



# EXPATRIATE PRACTICES IN GERMAN, JAPANESE, U.K., AND U.S. MULTINATIONAL COMPANIES: A COMPARATIVE SURVEY OF CHANGES

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*In this article we present expatriate management policies and practices of 136 large multinational companies (MNCs) based in four different countries: Germany, Japan, the United Kingdom, and the United States. The findings we focus on include staffing, selection, training, and success. By analyzing our own results as well as comparing them to previous findings, we examine the changes in expatriate practices over time. In the managerial and research implications sections, we share additional findings and our thoughts about future issues and trends in expatriation. © 2009 Wiley Periodicals, Inc.*

*Keywords:* human capital, internal labor market, recruitment, reward systems, training and development, work-family conflict, careers, strategic HR, international HRM, supervisor/subordinate relations

## **Are Management Practices Converging or Diverging?**

In the last two decades, political, economic, and particularly market forces and a continual quest for growth have led to increased internationalization and, in a growing number of cases, to the globalization of organizations. Parallel to these changes, researchers as well as practitioners began to ask questions about the best ways to operate at the international level and whether organizations and management practices would converge or diverge over time (McGaughey & De Cieri, 1999).

Early studies of comparative labor economics suggested that industrialization

would result in converging managerial practices (Kerr, Dunlop, Harbison, & Meyers, 1960). They suggested that technological developments would override the differences that might arise due to divergent national values and beliefs, and therefore organizational structures and management practices would become similar across countries. The studies cited worldwide communication systems, travel (Levitt, 1983), and cooperation between organizations (Doz & Prahalad, 1991) and countries (Ghoshal & Nohria, 1993) as additional factors decreasing the differences between organizations and management practices around the world. By contrast, the divergence argument suggests that organizations maintain their culturally de-

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pendent differences (Adler, 1986). The studies also cited local cultures and institutional complexities surrounding multinational companies (MNCs) as forces acting against convergence (Hall & Soskice, 2001).

The verdict is not yet in about whether organizations and management practices will converge or diverge, and perhaps we cannot even make a judgment using such polarities as convergence and divergence. Child (1981) pointed out that the convergence-divergence question is more complex than a scale with two ends, and there are different levels to consider. First, we

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can look at macrovariables (such as economic ideology, structure, and technology) and microvariables (such as employee behavior in organizations). Next, as Rousseau and House (1994) and McGaughey and De Cieri (1999) suggest, we should also consider the meso level, which refers to an “integration of micro and macro theory in the study of processes specific to organizations which by their very nature are a synthesis of psychological and socioeconomic processes” (Rousseau & House, 1994, p. 14). In a somewhat different view, Ralston, Holt, Terpstra, and Kai-Cheng (1997) suggest the possibility of “crossvergence” where “an individual incorporates both national culture influences and economic ideol-

ogy influences synergistically to form a unique value system that is different from the value set supported by either national culture or economic ideology” (p. 183). This type of “crossvergence” may be envisioned at all levels of organizations and processes.

Research so far seems to have found more evidence for divergence. In a rare longitudinal study, for example, Pauly and Reich (1997) found dissimilarities in both structures and strategies when researching changes over time in the internal governance and financing, research and development (R&D)

activities, and trading strategies of leading MNCs in Germany, Japan, and the United States. A substantial amount of research has shown that management practices vary based on their culture of origin (e.g., Hofstede, 1980, 1994a, 1994b; House, Hanges, Javidan, Dorfman, & Gupta, 2004; Kopp, 1994; Laurent, 1983, 1986). Comparing the findings of studies from different areas of the world (e.g., Brewster & Tyson, 1991; Kopp, 1994; Tung, 1988; Welch, 1994), one can see that international human resource practices differ among American, European, and Japanese firms. The Best Practices Project in international HR management (von Glinow, Drost, & Teagarden, 2002) covered ten countries/regions. Although the researchers found some universal best practices, they also discovered a number of differences in practices across countries and regions. Myloni, Harzing, and Mirza (2004) compared HR practices of large local Greek firms and subsidiaries of MNCs in Greece. Interestingly, they found that not only did the local HR practices reflect the Greek culture, but the MNCs’ subsidiaries also seemed to have adapted to the local culture in some of their practices.

The present study set out to examine converging or diverging trends in one specific area of international HR management: expatriation. Because of their international nature, expatriate practices, when compared across organizations with different parent countries, can provide a useful platform for assessing the cross-border convergence or divergence of management practices generally.

## Expatriation

As globalization continues to increase, expatriates continue to play important roles in MNCs (Mendenhall, 2001; Stahl, Miller, & Tung, 2002). In this particular area, however, we know perhaps even less about possible converging and diverging trends than in other areas of management. We have quite a lot of data about how national cultures influence specific elements such as the selection, training, and adjustment of expatriate management (Fish & Wood, 1996;

