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THE FRENCH EXPATRIATE ASSIGNMENT:
HELPING ACCOMPANYING SPOUSES
TO ADAPT BY ASSUMING THE ROLE
OF ANTHROPOLOGIST

by

Angela M. Williams

A thesis submitted to the faculty of

Brigham Young University

in partial fulfillment of the requirements for the degree of

Master of French Studies

Department of French and Italian

Brigham Young University

December 2004

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BRIGHAM YOUNG UNIVERSITY

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This thesis has been read by each member of the following graduate committee and by majority vote has been found to be satisfactory.

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As chair of the candidate's graduate committee, I have read the dissertation of Angela M. Williams in its final form and have found that (1) its format, citations, and bibliographical style are consistent and acceptable and fulfill university and department style requirements; (2) its illustrative materials including figures, tables, and charts are in place; and (3) the final manuscript is satisfactory to the graduate committee and is ready for submission to the university library.

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ABSTRACT

THE FRENCH EXPATRIATE ASSIGNMENT: HELPING ACCOMPANYING SPOUSES TO ADAPT BY ASSUMING THE ROLE OF ANTHROPOLOGIST

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Department of French and Italian

Master of French Studies

A common practice of multinational companies is to temporarily transfer employees to international locations in order to exchange technology, launch new ventures, and facilitate communication within the company. To do this, multinational companies must make a number of decisions regarding their expatriate programs. Even though international companies would rather stay focused on the professional performance of their employees without having to “meddle” in personal and family affairs, recent research has shown that the adaptation of the accompanying spouse is one of the most critical factors in expatriate assignment success or failure. By studying the available literature on expatriate spouse adaptation, coupled with conducting my own exploratory research with American expatriate spouses currently living in France, I was

led to the conclusion that adequate, *pre-departure* preparation is indispensable to an expatriate spouse's successful cross-cultural adaptation. To improve the efficacy of pre-departure training, I propose providing expatriate spouses with personal trainers who will teach them to adopt a new mindset for the purpose of conducting cultural analysis. This mindset involves assuming the role of anthropologist—just as an actor would assume a role in a play. The benefits of this approach are twofold: firstly, imagining oneself as an anthropologist provides excellent motivation to get out and explore a new culture rather than avoiding it and hiding out in the safe haven of one's own home; secondly, having a new, temporary identity will help create the emotional distance necessary to minimize reactionary, negative feelings and allow for progressive, cross-cultural understanding. While being sensitive to prospective expatriate spouses' personal goals, personal trainers should provide concrete methods to help mitigate culture shock's related stresses, as well as helping expatriate spouses develop appropriate coping skills to assist them in dealing with the unsettling experience of living in another culture. By implementing improvements in relocation programs, such as the solution I propose, multinational companies can maintain an acceptable return on investment for their relocation programs while affording expatriate employees and their respective families an enriching and life-changing intercultural experience.

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I am grateful for my father's adventuresome spirit which led my family to accept an expatriate assignment to France, fifteen years ago. I would like to give special thanks to my mother who was the inspiration behind my thesis research. Her courage and perseverance carried my family through the struggles of expatriate life and made our sojourn a beautiful experience.

I am grateful to all of the expatriate spouses who so willingly participated in my study. Especially, I would like to thank those who went the extra mile by referring me to their friends and providing me with contact information. I am particularly grateful to the kindness of a research participant who offered me room and board so that I could conduct more interviews the following day. My research is also indebted to Polly Platt who opened up her home to me for a wonderful internship experience. It was an honor to be able to work with her and learn from her cross-cultural training expertise.

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Finally, I want to thank my husband, Ben, for his amazing support and love. I know I could not have successfully completed this project without him by my side (or at the other end of the phone line, when I abandoned him for three weeks to go to France).

