

AUSTRALIAN EXPATRIATES IN SHANGHAI: GENERATION Y EMERGES

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Introduction

In tandem with rapid changes in the globalized business world, the characteristics of those who constitute the expatriate workforce are also changing. The extant expatriate literature primarily focuses on the variables associated with the success or failure of international assignments, with a view to improving expatriate adaptation and thereby reducing the financial and personal costs associated with failed assignments. This paper presents a fragment of data from recent research focusing on Australian expatriates working for foreign organizations in Shanghai. The findings reveal that the conventional image of an expatriate, as a monolingual, middle aged senior manager transferred with his family by his multinational employer for a pre-determined period of time, may no longer be typical. Nowadays, expatriates are more likely to be young, single, bilingual, self-imposed sojourners, who have relocated themselves in another country for an indefinite time period. These young professionals are members of generation Y; self-focused, well educated and well prepared for an intercultural existence within a cross-cultural context. Appointed to lower or middle management positions, often for a small to medium wholly owned foreign enterprise, they change jobs frequently to progress their careers in an environment short of skills and talent but full of opportunities.

This paper will first review the expatriate literature to identify major themes and concerns. It will then briefly overview the research methodology and data collection associated with a series of semi-structured interviews conducted with Australian expatriate managers working in Shanghai. Following this, biographical interview data will be presented and discussed in relation to expatriate sociocultural adjustment and intercultural communication adaptation. The paper will conclude with an acknowledgement of the limitations of the study and suggestions for future research directions.

Review of Expatriation Literature

Expatriation is an amorphous concept, used within the international management literature to refer to the process whereby individuals are temporarily relocated by their organizations to live and work in a country which is not their own (Al Ariss & Özbilgin, 2010, p. 276). Traditionally the 'expatriate' is sent from their home country on an international assignment (IA) to live and work in another country by a multinational corporation (MNC) (Richardson & Mallon, 2005). Expatriate assignments typically involve relocation of the entire family and last for between one and five years (Mercer, 2008). During recent decades the expatriate manager is credited as having played a central role in the evolution of global organizations and a global workforce (Harvey, Speier, & Novicevic, 1999, p. 459).

Reasons for Expatriation

Global MNCs send expatriates on international assignments (IAs) for a variety of reasons. These include to staff positions unable to be filled by suitably qualified or experienced local managers, to develop managers' capabilities via international experience, to maintain control of the foreign subsidiary (Edstrom & Galbraith, 1977), 'to control their individual operations, to co-ordinate and

integrate their operations worldwide, and to transfer knowledge and organizational practices across units' (Suutari, 2003, p. 188). It has been demonstrated that expatriates are necessary for successful overseas subsidiaries (Björkman, Budhwar, Smale, & Sumelius, 2008), for they are an integral component of staffing strategy for MNC's (Thite, Srinivasan, Harvey, & Valk, 2009, p. 269).

There is evidence that organizations have continued to invest in IAs and empirical evidence of the increased use of expatriate employees until at least 2008 (Bonache, Brewster, Suutari, & De Saa, 2010, pp. 263-264). According to one report, from 2005 to 2008 IA numbers increased by almost 90 percent with 47 percent of surveyed companies reporting increased deployment of traditional expatriates and 38 percent reporting an increase use of global nomads (Mercer, 2008).

For the past three decades the expatriation literature has been preoccupied with three inter-related sub-topics. These are: 1. Selection, training and performance; 2. Types of adjustment (work, interaction, general); and 3. Predictors of adjustment. All three sub-topics relate to the unifying goal of reducing IA failure and maximizing success. It is therefore relevant to examine the extant literature in relation to these.

Selection

Assignment presumes selection, so selection criteria must be comprehensive as they have a strong impact on performance (Claus, Lungu, & Bhattacharjee, 2011, p. 259). In a seminal early study, Tung's findings suggest that the factors crucial to success include technical competence, personality traits and relational abilities, environmental variables, and family situation (1981, p. 69). She recommends that selectors adopt a more holistic, contingency approach which considers the job, environmental variables, candidate willingness to live and work abroad and the availability of suitable host country of workers (Tung, 1981, pp. 71-72). Tung's ten key selection criteria are included in Figure 1 and have proven remarkably resilient and relevant, having been utilized repeatedly within separate empirical investigations. One study extracted them for ranking by the managers of 60 leading MNCs (Stone, 1991). A more recent review of the expatriate selection literature recommends combining her criteria with the key personality characteristics of extroversion, agreeableness, conscientiousness, emotional stability, and openness and intellect for the purpose of expatriate selection. (L.-Y. Lee & Croker, 2006, p. 1189). A very recent study extends this broad and comprehensive approach to selection, advising that any instrument used to select the 'ideal' expatriate 'should not only focus on the big five personality dimensions of extraversion, emotional stability, conscientiousness, agreeableness and openness' (Claus, et al., 2011, p. 253), but should also consider 'local language ability, cultural sensitivity, cultural flexibility, social adaptability, ego strength, interpersonal interest, tolerance for ambiguity, ethnocentrism, task leadership, and people leadership' (Claus, et al., 2011, p. 263).