Forster, 1992; Gertsen, 1990; Kopp, 1994; Tung, 1988), but the majority of research has concentrated on single countries (e.g., Fish & Wood, 1996; Kealey, 1990; Scullion, 1994). Tung (1982) conducted the most extensive comparative study of expatriation in culturally different areas in the world. She surveyed 80 American, 29 Western European, and 35 Japanese companies on the following subjects: (1) staffing policy (why companies use expatriates and whether MNCs fill different management positions with parent-country, third-country, or host-country nationals); (2) selection procedures; (3) selection criteria; (4) type and extent of predeparture training; and (5) success and failure rates of employee placement (the latter is indicated by premature return to the person's home country) and the reasons for failure. Tung studied these issues for four different job categories: the CEO, the functional head, the troubleshooter, and the operative. Since Tung's extensive study, two further studies have compared expatriate management practices in different parts of the world (Peterson, Napier, & Shul-Shim, 2000; Peterson, Sargent, Napier, & Shim, 1996). Peterson et al. (1996, 2000) reported their findings based on a survey of 54 MNCs and 29 MNC corporate and 46 foreign subsidiary face-to-face or telephone interviews. During the first stage of their study, Peterson et al. (1996) assessed how MNCs in different parts of the world vary on best expatriate practices. The MNCs' parent countries were the same as in the present study: Germany, Japan, the United Kingdom, and the United States. The study measured best practices based on the following criteria: (1) trends in expatriate use (how extensively expatriates were used compared to ten years previously; the extent to which expatriates staffed subsidiaries); (2) expatriate preparation (the lead time expatriates had before the assignment; the importance of language facility; the degree to which the firm provided information about the assigned country); (3) in-country assistance (the extent to which the firm encouraged foreign language study in the assigned country; assistance finding other expatriates); and (4) career

management and assistance (mentoring before, during, and after assignments; ensuring a comparable job upon reentry). Peterson et al. (1996) found significant differences in the best practices among Europe, Japan, and the United States.

We agree with McGaughey and De Cieri (1999) that in order to identify similarities, differences, and changes in organizations and management practices over time—that is, to find arguments for convergence or divergence—replication of earlier research and longitudinal studies are needed. One limitation of the present study is that it is, by necessity, cross-sectional. To mitigate this limitation, we decided to analyze our data in two ways. We not only compared the results across countries to see whether or not they were significantly different, but we also included a comparison with Tung's (1982) study to analyze the developments over time. Although we do not replicate Tung's research, we feel that the similar research questions and geographical areas the two studies covered, the roughly two-decade time difference between the two studies, and the advancement of international business as well as management practices over these two decades make a good case for comparing the two studies' results. Where possible and appropriate, we also compare our findings with those of Peterson et al. (1996, 2000).

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### **Staffing, Selection, Training, and Premature Returns**

Within the area of expatriation, the topics we treat in this article are staffing, selection, training, and premature returns. We selected these areas from a wider set of topics covered in our research study, because previous study results were available in these areas. The following sections briefly describe each area.

### *Staffing—The Reasons for Using Expatriates and the Origin of Expatriates*

Edström and Galbraith (1977) identified three reasons why companies send expatriates on international assignments: (1) to fill positions when there is a skill gap in the location, (2) for management development purposes, and (3) for organizational development. While the emphasis may have shifted somewhat from filling a skill gap to management development (Adler & Bartholomew, 1992), all three reasons still pertain today

Traditionally, only parent-country nationals were sent to fill expatriate positions. As companies have become more international, the role of expatriates from other countries (third-country nationals) has been increasing. Various researchers have also emphasized the growing importance of bringing “inpatriates” (i.e., employees from other countries), to company headquarters (e.g., Novicevic & Harvey, 2001). In recent years, assignments have become shorter, and new categories of expatriates have emerged, such as “commuter” and “frequent flier” executives (Harris & Petrovic, 2000) and “international itinerants” (Banai & Harry, 2004).

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### *Selection Practices*

Research on the selection of expatriates has mainly concentrated on selection criteria, with technical expertise and domestic track record typically cited as most important (Brewster & Scullion, 1997). Harris and Brewster (1999), however, found that most companies did not follow a systematic procedure in their selection. Although the number of women expatriates is increasing (Brewster & Hegewisch, 1994; Tung, 1998), research shows that their proportion to the number of men in the expatriate population is still low (Adler, 1986; Florkowski & Fogel, 1999; Linehan, Scullion, & Walsh, 2001). In 1999, for example, Caligiuri, Joshi, and Lazarova

reported that 12 to 15% of expatriates were female. Because of the growing number of female expatriates, and because more and more married women work and want to carry on their career while accompanying their husband on an assignment, the “dual-career phenomenon” has become one of the biggest issues companies have to face when selecting expatriates (Harris, 1995; Harvey, Buckley, Novicevic, & Wiese, 1999).

### *Training*

Cross-cultural training has been widely accepted as having a positive effect on expatriates’ performance (e.g., Black & Mendenhall, 1990; Caligiuri, Phillips, Lazarova, Tarique, & Bürgi, 2001; Eschbach, Parker, & Stoeberl, 2001). During the 1980s, companies did not often provide their expatriates with such training (Black & Mendenhall, 1990; Mendenhall, Dunbar, & Oddou, 1987). Fortunately, in recent years companies have started to recognize the importance of cross-cultural training, and there is an increase in providing it for the employees (see, e.g., Windham International & National Foreign Trade Council, 1998). According to the Windham/NFTC study, 70% of companies reported that they provide at least one day of training for employees going on expatriate assignment. However, even when companies offer cross-cultural training, they often fail to involve the spouse/partner in either the selection process or predeparture training (Gates, 1994; Mendenhall et al., 1987), even though research has shown that the most often quoted reason for premature return is the spouse’s inability to adjust to the foreign environment (Black & Gregersen, 1991).

### *Success of Expatriate Assignments*

Researchers studying the measurement of expatriate performance have pointed out the numerous difficulties related to doing so, including external influences, noncomparability of data between subsidiaries, and the challenge of finding a team of evaluators that can consider the objectives set by the home operation as well as the local circum-

stances (Black, Gregersen, & Mendenhall, 1992). The operationalization of success in expatriate assignments has proven a difficult task, and different researchers have used different constructs to measure it. To date, failure rate (measured by the occurrence of premature return) has been one of the most widely used. Although numerous references can be found to high premature return rates, Harzing (1995) concluded in her in-depth analysis of previous research that there had been no reliable large-scale multicountry empirical work on this subject for more than 15 years. Nevertheless, there was general agreement that American companies had higher premature return rates than either their Japanese or European counterparts (Harzing, 1995; Tung, 1982). More recent research (Peterson et al., 2000; Tung, 1998), however, suggests that U.S. failure rates have been reduced significantly.

