE-OR) (Kolb 1984). Kolb (1984) hypothesised that individuals with balanced learning profiles on these dimensions will be more sophisticated (adaptively flexible) learners than those with specialised learning styles. Mainemelis et al. (2002) provided empirical evidence of this and concluded that 'the more balanced individuals are on the dual dialectics of learning, the more they will show adaptive flexibility' (p3). Whilst they confirmed this for both dimensions of the learning process, their results were stronger for the conceptualizing/experiencing dimension than the acting/reflecting dimension. Adaptive flexibility then, refers to the degree to which one changes learning style to manage competing demands and deal with environmental complexity. This leads to the following hypotheses:

*Hypothesis 6a* Western expatriate managers with learning preference for concrete experience over abstract conceptualization develop higher levels of adaptive flexibility during their International assignments in China.

*Hypothesis 6b* Western expatriate managers with learning preference for reflective observation over active experimentation develop higher levels of adaptive flexibility during their International assignments in China.

*Hypothesis 6c* Western expatriate managers with balanced learning styles demonstrate higher levels of adaptive flexibility during their International assignments in China.

### ***2.5.3 Expatriate Learning and Expatriate Adjustment***

Understanding how expatriates adapt to new cultural circumstances appears to be very important for MNCs and their expatriates. This study will contribute to such understanding in light of learning perspectives. The successful adaptation of expatriates hinges on how well they learn from experiences in foreign operations (Ratiu 1983; Ng et al. 2009). Expatriates' learning from experience produces acquisition of essential skills and knowledge demanded for effective managerial behaviour in numerous transitional situations. According to the qualitative study of Ratiu (1983), expatriates' way of learning from cross-cultural experiences results in discrimination between ordinary managers and outstanding managers who perform well in intercultural environments. Shaffer et al. (2003) contend that well-adjusted expatriates will have greater reserves of personal resources (like time, effort, and emotional investment) available to spend on the behaviours that facilitate their job performance and learning. Selmer (2006) contends that there is a positive relationship between an expatriate's learning ability and his/her extent of adjustment. If an individual cannot learn how to adjust in a novel cultural context, relevant pieces of information are likely to be unidentified or their importance overlooked. On the other hand, well-adjusted expatriates, attuned to the local socio-cultural environment, may be able to identify relevant knowledge and correctly assess its importance for various business decisions (Selmer 2006). Furuya et al. (2009) contend that learning on international assignments is influenced directly by three antecedent factors: organizational support from the firm, intercultural personality characteristics of the expatriate, and the self-adjustment encountered by the expatriate during the overseas experience. They propose that international assignments provide great opportunity for expatriate learning and the nature of the assignment given and how it is framed within the organization context will affect what is learned. The organization's attitude toward its international operations (e.g., the company maintains a positive attitude about being a global company; the company emphasizes the



importance of global work experience) may broadly frame how managers view the expatriate assignment and what they are expected to take away from such assignments. Furuya et al. (2009) examined 305 repatriates, who had been recently repatriated to the home office after a 1 to 2 year first-time overseas assignment, and they found a positive relationship between expatriate self-adjustment and their global management competency learning. They further propose that expatriate learning would lead to heightened employee job motivation and to higher levels of general work performance.

Yamazaki's (2005) recent theoretical study about expatriate adaptation argues that there may be different learning strategies for effective adaptation in accordance with their home countries. Hocking et al. (2004)' empirical studies regarding the differentials between assignment purposes and assignment outcomes argues that expatriate learning is an inevitable emergent outcome of the expatriate knowledge transfer process, which indicates that expatriates place a greater emphasis than the company on the relevance of their self-learning as an assignment purpose. These studies have directed our attention to the importance of experiential learning for the successful adaptation and high performance of expatriates. While the great importance of this area of expatriate study is beginning to be understood, we do not know empirically much about what kinds of learning strategies expatriates tend to adopt for cross-cultural adaptation in intercultural business contexts. Though it is commonly held that expatriates engage in extensive learning while on assignment, there is scant empirical research on what they have learned or on what factors may affect their learning (Furuya et al. 2009).

From the preceding discussions, it can be postulated that western expatriate managers with learning preferences that matched with the host culture will adapt better in the host country; adaptive flexibility will be an important component of successful cross- cultural adjustment; and levels of managerial tacit knowledge accumulated in the host culture will positively influence their adjustment to international assignments in the host culture, which points to a mediation effect of managerial tacit knowledge. Thus, the present research hypothesises the following:

*Hypothesis 7a* Western expatriate managers with strong learning preferences for concrete experience will adjust better to their international assignment in China than those with a strong learning preference for abstract conceptualization.

*Hypothesis 7b* Western expatriate managers with strong learning preferences for reflective observation will adjust better to their international assignment in China than those with a strong learning preference for active experimentation.

*Hypothesis 8* Western expatriate managers' who arrive with higher levels of adaptive flexibility will adjust better to their international assignment in China.

*Hypothesis 9* Learning styles will positively influence expatriate managers' adjustment to the host culture via levels of accumulated managerial tacit knowledge.