Figure 1. Ranked International Selection Criteria

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|--------------------------------|---|
| 1. Ability to adapt | 6. Previous overseas experience |
| 2. Technical competence | 7. Understanding of host country culture |
| 3. Spouse and family adaptable | 8. Academic qualifications |
| 4. Human relations skill | 9. Knowledge of language of country |
| 5. Desire to serve overseas | 10. Understanding of home country culture |
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Source: Derived from Stone 1991, p. 10, originally from Tung 1982

Despite the volume of evidence demonstrating that a broad range of criteria should be used and variety of skills sought during expatriate selection (Black, Mendenhall, & Oddou, 1991, p. 294), the theory appears rarely applied to the practical selection process (Stone, 1991; Tung, 1982). Organizations continue to assign individuals on the basis of limited and less-than-appropriate selection criteria. 'Soft skills' such as relational abilities are well recognized by firms as required for successful international management (Collings, Scullion, & Morley, 2007, p. 208; Stone, 1991, p. 10; Tung, 1981, p. 75), but selection is commonly based purely on technical competence or home country expertise (Tung, 1981, p. 69). Even when differing attributes are acknowledged as relevant for different categories of jobs, these perceptions of relevance are frequently not matched by actual selection procedures (Tung, 1981, pp. 74-76). Recent research findings suggest that selections continue to be made on a narrow basis, such as willingness to be expatriated and/or previous international experience (Claus, et al., 2011, pp. 258-259).

Training

A parallel paradox to selection criteria exists in relation to expatriate cross-cultural training. There is strong evidence that cross-cultural training prior to departure is beneficial (Clegg & Gray, 2002; Kwintessential, 2009), valuable or very valuable in increasing offshore worker productivity by up to 30% (Accenture, 2006). Training has been found to reduce the time expatriates require to adjust before they can perform productively (Eschbach, Parker, & Stoeberl, 2001) as pre-departure and post-arrival support help expatriates to adjust more quickly and perform more effectively (Shin, Morgeson, & Campion, 2007, p. 78). Companies which do not offer cross-cultural training report a higher incidence of miscommunication problems (Accenture, 2006). Despite findings that human resource management can hasten adjustment and performance (Howe-Walsh & Schyns, 2010) and of the value of training for adjustment, little or negligible pre-departure cross-cultural training is provided by many MNCs (Hutchings, 2003, p. 375; Tucker, Bonial, & Lahti, 2004, p. 248; Tung, 1981, p. 76; 1987, p. 120). Reasons given for this include a reluctance to invest funds to train employees the company fears may leave (Tung, 1987, p. 120), because organizations claim to be employing more local and fewer expatriate employees, the temporary nature of IAs, lack of time (Tung, 1981, p. 76) or because expatriate training is not deemed a 'business issue' (Tucker, et al., 2004, p. 248).

Adjustment

Although many international firms have been criticized for neglecting the role of adjustment during selection and training, it seems self-evident that expatriated workers will be required to adapt at least some of their behavior to aspects of the host culture (Shin, et al., 2007, p. 78). Identification and understanding of these adjustments and their antecedents or predictors has thus been a major focus within expatriation research.

Black, Mendenhall and Oddou (1991) integrated early theoretical and empirical work from both the domestic and international adjustment literatures in order to produce a comprehensive theoretical framework of propositions to guide research on adjustment in cross-cultural settings. In their view, international adjustment is multi-faceted, and a matter of degree and mode. They propose that international adjustments can occur pre-departure and/or in-country and can be investigated according to the specific factors or independent variables included in Table 2 below.

Table 1. International Adjustments

Anticipatory Adjustment	In-country Adjustment
Individual factors 1. Accurate expectations 2. Previous international work experience	Individual factors 5. Self-efficacy or self-belief 6. Relational skills 7. Perceptual skills 8. High self-efficacy associated with changing the work environment or low self-efficacy associated with changing the individual 9. Role clarity and discretion 10. Lack of role conflict or role novelty belief
Organizational factors 3. Pre-departure cross-cultural training 4. Use of a wide array of selection criteria and choice made from a pool of candidates	Job Factors 11. High role discretion 12. Low role novelty 13. Low organizational culture novelty 14. Social support from organizational members
	Organizational culture factors 15. Logistical support from organization
	Organizational socialization factors 16. Institutional/individual socialization tactics and low/high role innovation 17. Institutional/individual socialization tactics, congruent content and low/high role innovation