The rate of premature return, however, shows only one type of failure. It does not include failing expatriates leaving the company while on the assignment, and most important, it does not include expatriates who complete their full term but fail to perform well. The losses that may occur when a company does not pull an expatriate out of a location include failed projects, lost business, damage to customer relations, and possible disruption of the local office (Zeira & Banai, 1984). The individual also incurs personal costs, such as possible damage to career, stress, potential health problems, and conflicts in the family. To address the complexity of measuring the success of expatriate assignments, Caligiuri and Tung (1999) suggested the use of a three-faceted construct: (1) premature termination of the assignment, (2) cross-cultural adjustment, and (3) actual job performance on the assignment.

## The Research Study

### *Scope of the Study*

The research project aimed to cover a broad range of expatriation issues. MNCs were asked to describe their current expatriate

management policies and practices and, in some cases, their intentions for future practice. The areas of inquiry included the perceived importance of foreign assignments for future executives, company guidelines for expatriate management, the profiles of expatriates and foreign assignments, selection criteria and methods, training and other support before and during the assignments, appraisal, repatriation and career prospects, and premature return rates and the reasons behind them. In addition, we gathered company-specific information that included business sector, annual sales, nondomestic revenues, and the total number of employees worldwide.

### *The Sample*

Our aim was to approach large companies because they were likely to have the most sophisticated practices. We chose Germany, Japan, the United Kingdom, and the United States as home countries for MNCs because they hosted the majority of the world's top companies measured by revenue ("The Global 1000," 2000). In addition, the four countries have significantly different cultures (see, for example, Hofstede, 1994a, 1994b; House et al., 2004; Trompenaars, 1993) and thereby provided a good basis for investigating whether and how national cultures influenced expatriate policies and practices. Although the U.K. and U.S. cultural dimension scores were somewhat similar, we included both countries because (1) they were among the countries with the biggest MNCs, and (2) we wanted to have more than one European country in the sample, particularly since Tung's (1982) research contained the three main geographical areas of Japan, the United States, and Western Europe. To compare our study with Tung's (1982), in this article we report the combined results of Germany and the United Kingdom as "Europe."

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We determined the companies' size based on latest sales figures or, in the case of financial institutions, total assets. First, we compiled a database based on the listings of the article "The Global 1000" (1996). Our aim was to identify approximately 150 large MNCs in each country. To reach these numbers and to eliminate companies with no international operations, we used additional sources, such as the *Amadeus* online database for the United Kingdom, *Germany's Top 500*

We deemed mail survey the most appropriate data-collection method for this study because (a) the majority of the questions were fact-based, and (b) the large number and geographic diversity of the companies included in the research precluded interviewing as a primary collection method.

(1996) for Germany, a financial database for Japan, and a hard-copy listing of the biggest American companies (Press Reference, 1996) for the United States. The resulting sample included 154 German, 139 Japanese, 125 U.K., and 161 U.S. companies.

### Questionnaire Design and Administration

We deemed mail survey the most appropriate data-collection method for this study because (a) the majority of the questions were fact-based, and (b) the large number and geographic diversity of the companies included in the research precluded interviewing as a primary collection method. We followed this process: after performing an extensive literature review, we consulted research colleagues and conducted six elaborate interviews with HR professionals of MNCs represented in London (though not all were headquartered in the United Kingdom). These interviews were to gain background

information and to identify which expatriation issues business executives perceived as most important. Based on the topics listed earlier and taking into account the results of these interviews, we then drafted a questionnaire to be sent in English to American and British MNCs, in German to German MNCs, and in Japanese to Japanese MNCs. We began by drafting the English-language

questionnaire. A British and an American HR researcher tested it for clarity, language, and cultural ambiguity. Based on their comments, we changed the wording of a few questions slightly. The first author, who speaks both English and German fluently, prepared the German questionnaire and then tested it with two German speakers, again for clarity, language, and cultural ambiguity. As the result of this process, some minor changes were made. Lacking the necessary Japanese-language knowledge, we used the iterative process of translating, back-translating, and adjusting (Brislin, 1976) for the Japanese questionnaire. First, a Japanese expatriate translated the English questionnaire into Japanese. Following this, a second Japanese person translated it back from Japanese into English. By comparing the two English versions, we made some changes in the style of the cover letter as well as in the style of some of the questions. We also made some changes to clarify the content of a few questions. Following this, we tested the questionnaire with a third Japanese person. No further changes were necessary.

Rating questions were predominantly in the form of 6-point Likert scales; the majority were ordinal scales. We used 6-point scales to force a choice, usually between "never/rarely/sometimes" and "often/very often/always" when referring to the use of particular practices. The remaining questions asked for category variables and percentages.

To facilitate a good response rate, we identified the vice president of HR (or equivalent) from published documents or through a telephone inquiry. We designed the survey to be completed by one individual in each company, which we deemed adequate since the majority of the questions asked for objective responses. We chose the vice president of HR since the person in this position was the most likely to be familiar with the information we asked for in the survey; however, we also asked respondents to pass the survey to the official in charge of expatriate policy (if such a position existed in the company).