2.6 Research Framework and Hypotheses

This section integrates all the hypotheses and the exploratory question derived from the above literature review. Whole seventeen research hypotheses concern five components as follows: the length of international assignment tenure in the host country, learning style, adaptive flexibility, managerial tacit knowledge, and expatriate adjustment in the host country. Theoretical connections among these five components are organized structurally in a model as depicted in Fig. 2.9. In this model, the arrow shows the influential direction between the components.

- All seventeen research hypotheses are integrated below:
- Hypothesis 1: Duration of expatriate managers’ international experiences in the host culture will positively influence their adjustment to the current international assignment.
  - Hypothesis 2a: The longer western expatriate managers have engaged in their International assignments in China, the more they will show their learning preferences for concrete experience over abstract conceptualization.
  - Hypothesis 2b: The longer western expatriate managers have engaged in their International assignments in China, the more they will show their learning preferences for reflective observation over active experimentation.
  - Hypothesis 2c: The longer western expatriate managers have engaged in their International assignments in China, the more balancing their learning styles will be.
  - Hypothesis 3a: The longer western expatriate managers have engaged in their International assignments in China, the greater their levels of accumulated managerial tacit knowledge in managing self.

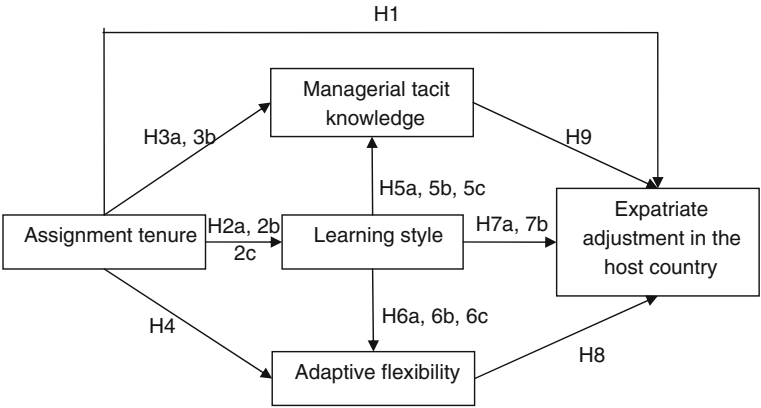


Fig. 2.9 Research framework

- Hypothesis 3b: The longer western expatriate managers have engaged in their International assignments in China, the greater their levels of accumulated managerial tacit knowledge in managing others.
- Hypothesis 4: Duration of western expatriate managers' engagement in international assignments in China will positively influence their adjustment to the host culture via adaptive flexibility.
- Hypothesis 5a: Western expatriate managers' learning styles will differentiate between levels of managerial tacit knowledge accumulated during their international assignments in China.
- Hypothesis 5b: Western expatriate managers with learning preference for reflective observation over active experimentation accumulate greater levels of managerial tacit knowledge related to managing self during their International assignments in China.
- Hypothesis 5c: Western expatriate managers with learning preference for concrete experience over abstract conceptualization accumulate greater levels of managerial tacit knowledge related to managing others during their International assignments in China.
- Hypothesis 6a: Western expatriate managers with learning preference for concrete experience over abstract conceptualization develop higher levels of adaptive flexibility during their International assignments in China.
- Hypothesis 6b: Western expatriate managers with learning preference for reflective observation over active experimentation develop higher levels of adaptive flexibility during their International assignments in China.
- Hypothesis 6c: Western expatriate managers with balanced learning styles demonstrate higher levels of adaptive flexibility during their International assignments in China.
- Hypothesis 7a: Western expatriate managers with strong learning preferences for concrete experience will adjust better to their international assignment in China than those with a strong learning preference for abstract conceptualization.
- Hypothesis 7b: Western expatriate managers with strong learning preferences for reflective observation will adjust better to their international assignment in China than those with a strong learning preference for active experimentation.
- Hypothesis 8: Western expatriate managers' who arrive with higher levels of adaptive flexibility will adjust better to their international assignment in China.
- Hypothesis 9: Learning styles will positively influence expatriate managers' adjustment to the host culture via levels of accumulated managerial tacit knowledge.

One exploratory question is described as follows:

Exploratory Question 1: To what extent do Western expatriate managers differ from host Chinese managers with regard to learning styles and levels of accumulated managerial tacit knowledge?

**Table 2.2** Depiction of these parallelisms between research questions and hypotheses

Hypotheses	Research question	Derived section
H1	Research question (1)	<a href="#">2.2.3</a>
H2a, H2b, H2c	Research question (2)	<a href="#">2.5.2.1</a>
H3a, H3b	Research question (2)	<a href="#">2.5.2.2</a>
H4	Research question (2)	<a href="#">2.5.2.3</a>
H5a, H5b, H5c	Research question (3)	<a href="#">2.5.2.5</a>
H6a, H6b, H6c	Research question (3)	<a href="#">2.5.2.5</a>
H7a, H7b	Research question (1)	<a href="#">2.5.3</a>
H8	Research question (1)	<a href="#">2.5.3</a>
H9	Research question (1)	<a href="#">2.5.3</a>

These hypotheses and the exploratory question are designed to answer the three research questions discussed in Chap. 1: (1) How do Western expatriate managers adapt when working in China? (2) What do Western expatriate managers learn from their international assignments in China? (3) How do Western expatriate managers learn from their international assignments in China? Table 2.2 depicts the parallelisms between research questions and hypotheses.

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