Source: Derived from Black, Mendenhall & Oddou 1991, pp.305-312

The authors contend that these seventeen independent variables act as antecedents to dependent variables which constitute the three facets of cross-cultural/sociocultural adjustment: 1. General adjustment; 2. Work adjustment; and 3. Interaction adjustment (Black, et al., 1991, p. 304), with interaction adjustment identified as the most difficult to achieve (Selmer, 2006, p. 359). This framework focuses on factors related to the individual and to the organization but makes no mention of communication as either an independent or dependent variable. The three dimensions of sociocultural adjustment have formed the basis of a wealth of subsequent empirical research, although others argue that psychological adjustment should be added as a fourth dimension (Searle & Ward, 1990; Selmer, 2001, 2004; Selmer, Chiu, & Shenkar, 2007, p. 155; Ward & Kennedy, 1994).

Other writers have constructed comprehensive models to investigate the predictors and outcomes of adjustment. One such model, focusing more sharply on individual assignee variables, was developed and then tested with expatriates both prior to ten months after IA relocation. Results indicate that job effectiveness correlates with intercultural adjustment. Of the fourteen predictors, ten were found to have contributed significantly to the prediction of intercultural adjustment (Tucker, et al., 2004, p. 247). Despite communication being identified within this model as an example of behavioral adjustment, testing found that communication scale to be rated as the lowest of the six aspects of intercultural adjustment and not significantly related to performance (Tucker, et al., 2004, p. 248).

Table 2. International Adaptation and Antecedents

Prior To Assignment	During Assignment
Expectations	
World View Open-Mindedness Respect for Other Beliefs Tolerance for Different Conditions	Cognitive: Knowledge and Interest in the Country of Assignment
Behavioral Approach to Situations Flexibility Patience Sense of Humor Initiative Risk taking	Behavioral: Acceptance of the Local People and Culture Lifestyle Adjustment to the Country of Assignment Effective Intercultural Communication Across Cultures Interaction with Local People and Their Culture
Social Interpersonal Style Trust in People Interpersonal Interest Social Adaptability	Affective: Affect or Positive Feelings of Well-Being
Locus of Control	
Spouse Communication	

Source: Derived from Tucker, Bonial and Lahti 2004, p. 228

The empirical literature contains a wealth of information about the predictors of successful expatriate adjustment. Research has empirically demonstrated that ‘expatriate work requires higher levels of social and perceptual skills, reasoning ability, and achievement and adjustment orientation than domestic work’ (Shin, et al., 2007, p.78). Expatriates with particular characteristics have also been shown to perform more successfully (Clegg & Gray, 2002). Extraversion, emotional stability, openness and agreeableness have been found to have a significant, positive impact on expatriate adjustment and job performance (Downes, Varner, & Hemmasi, 2010), whereas self-efficacy, social support and cultural novelty have also been identified as predictors of both adjustment and strain (Hechanova-Alampay, Beehr, Christiansen, & Van Horn, 2002). Other more specific investigations have revealed many other characteristics to be related to expatriate performance. These include: older age (Selmer, 2001; Selmer, Luring, & Feng, 2009), younger-aged SIEs (Selmer & Luring, 2009, p. 2), cross-cultural awareness, host language skills, family requirements (Petersson, 2010; Selmer, et al., 2009), common mother culture (Kao, Sek Hong, & Yee Kwan, 1990), marital status (Selmer, 2001), emotional adaptability (Molinsky, 2007, p. 635) cultural intelligence also (Earley & Mosakowski, 2004; UGM Consulting, n.d., p.3) and previous international experience (Yamao & Kase, 2011, p. 14).

Performance

The underlying assumption within many studies seems to be that effective performance, and hence assignment success, is merely the absence of obvious IA failure. However, rather than dwelling on expatriate failure, it is more constructive for academics and practitioners to broaden their focus to the general theme of expatriate performance (Collings, et al., 2007, p. 203) by being able to identify predictive factors assists the appropriate selection, preparation and ongoing support of IA employees, their sociocultural adjustment and thereby performance (Claus, et al., 2011). These authors have very reviewed a broad range of literature to very recently produce a new comprehensive conceptual framework for research into the multiple predictors of expatriate

adjustment and job performance (2011). The authors identified three streams of empirical research and six streams of theoretical explanation. The empirical stream included research at the individual, organizational and societal levels. The six theoretical streams were personality theory, cultural adjustment theory, person-environment fit theory, social capital-network theory, cultural theory and institutional theory. The authors integrated these separate predictors of expatriate performance to produce thirty five separate hypotheses by which to assess the job performance of expatriate managers. Whilst it is unlikely that any single empirical study could test all hypotheses, this conceptualization is currently the most thorough holistic picture of the complexity of expatriate performance. Communication receives just one brief mention within this framework, conceived to be an aspect of cultural sensitivity, separate from language ability (Claus, et al., 2011, pp. 255-6).