## The Respondents

In total, 140 companies returned completed questionnaires; 136 were valid, including 35 German, 20 Japanese, 34 U.K., and 47 U.S. responses. This corresponds to an overall response rate of 23.5% with variations between the countries: Germany, 22.7%; Japan, 14.4%; the United Kingdom, 27.2%; and the United States, 29.2%. Respondents from the industrial sector included 62.9% of the Germans, 65% of the Japanese, 54.8% of those from the United Kingdom, and 63.8% of those from the United States; the remainder belonged to the services sector. Overall, 21.6% of the respondents had fewer than 10,000 employees worldwide; 32.1% had 10,000 to 30,000 employees; and 46.3% had more than 30,000 employees (the latter group constituted 73.9% of U.S. respondents). As a follow-up, we telephoned approximately 30 companies to find out the reasons for their nonresponse. In a few cases, the MNCs were undergoing significant organizational changes, and they did not wish to complete the questionnaire; in the majority of the cases, however, it was company policy not to respond to any surveys. Other than the response rates across countries listed above, there were no significant differences between respondents and nonrespondents along the criteria used to select target companies.

## Analysis Performed

Because a number of factors may affect expatriate management policies and practices, we first examined the effects of (a) country, (b) industrial sector, (c) company size, (d) percentage of foreign revenue, and (e) number of expatriates in the company on each of the practices detailed in the questionnaire. Multivariate analyses showed that the country effect was the most significant across practices. We generated univariate statistics (analysis of variance [ANOVA] and chi-squared tests) to determine similarities and differences between the German, Japanese, U.K., and U.S. MNCs' expatriation patterns. We also performed post hoc Scheffé tests to identify which countries had sig-

nificantly different practices. It has been suggested that East Asian cultures tend to use the middle point of Likert scales more often than other cultures. We found that our Japanese sample did not use the mid-points more frequently than the other three samples when responding to questions that included Likert scales; therefore, we did not standardize the scores.

## Results and Discussion: Have Expatriate Management Practices Changed in the Last Two Decades?

We report our findings in the subsections that follow. These are followed—where applicable—by comparison with the results of Peterson et al. (research conducted at the beginning of the 1990s) and with those of Tung (from the 1980s). We report Tung's results mostly in aggregate form, combining results across the four job categories she studied. At the end of each subsection we evaluate, for that particular category of expatriation practices, whether any convergent or divergent patterns appear.

### Staffing

#### Why Do Companies Use Expatriates?

Table I presents the ratings of 12 reasons for using expatriates in managerial positions. The results show big variations among the countries. The most important category in Germany, for example, was "to develop international management skills." In Japan and the United Kingdom, it was "to set up a new operation," and in the United States it was "to fill a skill gap."

Comparing these results with Tung's findings (1982), in the United States we find the same two reasons for sending parent-country nationals to foreign operations ("starting up a new operation" and "to fill a skill gap") as being most important; only the order of im-

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*Other than the response rates across countries listed, there were no significant differences between respondents and nonrespondents along the criteria used to select target companies.*

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**TABLE I** Reasons for Filling Managerial Positions With Expatriates

	Germany	U.K.	Japan	U.S.	Total	N	F	p(F)
To set up a new operation	4.70	5.13	5.21	5.25	5.07	126	1.77	ns
To fill a skill gap	4.18	4.83	4.68	5.33	4.82	127	8.68	***
To develop international management skills	4.91	4.77	4.11	4.53	4.63	125	3.62	*
To train and orient local staff	4.41	4.57	4.32	4.61	4.50	127	0.50	ns
To control the operation	4.00	4.07	4.61	4.53	4.29	124	2.47	ns
To ensure the same company standards worldwide	4.48	4.00	3.56	4.43	4.22	124	2.79	*
To coordinate with headquarters	4.12	3.80	4.68	4.16	4.14	126	2.06	ns
To provide career development opportunities	4.03	4.53	3.41	4.23	4.14	124	4.71	**
To establish and maintain corporate culture	4.09	3.83	3.74	4.14	3.99	126	0.74	ns
To learn about local business practices	4.30	3.90	4.11	3.60	3.94	124	3.10	*
To maintain the image of the operation as "foreign"	3.15	1.90	2.72	1.91	2.35	124	11.74	***
To find jobs for surplus managers	1.88	1.60	1.72	1.68	1.72	125	0.64	ns

Each item was rated on a 6-point scale (1 = very unimportant to 6 = very important).

\* $p < .05$

\*\* $p < .01$

\*\*\* $p < .001$

portance of the reasons has changed over the two decades. In Tung's study, in addition to these two reasons, the Western Europe sample also mentioned "management development" as one of the most important reasons. Our study showed similar results, as "to develop international management skills" along with "to set up a new operation" were among the three most important criteria in both Germany and the United Kingdom. But whereas Tung had concluded that Japanese companies did not consider any reason important other than "parent-country nationals are the best persons for the job," in our study Japanese MNCs gave four reasons as "very important" for using expatriates: "to set up a new operation," "to fill a skill gap," "to coordinate with the headquarters," and "to control the operation."

### Origin of Expatriates

The flow of expatriates was largely in one direction (Table II). Overall, most expatriates were parent-country nationals sent on foreign assignments from their headquarters. The make-up of expatriates in the individual countries, however, varied. Japanese firms used significantly more parent-country nationals (98.8%) than any other country, and Germany (79.4%) used significantly more than the United Kingdom (55.9%). According to the present study, U.K. companies seem to be the most open to using third-country expatriates (37.5%), while—as in the past, too—Japanese MNCs showed the biggest reluctance, by employing a mere 0.5% third-country expatriates. The overall percentage of inpatriates was 7.4%, with the

**TABLE II** The Origin of Expatriates

	Germany	U.K.	Japan	U.S.	Total	N	F	p(F)
Parent-country nationals	79.42%	55.90%	98.76%	67.41%	71.72%	121	12.28	***
Third-country nationals	11.86%	37.45%	0.47%	23.11%	20.92%	121	11.74	***
Expatriates in the headquarters	8.72%	6.65%	0.77%	9.48%	7.36%	121	4.44	**

\*\* $p < .01$

\*\*\* $p < .001$



Japanese companies reporting a significantly lower rate (0.8%) than their Western counterparts.