TABLE OF CONTENTS

List of Tables	ix
List of Figures	x
Introduction -- The Plight of the Expatriate Spouse	
Significance of the Problem.....	1
Path of my Research	8
Chapter 1 -- Exploratory Research: Expatriate Spouses in France	
Related Studies	12
Aims of my Research.....	15
My Initial Hypotheses.....	16
Methods and Procedures.....	17
Data Analysis.....	18
Conclusions from my Research.....	29
Chapter 2 -- Culture Shock: The Underlying Problem for Expatriate Spouses	
Defining Culture Shock: Theories and Framework.....	32
Cultural Misunderstandings.....	43
Strategies for Dealing with Cultural Misunderstandings.....	47
Chapter 3 -- Proposed Solution: Assuming the Role of Anthropologist	
Developing a New Mindset	54
Pre-departure Preparation	58
Dress-Rehearsal	67
Conclusion – Expatriate Assistance: A Study Worth Pursuing	
Limitations of My Solution	72
Further Exploration.....	75
APPENDICES	
A. Research Forms.....	78
B. Table: Summary of Cultural Assumptions and Values.....	85
C. Recommended Readings.....	89
D. Internet Resources.....	92
REFERENCES	93

LIST OF TABLES

Table 1: Definitions of Culture Shock (http://languageadvantage.com/culture/culturedefinition.htm).....	32
Table 2: Culture Shock Symptoms (Kohls, L. Robert. <i>Survival Kit for Overseas Living</i> , p 96).....	42
Table 3: Recommended Readings for Gaining a Better Understanding of French Culture	64

LIST OF FIGURES

Figure 1: Cross-Cultural Training Availability (GMAC Global Relocation Trends 2003-2004 Survey Report, p 41).....	7
Figure 2: Spouse/Partner Assistance (GMAC Global Relocation Trends 2003-2004 Survey Report, p 46).....	7
Figure 3: The U-Curve of Cross-Cultural Adjustment (Mendenhall et al. <i>Global Management</i> , p 411).....	37
Figure 4: Storti's Withdrawal Diagram (a rendition of his diagram in <i>The Art of Crossing Cultures</i> , 2d ed. p 72)	45
Figure 5: Storti's Diagram for Successfully Crossing Cultures (a rendition of his diagrams in <i>The Art of Crossing Cultures</i> . 2d ed. p 72, 85).....	50

The real voyage of discovery consists
not in seeking new landscapes,
but in having new eyes.

—Marcel Proust—

INTRODUCTION

THE PLIGHT OF THE EXPATRIATE SPOUSE

SIGNIFICANCE OF THE PROBLEM

“I hate it here and want to go home!” This quintessential cry of frustration and discouragement has a particularly familiar ring to expatriate spouses: women or men who have agreed to accompany their spouses on an international assignment, thereby completely uprooting themselves from their familiar, stable life and relocating to a foreign country, typically for one to six years. Diplomats and military personnel have had a long history of foreign-based assignments. Over the past several decades, however, expatriate assignments have become a reality in even more families’ lives due to the rapid expansion of the global market. Multinational companies have recognized the necessity of temporarily relocating employees to international locations in order to coordinate efforts, transfer technology, launch new ventures, and facilitate communication within the company. To do this, multinational companies must make a number of decisions regarding their expatriate programs: Who do they send? How long should they stay? Will the employees’ families relocate with them? If they do, how will they facilitate everyone’s intercultural transition? Particularly, what assistance will they provide for the accompanying spouse? The latter being a question which companies often forget to consider.

One naïve assumption that has often persisted within sponsoring agencies is that “*anyone* can do the overseas job” (Ward 5). Many companies and organizations have had the false notion that “[their] ‘reps’ can get all the help they need after they get there—after all, plenty of people speak English” (Ward 6). Ted Ward, an international relocation specialist, warns that this reasoning leads to “an underestimation of the complexities of the intercultural task” (6). He makes a comparison between brash organizations who do not prepare their employees for overseas living, and military commanders who send untrained troops into battle. He asserts that it is *immoral* to send unprepared people on an international assignment (6). The wounds that will afflict them may not be physical, but they will be devastating nonetheless. In efforts to improve this intercultural situation, Ted Ward published his book, *Living Overseas: A Book of Preparations*, in 1984, as a training resource for American expatriates and their sponsoring organizations. Based on Ward’s suggestions—along with publications from other experts in this field such as Edward T. Hall, Fons Trompenaars, Mark Mendenhall, Milton Bennett, and Geert Hofstede—multinational companies have progressively improved upon the selection, training, and management of their expatriate personnel. International human resource managers are concerned about maximizing the success rates of expatriate assignments due to their strenuous and delicate nature, not to mention their high costs. In efforts to improve international relocation programs, many sponsoring organizations are now offering their expatriate employees assistance through both language and cross-cultural training. Yet where does attention to the accompanying spouse fit into these efforts? How does her¹ role affect the success or failure of an expatriate assignment?