A significant relationship has been found between individual predictor variables and cultural adjustment, and subsequently between intercultural adjustment and job performance. Expatriates who are adaptable have been shown to perform better (Du-Babcock, 2000; S. Wang, Tong, Chen, & Kim, 2009), and those who self-rate their job effectiveness as high also receive high scores for intercultural adjustment (Tucker, et al., 2004). A relationship has also been identified between expatriate interaction adjustment and communication performance (L. Lee, 2009), although it is as yet unclear whether communication is an outcome and/or a mediating factor. On the other hand, those who are unable to understand or adapt to the new culture fail (Martin & Chaney, 1992).

Although it appears perfectly reasonable to accept that expatriate adjustment automatically facilitates performance, some authors question this view. Concerns have been expressed in the literature about the nature of the relationship between antecedents and adjustment, and about the need for the relationships to be tested via multi-factorial measures (L. Lee, 2009, pp. 25-26). Lee is an exception who presents a multi-dimensional view of the relationship between cross-cultural adjustment and job performance. Her findings demonstrate that antecedents do result in work performance, but that they are mediated by the three dimensions of cross-cultural adjustment, work, general and interaction cross-cultural adjustment, with differential roles being played by those three dimensions (L. Lee, 2009, p. 2).

Benefits and Costs

International assignments are extremely expensive; however, as yet no theoretical or practical evaluation framework exists to measure this costly activity. Few firms seem to have any clear understanding of either the costs or the potential benefits which flow from IAs (Collings, et al., 2007, p. 202; Jokinen, 2010, p. 334) and some believe expatriates have 'questionable value in terms of productivity and ability to drive the business' (Brubaker, 2008). The value or benefits to the employing organization may include Return on Investment (ROI), however ROI by itself is unlikely to represent all the benefits to be gained (McNulty & De Cieri, 2011, pp. 21-22). Further research may shed light on the issue of benefits.

As it is extremely expensive to relocate expatriates overseas, costs are seen as a key issue in the global staffing literature (Bonache, et al., 2010, p. 265). Expenditure on an each expatriate IA has been estimated as ranging from US \$300,000 to \$1million per annum (Selmer, 2001, p. 1219). These include the direct costs of salary, training, travel and relocation expenses as well as perhaps the possibly more significant indirect costs of poor performance such as damaged relations with host country organizations, loss of market share (Collings, et al., 2007, p. 203), loss of reputation, loss of business or subsequent recruitment difficulties (Black & Gregersen, 1990, p. 485).

If the expatriate is unable to adjust within the new cultural context of their foreign assignment, they are likely to either perform poorly (Black & Gregersen, 1990) or return home prematurely with their

family (Selmer, 2001, p. 1219). Assignment failure is thus frequently judged on the basis of either poor performance or premature curtailment of the assignment. Whilst there is a dearth of specific information relating to the former, the literature contains a plethora of data in relation to attrition rates. These have been variously reported as 8% (Forster, 1997), 10 to 50% (Eschbach, et al., 2001; Hechanova-Alampay, et al., 2002, p. 465), 16 to 40% (Black & Gregersen, 1990, p. 485), 10 to 40% (Tung, 1981, p. 77), up to 40% (Randlesome & Myers, 1995, p. 42) and 60% (Brubaker, 2008). Early return rates appear to be much higher for American expatriates than those from other countries such as England and Japan (Black & Gregersen, 1990; Forster, 1997; Tung, 1982). Premature termination and repatriation of an IA is expensive, estimated as between US\$55,000 and US\$150,000 (Black & Gregersen, 1990, p. 485) and in another study as between US\$250,000 and US\$1 million per person, depending on the employee's salary (Randlesome & Myers, 1995, p. 42). National direct costs of premature returns in 1985 were in excess of US\$2 billion per annum (Black & Gregersen, 1990, p. 485).

Reasons for IA Premature Termination

For several decades, studies investigating the reasons for premature termination of IAs have produced remarkably consistent results (Stone, 1991; Tung, 1981, 1982, 1987). In descending order of importance, the standard reasons given for poor performance and premature returns by American expatriates in the different physical or cultural environment are presented in Figure 2 below.