Peterson et al. (2000) found similar usage levels for different types of expatriates. They concluded that in Japanese companies, “there is little use of either inpatriates . . . or third-country nationals.” In German companies, they found a “fairly low use of inpatriates and third-country nationals.” Because of the similarities they found, Peterson et al. grouped the American companies with the British ones. In these companies, they found a “broader use of inpatriate and third-country nationals.”

Our results, as well as those of Peterson et al. (2000), are similar to Tung’s (1982), who also reported that Japanese companies employed considerably more parent-country nationals than companies of other nationalities. Two decades ago, U.S. MNCs seemed to make the most use of third-country nationals, while Japanese companies did not use any third-country nationals, except in Africa.

### A Pattern of Change?

Can we see any convergence in the reasons for using expatriates and in the expatriate make-up? To see the current similarities and differences among the countries, we compared the five most important reasons for using expatriates in each of the four countries in our study. Only two items—“to set up a new operation” and “to train and orient local

staff”—were mentioned by all countries among the five most important reasons. Overall, then, the reasons for using expatriates are largely still divergent across countries. We did notice, however, some convergence between the Japanese and the Western companies. In the present study, Japanese companies also mentioned reasons for using expatriates that previously only Western companies had given. While we believe this is a sign of some convergence, further research is necessary to support it. In particular, although the reasoning Japanese MNCs offer seems to have converged to that of the Western group, the overwhelming majority of Japanese expatriates are still parent-country nationals—that is, the make-up of expatriates is just as different now as it was two decades ago. As for Western Europe and the United States, there has been an increase in the number of third-country nationals, but there is no evidence that the countries’ practices have come closer to one another.

### Selection Methods

In our study, Germany, the United Kingdom, and the United States (Table III) showed a similar regularity in conducting structured interviews, using references, and self-nomination; Japanese firms used the latter two methods significantly more regularly ( $p < 0.000$ ) and conducted structured interviews significantly less often ( $p = 0.006$ ). The German, Japanese, and U.S. MNCs

**TABLE III** Regularity of Using the Following Selection Methods

	Germany	U.K.	Japan	U.S.	Total	N	F	p(F)
References	3.75	3.42	5.30	3.62	3.89	123	12.44	***
Structured interviews	4.06	4.19	2.55	4.04	3.84	126	6.01	***
Self-nomination	3.00	3.31	4.95	3.13	3.42	125	19.80	***
Cultural awareness assessment	3.30	2.13	4.05	2.16	2.76	116	11.77	***
Behavioral assessment	2.58	1.91	1.68	1.37	1.85	116	8.43	***
Psychological tests	1.48	2.63	1.68	1.59	1.79	116	7.17	***
Cognitive tests	1.70	2.30	1.79	1.52	1.77	116	2.76	*

Each item was rated on a 6-point scale (1=never to 6=always).

\* $p < .05$

\*\*\* $p < .001$

hardly ever used cognitive and psychological tests. Although U.K. companies used psychological tests significantly more often than the MNCs of other nationalities, their overall usage was low. Companies also made very little use of behavioral assessment, even though Germany showed a significantly higher use than the United States and Japan ( $p < 0.000$  and  $p = 0.036$ , respectively). Regarding cultural awareness assessment, there were two distinctly different groups, with Japan and Germany using this method most often (but still only “fairly often” and “sometimes,” respectively).

At the beginning of the 1980s, 3% of the U.S., 5% of the Japanese, and 14% of the Western European firms measured the candidate’s technical competence in some way. The candidate’s relational abilities were assessed by 5% of the U.S. and 21% of the Western European MNCs. None of the Japanese companies reported such an assessment; furthermore, Japanese MNCs interviewed a smaller percentage of candidates than their counterparts.

Since partners play a crucial role in expatriates’ success, we also asked whether the MNCs in any way evaluated a partner’s suitability for the assignment. There were no significant differences among the countries here. Overall, companies tended to leave the decision up to the expatriate; very rarely did they make an attempt to evaluate the partner’s suitability; 13.6% of the U.S. respondents, however, noted that this assessment was performed at least in part through cultural training.

Two decades ago, Tung’s study showed that almost half of the U.S. and about 40% of the Western European sample interviewed the spouse as part of the selection process, while none of the Japanese companies did.

### A Pattern of Change?

It appears that not much has changed in the use of selection methods since Tung’s (1982) study. Although the overall usage of structured interviews seems to have decreased somewhat, the differences among the countries still hold. Then, as well as in the present

**TABLE IV** Regularity of Using the Following Selection Criteria

	Germany	U.K.	Japan	U.S.	Total	N	F	p(F)
Technical/professional skills	4.50	5.75	5.55	5.43	5.28	130	15.07	***
Expatriate’s willingness to go	5.42	5.28	5.05	5.09	5.22	129	1.60	ns
Experience in the company	5.27	4.94	5.65	5.13	5.20	131	3.67	*
Personality factors (e.g., open mind, flexibility, resilience)	5.16	5.13	5.47	4.24	4.87	126	9.54	***
Leadership skills	5.06	4.66	5.11	4.78	4.87	130	2.09	ns
The ability to work in teams	5.19	4.84	5.20	4.47	4.85	129	5.32	**
Previous performance appraisals	4.91	4.34	5.17	4.76	4.75	128	2.88	*
Family’s willingness to go	4.66	4.69	3.32	4.42	4.38	128	5.45	***
Educational qualifications	4.58	4.09	3.89	3.98	4.15	128	2.04	ns
Previous international experience	3.88	4.03	4.67	3.72	3.96	128	3.26	*
Language proficiency	4.39	3.47	5.22	3.11	3.83	128	22.23	***
Loyalty to the company	4.58	3.26	4.11	3.07	3.67	125	10.05	***
Knowledge of new locality	3.30	3.23	4.32	2.89	3.29	128	9.35	***
Age	3.45	2.78	4.84	1.78	2.91	129	57.91	***
Gender	2.69	2.10	3.89	1.70	2.38	126	19.20	***

Each item was rated on a 6-point scale (1=never to 6=always).