¹ Although an increasing number of accompanying spouses are men, I will be referring to expatriate

When Ward wrote his 350-page book *Living Overseas*, he only dedicated a page and a half to the particular problems faced by the “non-working” spouse. He explains his neglect towards her situation by stating, “much of the research on intercultural adaptation has been conducted among overseas workers. Spouses and other family members are often less accessible to the researchers, so they tend to be overlooked or, at best, represented indirectly by the ‘working’ member of the family” (248). Yet even as Ward is excusing his minimal attention to the accompanying spouse, he admits that her problems are “at least as great—quite likely more difficult” than those faced by expatriate employees (248). Ward’s statement is confirmed in Rosalie Tung’s article “Expatriate Assignments: Enhancing Success and Minimizing Failure,” published a few years later, in 1987. In this article, Tung reports on a survey that was given to 80 U.S. multinational companies, who responded that the main reason for expatriate failure is the “inability of the manager’s spouse to adjust to a different physical or cultural environment” (206). Furthermore, Tung’s report qualifies the significance of expatriate failure² by reporting that more than half of its surveyed companies had failure rates of 10-20%, and 7% of the respondents had failure rates of 30% (205-206).

Even though international companies would rather stay focused on the professional performance of their employees, without having to “meddle” in personal and family affairs, research reports such as Tung’s have clearly pointed towards the adaptation of the expatriate spouse as being one of the strongest determining factors of success or failure in an international assignment. According to the *GMAC Global*

spouses as female for the remainder of this paper in order to simplify my syntax and facilitate readability.

² Failure was defined in the survey as “the inability of an expatriate to perform effectively in a foreign country and, hence, the need for the employee to be fired or recalled home” (206).

Relocation Trends Surveys, a wide-scale, yearly report issued since 1993, family-related factors have “topped the list” as responsible for expatriate assignment failure in nearly every survey (GMAC 56). The most current data still support this finding. The *Global Relocation Trends 2003/2004 Survey Report* stated that when asked “which factors were often or sometimes responsible for assignment failure,” respondents (which included relocation and human resource managers) cited spouse/partner dissatisfaction (90%) and family concerns (92%) most often, followed by the employee’s inability to adapt (88%) and poor job performance (83%) (GMAC 56). These data show that even if expatriate employees are exceptionally trained and qualified for their international assignment, they will not be able to effectively perform their duties if they have to deal with struggling and unhappy family members who want nothing more than to abandon their post and return home.

Instead of ignoring or brushing aside the concerns of accompanying family members, multinational companies need to recognize their responsibility in helping them prepare for and adapt to an international, relocation assignment. Research has shown that the practice of assuming that families can fend for themselves—that the family unit can deal with this adjustment in their own private way—has resulted in a high percentage of failed expatriate assignments. Expatriate children face particular challenges, which will vary depending on their age and tolerance for change. But for the purpose of this paper, I will be limiting my focus to the particular situation of the expatriate spouse’s adaptation, the most significant factor—according to research—in the success of an expatriate assignment.

The accompanying spouse's relocation adaptation almost always presents an even greater challenge than it does for the expatriate employee. While the employee faces the struggle of conducting business in a new culture with differing norms and expectations, the accompanying spouse faces the struggle of redefining nearly every aspect of her life. Often an international relocation means giving up her career or other meaningful activities, learning how to manage a household without any of her usual resources, finding effective ways to ease the transition of distressed children, and creating an entirely new social network. These adjustments would seem daunting in any context, yet for the expatriate spouse, they are intensified by the underlying stress of being in a bewildering, new culture with none of her normal support networks. With these challenging hurdles in mind, it is not hard to understand how an expatriate spouse could feel isolated, frustrated, and overwhelmed, and how her struggles would have a direct affect on her spouse's ability to focus on his own adaptation and responsibilities at work. An expatriate spouse currently fulfilling an assignment in France stated, "My spouse's adjustment has been as smooth or bumpy as my own. It has risen and fallen in direct proportion to my struggles [and] triumphs³." Consequently, even if certain international relocation managers may argue that their focus and expenditures should stay centered on their employees—whose cross-cultural blunders and poor adaptation would have direct consequences for the business—they cannot ignore the evidence that the adaptation of their employee's spouse is an important factor in the success or failure of any expatriate assignment.