Figure 2. Reasons for Poor Expatriate Performance

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1. Inability of the manager's spouse to adapt
 2. Manager's inability to adapt
 3. Other family related problems
 4. Manager's personality or emotional immaturity
 5. Manager's inability to cope with the responsibilities posed by the overseas work
 6. Manager's lack of technical competence
 7. Manager's lack of motivation to work overseas
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Source: Derived from Tung 1981, p. 76

Thus factors unrelated to work and including general satisfaction (Black & Gregersen, 1990, p. 498) have the greatest negative impact on expatriates and the completion of their IAs. Lack of technical skills and lack of motivation appear unproblematic, probably because selection is based on such factors as discussed above. There are many negative outcomes for expatriated individuals. These include the 'considerable stresses and strains experienced by a minority of staff who are under-performing on IAs . . . , the negative (and largely unreported) effects on some families and the career prospects of partners and negative views about the prospect of overseas postings in the future' (Forster, 1997, p. 414). Notwithstanding these individual costs, high organizational costs result from relocating expatriates and families overseas, premature repatriation, and the 'poaching' of successful managers by other companies during or following repatriation. It is therefore in the best interests of MNCs to address the issue of staff turnover and failed assignments (Brubaker, 2008). Even though the predictors of IA failure appear widely known, it is counterproductive for organizations to ignore them during expatriate selection. In addition, many organizations are now looking at a number of more flexible forms of expatriation as well as complementary strategies which exploit new staffing alternatives to the conventional expatriate (Thite, et al., 2009, p. 269).

Alternative Forms and Categories of Expatriation

During recent years, a variety of different forms of IAs have emerged in addition to temporary expatriation. These are discussed within the literature as short-term IAs, frequent flyer assignments, commuter and rotational assignments and global virtual team IAs (Collings, et al., 2007). Similarly, the global workforce has become more heterogeneous and a range of different types of people have become identified within the international management literature and categorized according to specific features or criteria. These are discussed below in terms of eight categories which are not necessarily mutually exclusive. Each has implications for expatriation and intercultural communication research and so needs to be recognized.

The first category comprises the 'traditional' expatriate, but more accurately described as *assigned expatriates* (AEs) (Cerdin & Le Pargneux, 2010). These expatriates are sometimes identified as *sojourners* to emphasize the temporary nature of their situations (Abe & Wiseman, 1983; Gillespie, McBride, & Riddle, 2010; Gudykunst, 2002; Hechanova-Alampay, et al., 2002; Kristjansdottir, 2009; Leong & Ward, 2000; Milstein, 2005; Searle & Ward, 1990; Shapiro, Ozanne, & Saatcioglu, 2008; Ward & Kennedy, 1994).

In diametric contrast to IAs, the second category is made up of *self-initiated expatriates* (SIEs), a relatively new but rapidly growing group of 'whose international experience is not initiated by an international transfer within an organization but rather those who relocate abroad without organizational assistance and of their own accord' (Collings, et al., 2007, p. 204). These SIEs are not sent by their companies but rather 'travel on their own initiative and thus do not benefit from organizational support . . . conceptualized as free agents who cross organizational and national borders, unobstructed by barriers that constrain their career choices' (Al Ariss & Özbilgin, 2010, p. 276). Originally termed self-initiated foreign workers, SIAs were not mentioned at all in the literature prior to 2000 (Suutari & Brewster, 2000), became first recognized during the early 2000's (Brubaker, 2008) and have only very recently emerged as a research focus (Ariss & Öbilgin, 2010; Collings, et al., 2007; Howe-Walsh & Schyns, 2010; Hu & Xia, 2010; Richardson & Mallon, 2005; Selmer & Luring, 2009; Suutari & Brewster, 2000; Teagarden, 2010). In China many Australian SIEs refer to themselves affectionately as *half-pats* (Brubaker, 2008; Teagarden, 2010).

In addition to distinguishing between expatriates as either assigned or self-initiated, the international management literature differentiates between expatriates according to their nation of origin. Thus we read about a third category of *parent-country nationals* (PCNs) (Thite, et al., 2009, p. 269; Tung, 1982) who are 'citizens of the home country of the MNC' (Tung, 1982, p. 59) together with a fourth category of *third-country nationals* (TCNs) (Harvey, et al., 1999; Tung, 1982) who are 'neither citizens of the home country of the MNC nor of the country in which the foreign operation is located' (Tung, 1982, p. 59).

A fifth expatriate sub-grouping encompasses those executives or managers who relocate from IA in one country to the next perhaps without returning to the home country organizational headquarters. They are known variously as *career expatriates* (Varner & Beamer, 2011, p. 416), *global managers* (Cappellen & Janssens, 2010; Suutari, 2003), or *global nomads* as 'employees that continuously move from country to country on multiple assignments' (Mercer, 2008). Some refer to them less formally as *globpats*, sent to different markets on short or medium length assignments as 'business-builders and troubleshooters'. (Quelch & Bloom, 1999, p. 7). Indeed, it has been noted that that both individuals and organizations are now using IAs as a major tool with which to develop themselves or their employees as global leaders (Dickmann & Doherty, 2010, p. 313; Suutari, 2003, p. 188).