\* $p < .05$

\*\* $p < .01$

\*\*\* $p < .001$

sample, the European and U.S. MNCs conducted more structured interviews than the Japanese firms, and it is still the European companies (the United Kingdom with psychological tests and Germany with behavioral assessment) that seem to test most often the expatriates' relational abilities. Based on these findings, no convergence in selection methods could be concluded.

### Selection Criteria

The reasons for using expatriates varied considerably across the four countries and so did the most regularly used selection criteria in our study (Table IV). In Germany, the most important criterion was "the expatriate's willingness to go," in Japan the "experience in the company," and in the United Kingdom and in United States the "technical/professional skills." Furthermore, "technical/professional skills," "experience in the company," "the expatriate's willingness to go," and "leadership skills" all received a "very important" score in each country, as did "personality factors" and "the ability to work in teams" in Germany, the United Kingdom, and Japan. "Previous performance" also scored "very important" for all countries but the United Kingdom.

The above findings broadly match the results of Peterson et al. (2000). They reported that U.K. and U.S. companies staffed expatriate positions primarily based on technical and professional skills, interpersonal skills, and management development.

Combining the findings for all job categories in Tung's study, "adaptability/flexibility" and "communication" were the most important selection criteria in the United States, and "managerial talent" and "techni-

cal knowledge" in the Western European and the Japanese samples. Although not the top criterion, both the Western European and Japanese MNCs nevertheless considered "adaptability/flexibility" as "very important." In addition, "interest in work" in the Western European and "experience in the company" in the Japanese MNCs were also among the "very important" criteria.

### A Pattern of Change?

It appears that at present there are more criteria companies consider "very important" than there were at the beginning of the 1980s. Specifically, "experience in the company" seems to have gained the most importance as a selection criterion. This increased number of selection criteria could be an outcome of the companies' growing expertise in handling expatriate assignments. However, while the number of selection criteria has increased, their relative importance is still highly variable. Comparing the four countries' results, we found remarkable the extent of variation among them. The countries showed significant differences in 12 of the 15 criteria examined, and in 8 (i.e., in more than half of the cases) the significance was  $p < .000$ . Given these results, we conclude that, at least for the present, there is little or no convergence in the area of selection criteria

### Training

The current findings show that in combining cultural and language training, the Japanese companies provided the most training overall (Table V). While all of the countries' companies provided country-specific cross-cultural training for expatriates with the

**TABLE V** Regularity of Predeparture Training Provided for Expatriates

	Germany	U.K.	Japan	U.S.	Total	N	F	p(F)
Language training	4.60	3.79	5.05	4.26	4.35	134	5.20	**
Country-specific cross-cultural training	3.37	3.27	4.25	4.27	3.78	132	4.09	**
General cross-cultural training	2.49	2.97	4.85	4.13	3.50	125	15.55	***

Each item was rated on a 6-point scale (1=never to 6=always).

\*\* $p < .01$

\*\*\* $p < .001$

same frequency (“sometimes” to “fairly often”), the Japanese and U.S. companies significantly more often provided general sensitivity training than the German and the U.K. MNCs ( $p < 0.000$ ). The training most often offered was overwhelmingly language training, with Japan providing the most and the United Kingdom the least. Japanese survey respondents’ comments indicated that the language training often meant learning English rather than the language of the country of the assignment.

Peterson et al. (2000) reported that in Japanese companies the “predeparture training is fairly comprehensive”; in the U.K. and U.S. companies, they found a “relatively poorer use ... of predeparture training of expatriates.”

In Tung’s (1982) study, 69% of the Western European, 57% of the Japanese, and 32% of the U.S. companies provided expatriates with some kind of predeparture training.

#### A Pattern of Change?

Based on these findings, Western European companies appear to have decreased their training since Tung’s study (1982). In fact, according to the present study, they not only provided less training than their Japanese counterparts, but they also had been overtaken by the U.S. MNCs. Although there have been shifts as to which countries provide the most or least training, there is no evidence that the four countries’ training practices have converged.

#### Success of Expatriate Assignments

The survey inquired about the MNCs’ expatriation failure rate measured by prema-

ture return. No significant statistical differences were found among the four countries; the overall premature return percentage was a relatively low 6.3%. To be able to compare the present findings with those of Tung (1982), we also analyzed our data following the structure in which Tung reported her results (Table VI). The table shows where the similarities and differences lie. Two decades ago, U.S. companies reported much higher premature return rates than their Western European or Japanese counterparts. The most startling difference is that in the earlier findings only 24% of the U.S. companies signaled lower than a 10% failure rate; in the present study, this percentage is 86.3%. The picture does not seem to have changed in Western Europe, even if the recent data show a few companies reporting failure rates above 20%. No real changes other than perhaps a slight overall improvement could be seen in the case of the Japanese companies.

We also asked respondents to identify the reasons for premature returns (Table VII). There were no significant differences among the countries, and none of the reasons listed in the survey received a higher rating than “sometimes.”