The literature also has spawned acronyms to describe the different categories of inpatriates (Harvey, et al., 1999, p. 460-461) or local citizens employed within foreign MNCs and /or managed by expatriates within the host country. These inpatriates are differentiated according to their most recent nation of residence. The sixth global worker category constitutes *host-country nationals* (HCNs) (Caprar, 2011; Harvey, et al., 1999; Tung, 1982; Vance, Vaiman, & Andersen, 2009) who are 'citizens of the country of the foreign operation' (Tung, 1982, p. 59) or local nationals (Quelch & Bloom, 1999). However a seventh category is made up of *ex-host country nationals* (EHCNs), a term first coined by Tung in 2006 to describe 'successful Chinese and Indians professionals in North America professionals who were returning to their respective countries of origin (COO), to take advantage of the economic opportunities in these markets' (Tung, 2009, p. 11). Some researchers use the alternative term *expatriates of host-country origin* (EHCOs) for these workers who 'are more willing to accept expatriate assignments than parent-country nationals (PCNs)' (Thite, et al., 2009, p. 269). From a Chinese perspective, EHCNs and ECHOs are more correctly labelled *returnees* (Tung, 2007), and known as *hai gui* ('sea turtle') or *haidai* ('sea kelp') (Gallo, 2008, p. 212; Tung, 2007, p. 880). These terms reflect the lowly status in Chinese society afforded to those who had left China to work or study abroad but later returned, and the negative and increasingly derogatory opinions of some mainland Chinese who had felt left behind (Tung, 2007, p. 880). From a non-Chinese perspective these Chinese are sometimes identified within the literature as *overseas Chinese* or the *Chinese diaspora* (Ramamurti, 2010; Thite, et al., 2009; Tung, 2007; C. Wang, 2009).

An eighth group of global citizens is starting to receive attention within the IM literature (Hoersting & Jenkins, 2011; Yoshida, et al., 2009) These are the *third culture kids* (TCKs), or children of expatriates, who had 'spent at least two years before age 18 in a country different from their parents' home culture, then returned to the latter' (Hoersting & Jenkins, 2011, p. 17).

The Study

In a rapidly changing globalised business world many of the above alternatives to traditional expatriation represent very recent developments, so relatively little data has been collected or findings reported in the expatriate literature about them or the particular nature of their IA experiences. This study thus aims to provide a morsel of recently collected empirical data about newly emerging expatriation alternatives. Representing a small part of a larger investigation into the intercultural communication adaptations of Australian expatriate managers working in Shanghai, it offers up-to-date information about these global employees in the attempt to further understand and clarify the predictors of IA cultural adjustment and performance and to make suggestions regarding the possible role to be played within adjustment by intercultural communication adaptations.

Data Collection

In order to collect data, three fieldwork visits were paid to Shanghai between November 2009 and December 2010, and a total of 54 AE or SIE expatriate individuals were interviewed. Interviewees were recruited via four different approaches: 1. Open invitation via the weekly electronic newsletter letter of the Australian Chamber of Commerce (AustCham Shanghai); 2. Individual invitations made by the AustCham Shanghai; 3. Invitations made by participants; or 4. Expatriates who offered to participate, having incidentally become aware of the investigation.

Interviews were semi-structured and of between 30 and 90 minutes in duration, using a standardized interview script. Detailed handwritten notes were made during the interviews, with most interviews were audio-recorded. Second and third follow-up interviews of greater depth were

conducted with eight respondents producing a total of 63 interviews. All interviews were conducted in English and by the one interviewer.

Results

The primary focus of the interviews was to collect qualitative data regarding the participants' personal experiences and perceptions in relation to their and their subordinates' intercultural communication adaptations. An initial analysis of the biodata of the 49 expatriate interviewees reveals some unexpected findings. This information is presented in Table 3.

Table 3. Demographic Data Summary (n = 49)

		Assigned Expatriates	Self-initiated Expatriates	Total
	Total	19	30	49
Gender	Male	16 (84.2%)	13 (43.3%)	29 (59.2%)
	Female	3 (15.8%)	17 (56.7%)	21 (40.8%)
Generation	Baby Boomer	9 (47.4%)	5 (16.7%)	14 (28.6%)
	Gen X	9 (47.4%)	13 (43.3%)	22 (44.9%)
	Gen Y	1 (5.3%)	12 (40%)	13 (26.5%)
Organisational position	Senior management	14 (73.7%)	13 (43.3%)	27 (55.1%)
	Middle management	3 (15.8%)	15 (50%)	18 (36.7%)
	Lower management	2 (10.5%)	2 (6.7%)	4 (8.2%)
	Non-managerial	0 (0%)	0 (0%)	0 (0%)
Mandarin Skills	Native speaker	4 (21%)	3 (10%)	7 (14.3%)
	Advanced	4 (21%)	16 (53.3%)	20 (40.8%)
	Intermediate	5 (26.3%)	7 (23.3%)	12 (24.5%)
	Basic	6 (31.6%)	4 (13.3%)	10 (20.4%)
Other expatriate subcategories	PCNs	15 (78.9%)	21 (70%)	36 (73.5%)
	TCNs	2 (10.5%)	1 (3.3%)	3 (6.1%)
	EHNCS	2 (10.5%)	8 (26.7%)	10 (20.4%)
	TCKs	0 (0%)	0 (0%)	0 (0%)
Years in Shanghai (average)		3.7	4.2	4.0