In Tung’s study, both the U.S. and the Western European samples reported “the inability of the manager’s spouse to adjust to a different cultural or physical environment” as the most important reason for the expatriate’s premature return or poor performance. In the Japanese companies, the most important reason was “the inability of the manager to cope with the larger responsibilities posed by the overseas work.”

**TABLE VI** Comparison Between Failure Rates in Tung’s Study and the Present Study

Premature return rate	Tung Western Europe	Germany (N=32)	U.K. (N=30)	Tung Japan	Japan (N=18)	Tung U.S.	U.S. (N=44)
Less than 10%	97.00%	90.60%	93.40%	86.00%	94.40%	24.00%	86.30%
More than 10 but less than 20%	3.00%	0.00%	3.30%	14.00%	0.00%	69.00%	2.30%
Equal to or more than 20%	0.00%	9.40%	3.30%	0.00%	5.60%	7.00%	11.40%

**TABLE VII** Reasons for Premature Return

	Germany	U.K.	Japan	U.S.	Total	N	F	p(F)
Operational reasons	3.50	3.73	3.14	3.03	3.33	96	1.30	ns
Poor performance in the job	3.00	2.32	2.50	2.97	2.77	91	1.61	ns
Employee's family could not adapt to local circumstances	3.00	2.37	2.29	2.68	2.64	92	1.54	ns
Employee could not adapt to local circumstances	3.08	2.42	2.43	2.46	2.62	94	1.63	ns
Other family-related problems	2.17	2.65	2.36	2.48	2.41	85	0.67	ns

Each item was rated on a 6-point scale (1 = never to 6 = always).

### A Pattern of Change?

The shift in the U.S. premature return rates may be a sign of improvements taking place in the United States. As U.S. companies have started to apply more elaborate selection criteria and to provide an increased amount of training, these changes could be leading to the improvement in premature return rates. This finding corresponds to both Tung's later (1998) study of 409 American expatriates and Peterson's (2003) finding that "the percentage of American expatriates who returned early [was] much lower" than that found by Tung (1982). Thus, we might tentatively conclude that the four countries show a converging picture based on their rates of premature return as well as their reasons for premature returns.

### Managerial and Human Resource Implications

In the following we discuss the practical managerial implications of our results. We also share some further findings in order to widen the database of the discussion on expatriate practices in general.

#### *Changes in Staffing*

At the initial stages of international expansion, companies tend to use mainly parent-country expatriates. However, with growing internationalization, MNCs have to give more space to non-parent-country expatriates. This seems to be the trend among the companies participating in the current re-

search as well. Third-country nationals are said to have the advantage (over parent-country nationals) of being more familiar with the surrounding cultures and often of being less expensive. According to our results, the more internationalized companies were (measured by the percentage of their nondomestic turnover), the more third-country nationals they had among their expatriates. The other trend in expatriate management is the increase of inpatriates—that is, employees brought to the headquarters or, in the case of a growing number of companies, to several headquarters. This practice can enhance knowledge transfer within the company, help to spread and maintain the corporate culture and standards worldwide, and ultimately is likely to lead to a workforce with a more global mind-set.

In our study, the overall female expatriate rate was 7%, with the U.S. companies reporting 11% and the Japanese reporting 0.4%. There was also a big difference between the services (11%) and industrial sectors (4%). With the growing number of female expatriates and dual-career couples, companies will have to find innovative ways of dealing with accompanying spouses.

#### *Selection Methods*

One of our inquiries was whether MNCs worked with a worldwide database of potential expatriates that would ideally include information about the candidate's personal background, expertise, experience, potential, and willingness to consider an assignment in

different parts of the world. In our study, only Japanese companies reported making regular use of such a database. However, because the overwhelming majority of their expatriates was Japanese and generally kept very close contact with the firm's headquarters, it was likely an easier task for Japanese companies to create and update a worldwide database than it would be for their counterparts of different nationality. Nevertheless, because of the ever more varied origins of expatriates, it may become more and more important for MNCs to establish such data-

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*We would like to suggest that from the company point of view, expatriate assignments are only really successful if the expatriate's knowledge and experience are further utilized for the company's advantage after the assignment.*

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bases. Present-day technology, including the use of intranets, is making this task easier. Many of the executives we have taught in recent months have reported efforts to build expatriate management systems—some with central control and others with broad access. For such a system to function efficiently, communication among HR managers (and very likely others) in various parts of the world would have to be regular and effective. Selection methods may also have to be adjusted because of the increase in the number of "alternative" models to expatriation, such as commuting, short-term, and frequent flying assignments (Harris & Petrovic, 2000). Companies will have to work out more sophisticated approaches to staffing all different kinds of foreign assignment positions.

### ***Selection Criteria***

Today, companies seem to be using a wider range of selection criteria than they did two decades ago. We, along with many managers we have worked with, welcome this change because the inclusion of more professional, personal, and psychological characteristics should give companies a better chance to identify appropriate candidates for jobs abroad. Here we would like to draw attention to two country-specific findings

where some action may be called for. First, in our study, only Japanese companies did not count among their five most important criteria "the expatriate's willingness to go"—perhaps because Japanese employees have traditionally been expected to automatically fulfill any role the company assigned to them. However, as business practices (including the security of lifetime employment) change in Japan, companies should pay more attention to this criterion. Second, open-mindedness, flexibility, and perseverance are widely believed to be crucial for expatriate success. Yet, criteria related to these characteristics were not among the most important selection criteria in the U.S. companies. In fact, U.S. MNCs scored the lowest in the categories "personality factors" and "the ability to work in teams." This is an even more surprising finding; in Tung's study (1982), very similar categories—"adaptability/flexibility" and "communication"—were the most important criteria in the United States, and in Peterson et al.'s (2000) study, interpersonal skills were also among the most important. If indeed our results are representative of current U.S. business practice, U.S. executives should take good note of this shift and find ways to address it.

### ***Training***

When we asked the companies that did not provide cross-cultural training why they chose not to do so, the overwhelming response was "due to lack of time." We hope this attitude is changing (see, for example, Windham International & National Foreign Trade Council, 1998). However, in addition to the amount of training given, the content may also need adjustment. Although it may be debated whether the overall number of expatriates in companies is likely to increase or decrease (see Peiperl & Jonsen, 2007, for one projection), the expatriates' background is undoubtedly becoming more varied. With the changing nature of expatriates' origins (and other characteristics, such as age and gender), HR and training professionals will have to

work out more tailored approaches for the different groups. Inpatriates, for example, will most likely need different language and cross-cultural training than parent-country nationals. Also, as the number of employees coming from developing countries increases, there may be more need for extra business/management training. In our study, a few firms reported using a contingent approach (suggested by Tung, 1981) in selection and training. Examples include basing the selection criteria on “the requirements of the job and the nationality” and basing the language requirements on “no general rule” but making them dependent “on the location and the assignment.” A number of MNCs offer longer training for assignments in those countries where there is a particularly big cultural difference between the home and the new location (Western MNCs mentioned China most often as an example).

### Success

At first, an average of 6.3% may not sound like a very high failure rate. The fact that MNCs did not give typical reasons for premature return may indicate that they did not know the reasons for failure or perhaps did not deem the overall failure rate of 6.3% low enough to investigate the reasons further. This would be somewhat surprising, however, given how expensive expatriates are. The 57 MNCs that answered the question “Please give your best estimate as to how much one premature return typically costs your company,” reported an average of US \$198,000. We asked for the estimate as an open question because we were curious to learn what expenses companies would include in this calculation. The two expenses most often mentioned were those related to moving and to finding a successor. Only 20% included “increased tax payments due to interruption of the stay in the country,” and only 18% of the companies added salaries to the calculation. Only a few respondents mentioned “lost housing rent and furniture rental costs,” “penalty payments for early exit from rented accommo-

dation,” and “lost prepaid schooling tuition/expenses.” None of the MNCs attempted to include less tangible costs, such as disruption to projects, loss of business, and so on.

If we had the data to be able to discuss performance as Caligiuri and Tung (1999) suggest—that is, by considering premature returns, cross-cultural adjustment, and actual performance on the job—the damage would certainly be higher than what is suggested by a simple premature return rate of 6.3%. The challenge for HR professionals is to develop a company-specific and perhaps even region-specific evaluation system that can objectively assess expatriates’ performance on all its significant dimensions.

We would like to suggest that from the company point of view, expatriate assignments are only really successful if the expatriate’s knowledge and experience are further utilized for the company’s advantage after the assignment. This could be done in the expatriate’s next job within the company and/or by capturing the expatriate’s knowledge and disseminating it. From the individual point of view, however, the criteria for success are often very different. Stahl et al. (2002) pointed out that expatriates seem to be changing. For example, while expatriates may leave their companies soon upon repatriation, they don’t necessarily look at this change as a failure. Instead, many of them are likely to follow the notion of the “boundaryless career” (Arthur & Rousseau, 1996; Stahl et al., 2002) and accordingly join another company by taking up a role that may fit their newly acquired skills better. These changes should alert companies to take more initiatives to capture their expatriates’ knowledge, where possible, and to seek more ways of motivating them to stay in the firm (or, at least, to stay well connected to the firm) after expatriate assignments.

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*In the future, we do expect that Japanese and Western practices will converge somewhat, with the Japanese companies at times converging toward the Western, and perhaps the Western companies moving at other times toward the Japanese practices.*

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## Conclusions and Implications for Future Research

In this article, we presented a comparative analysis of expatriate management practices and policies of large MNCs based in four different countries and examined the changes taking place over time in several areas of expatriation. Comparing the findings with those of Tung (1982) and partially to those of Peterson et al. (1996, 2000), the biggest change we observed was the decline in U.S. companies' premature return rates. Further changes were the overall increased number of selection criteria (although there were very different criteria across countries), the Japanese companies' similar reasons for using expatriates to those of Western companies, and the fact that none of the four countries' companies gave strong reasons for premature returns. We view this latter finding, however, more as a concern rather than as a sign of convergence. We have also seen some shifts in the countries' expatriation policies (e.g., the number of third-country national expatriates is increasing, and there has been a shift among countries as to which one provides more training); these shifts, however, do not necessarily indicate convergence. The fact that 70% of the 44 variables in the areas of staffing, selection, and training included in the study showed significant differences

( $p < 0.05$ ) across countries argues against an overall convergence in expatriate practices.

In the future, however, we do expect that Japanese and Western practices will converge somewhat, with the Japanese companies at times converging toward the Western, and perhaps the Western companies moving at other times toward the Japanese practices. Other studies also suggest such a trend, although important differences still exist. As part of the Best International Human Resource Management Practices Survey project, Huo, Huang, and Napier (2002) looked both at the "is now" and the "should be" cases. Although they identified many cross-national differences, based on the "should-be" data, they suggest that "the trend toward convergence seems to be irresistible" (p. 42). This is, of course, a normative rather than a descriptive conclusion. As von Glinow et al. (2002) put it, "the future universal trends emphasize 'West meets East.' "

To be able to test the results of the present article and to more fully develop our understanding of the possible convergence or divergence of expatriation practices, we need to perform replication and/or longitudinal studies. The present survey hopes to be one in a series of future studies that will show in which direction expatriate, and, more broadly, cross-national management, practices develop.

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