Results show that there are major demographic differences within the expatriate sample, which become even clearer once the interviewees are divided into AEs and SIEs. This division highlights the significant gender differences between the two groups, with females constituting less than 16% of AEs but 60% of SIEs. Generational differences also occur, although it is not surprising that almost half of the AEs are Baby Boomers, whereas 40% of SIEs are Gen Y. Similarly it is predictable that two thirds of the AEs are senior managers in comparison with just over one third of SIEs, with over half of SIEs working as middle managers. When the expatriates are subdivided into the other categories discussed above, the vast majority of both AEs and SIEs are PCNs. However, what is far more striking is that only 10% of AEs but over one quarter of SIEs are EHCNs. Some of these are Chinese returnees who had studied and/or worked overseas, and others who had been immigrants to Australia or are the offspring of immigrants. Knowledge of Mandarin is predictably strongly associated with EHCNs, but AE language proficiency patterns in the sample are very different to those of SIEs. There is a spread of proficiencies amongst the AEs, but although fewer of the SIEs are native speakers, over half of the SIEs possess advanced language skills in comparison with about one fifth of the AEs. Similarly, almost one third of AEs but only one eighth of SIEs speak Mandarin at a basic level only. Interestingly, both AEs and SIEs have spent almost the same number of years working in Shanghai with many having also studied and/or worked previously in other parts of Asia.

Discussion

The major focus within the expatriate literature is on adjustment antecedents, for both the selection of expatriates and prediction of performance. It is therefore appropriate to reflect on the ten selection criteria included within Figure 1 in light of our results. The SIEs within this sample clearly fit the profile of an adaptable expatriate according to at least seven of the ten factors. They are tertiary-educated, demonstrate a desire to work overseas, have knowledge of Chinese language and culture as a result of their tertiary studies and all have had some other previous overseas experience. At least at the outset of their relocation they had no spouse or children whose adjustment difficulties could otherwise prompt early departure. They have been working in Shanghai for sufficiently long to be deemed adaptable, for if they had not adapted they would have already departed. They are educated and employed and therefore must also be assumed to have technical and human relations skills, notwithstanding the fact that skills shortages within Shanghai provide plentiful work opportunities.

Advantages and Disadvantages for Employing Organizations

From an organizational perspective, there are four major advantages of these young, Gen Y SIEs. First and foremost, they are available. This meets the key challenge of MNCs experiencing shortages in supply of experienced and competent global managers (Collings, et al., 2007, p. 200) and those which prefer ad hoc and circumstantial recruitment practices (Suutari & Brewster, 2000, p. 453). Second, SIEs constitute a rich source of cheap labor (Suutari & Brewster, 2000, p. 435), costing far less than AEs, level of management notwithstanding. They entail no relocation costs for themselves or for family, and can be paid wages lower than AEs although higher than PCNs. As they have voluntarily self-selected themselves for expatriation and their characteristics match proven selection criteria, the issue of early return as a consequence of non-adjustment is unlikely to arise. As they are single, the issue of family non-adjustment prompting premature curtailment of the posting is irrelevant. Third, they are educated, willing, enthusiastic, culturally savvy and adaptable. They may require little or no language or cross cultural training because of the nature of the internationalized tertiary courses they chose to complete in Australia, which frequently included foreign language study and overseas internships and which was typically completed alongside large numbers of Asian international students. Finally, they are also strong social networkers so can be expected to understand how to foster and accumulate valuable local connections. Ongoing analysis of the

interview data will investigate whether or not either the older, more traditional AEs and/or younger SIEs, continue to live and work in a 'colonialist', non-Chinese expatriate bubble environment and engage in little outside-work socialization with local Chinese.

Nevertheless there is a negative side to this rosy picture. As the SIEs age they may acquire partners and children whose adjustment needs may then become problematic and prompt a return to Australia. On the other hand it is always possible that some will marry HCNs or EHCNs within China, have children and effectively become permanent residents. The major organizational disadvantage of SIEs is retention, as seventeen of the thirty SIEs included within this study changed their employers within the twelve month data collection period. Other studies have already shown that SIEs are focused on the development of their individual professional skills and internationalized careers (Cerdin & Le Pargneux, 2010, pp. 296-297). They are also mostly members of Gen X and Gen Y, so tend to be self-focused, self-confident and easily bored. Consequently, these young SIEs are prepared to change jobs frequently, and the interview data supports this tendency within a context of a shortage of talent, to either 'job-hop' when a better opportunity presents itself or be poached by other organizations. The very fact that these individuals are prepared to relocate overseas without the support of any employing organization indicates their primary loyalty is of independence rather than organizational commitment.

Implications for Sociocultural Adjustment and Intercultural Communication Adaptation

It is exciting to consider the implications of this emerging SIE cohort for both expatriate adjustment and performance in general, and intercultural communication in particular. Even though the expatriate literature retains a consistent focus on adjustment, there is wide agreement that our knowledge of expatriate adjustment is in many ways incomplete and yet to be clearly understood. Conceptual models may appear comprehensive, but the extant literature is based on quantitative methodologies so our understandings are broad but shallow. Given the significant differences between SIEs and traditional EAs, the expatriation literature cannot be assumed to be applicable (Suutari & Brewster, 2000, p. 435) and so a standardized IHRM approach for all types of expatriate employees is untenable (Collings, et al., 2007, p. 199). However, having both selected the country and specific location and also relocated themselves devoid of any company assistance, SIEs are demonstrably opportunists (Suutari & Brewster, 2000, p. 430) who are intrinsically motivated, willing and committed to their expatriation. Many will arrive already aware or well prepared in terms of language, sociocultural knowledge and the intercultural skills critical for temporary relocation. This would include some or all of the acknowledged key sojourner adaptation variables of '(a) perception of and attitude to ward the host society, (b) satisfaction and psychological adjustment, (c) patterns of interpersonal relationships, and (d) linguistic and other element of intercultural competence' (Kim, 2001, p. 16). It is therefore possible to conclude that SIEs demonstrate an attitudinally high potential for adjustment and performance.

When these young SIEs expatriate themselves, they do not leave behind their generational characteristics. As members of Gen Y, they are committed lifelong learners, with a more global outlook and strong need to belong, who regard communication as important in order to truly engage (Petroulas, Brown, & Sundin, 2010, pp. 228-229). They are also keen and independent self-improvers and problem-solvers who expect to learn new things (Kehrli & Sopp, 2006, pp. 118-119). Though educated and skilled, they expect to be challenged, and to have their skills developed to enjoy their work but not to the detriment of their work-life balance (Petroulas, et al., 2010, pp. 233). They are high-performing and comfortable with flexibility and change (Gumz & Dashukewich, 2010, p. 31) work well in teams and with diverse co-workers (Brazeel, 2009, p. 2). These qualities all indicate that they have a very high likelihood for successful intercultural communication and interpersonal adaptations.

Limitations and Future Directions

As with any other study, this one has a number of limitations. First, the sample is relatively small and not representative, so the brief generalizations presented above may not necessarily be extended to other samples. Findings therefore need to be considered as exploratory and indicative of general possible trends, rather than as claiming statistical significance. Second, the interviews were conducted for the primary purpose of exploring Australian expatriate managers' intercultural communication adaptations. On the one hand this is an advantage, in that the researcher could have made no effort to lead the interviewee or bias the interview data in relation to the AE versus SIE distinction. However it is also a disadvantage, as not all respondents were asked or provided complete or unambiguous biographical information, so some data needed to be deduced from what information was provided. Third, allocating definitive categorizations was found to be a fraught process. For example, some respondents had changed their circumstances, having initially been sent to Shanghai as AEs but then resigning and becoming SIEs. In other situations, very fine differences separated individuals. Several respondents had at least one EHCN parent, but some were actually born in Australia and others had immigrated as children. The decision was made to categorize all such individual SIEs as EHCNs. Nationality is also problematic as some individuals possess dual nationality, and other individuals have changed their nationality, so which is their 'parent' country and which is to them a 'host'? For this study allocations were made on a more holistic basis rather than on technicalities. However it is recognized that others may argue for a more literal interpretation of the options, which could then impact on findings.

In relation to the present study, there remains much to be done. One further data collection visit will be made to Shanghai to conduct interviews, this time focusing on foreigner-local dyads and multi-actor, multi-level perspectives to test expatriate perceptions. This will provide a final opportunity to include more specific probes in relation to the biodata, and possibly differential experiences and perceptions of AEs and SIEs. Following completion of data collection, intensive analysis of the interview transcript data will be conducted in light of the biodata differences within the sample in order to identify possible patterns and generalizable conclusions. Other researchers may also choose to conduct investigations to test and perhaps extend these general findings. Investigations of SIEs in other cross-cultural contexts from other home countries in other host countries could be very enlightening, as could a more extensive and more rigorous quantitative study. Ongoing and longitudinal research is required to map and project changes in expatriation trends. Such information is potentially of great practical value to employers. Finally, a more cross-disciplinary approach to intercultural adjustments in cross-cultural contexts could result in the integration of findings on intercultural communication adaptations with those of expatriation adjustment, with the potential to extend knowledge and understanding within both domains.

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