³ Quote gathered during one of my interviews conducted on March 10, 2004.

Any type of failure is hurtful; however, expatriate failure is particularly crippling. On a business level, expatriate failure includes huge financial losses for the company and devastating career setbacks for the employee. On a personal level, it includes damaged relationships and bitter feelings towards another culture and possibly even towards one's own spouse. Although it is difficult to accurately determine the overall percentage of failed assignments, recent surveys estimate early-returns to be about 20 percent of all relocations (Hess 3). Early-returns, however, are only one type of expatriate "failure". Craig Storti explains in his book *The Art of Crossing Cultures* that a more common scenario for expatriates who *fail* to adapt is that they stay on, rather than go home early, but "with greatly diminished effectiveness, often doing themselves, their families, and their organizations irreparable harm" (2d ed, xvii). With these high "failure" rates, multinational companies have a vested interest in learning how to curb this problem.

Recognizing the vital role of the accompanying spouse in expatriate assignments is an important step in finding solutions to this problem. Since the publication of Ward's book *Living Overseas*, efforts have been made to conduct research on the particular struggles and needs of the expatriate spouse. Key researchers in this field include Nancy Piet-Pelon, Barbara Hornby, Robin Pascoe, Mary Haour-Knipe, Anne Copeland, Debra Bryson, Charise Hoge, and Yvonne McNulty, among others. Many relocation managers are now following researchers' counsel to provide pre-departure and in-country assistance, not only for their soon-to-be-transferred employees, but for their respective spouse and children as well. Figure 1 displays the breakdown of who is currently receiving cross-cultural training services from their sponsor-company, and Figure 2

shows the percentage of companies who offer other types of assistance to accompanying spouses⁴.

Cross-Cultural Training Availability

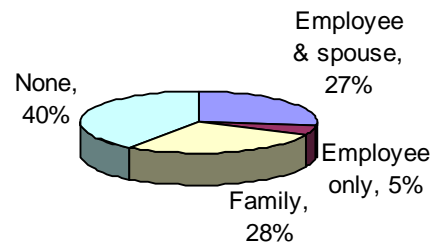


Figure 1: Cross-Cultural Training Availability (GMAC Global Relocation Trends 2003-2004 Survey Report, p 41)

Spouse/Partner Assistance

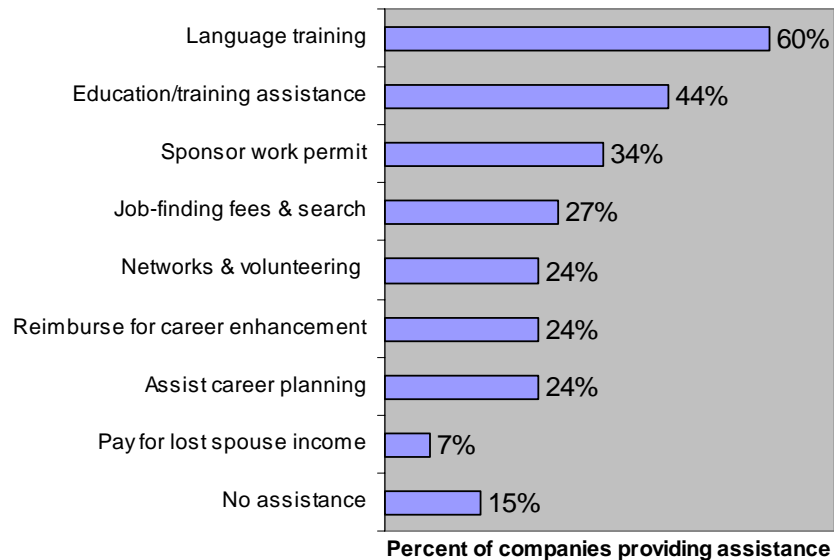


Figure 2: Spouse/Partner Assistance (GMAC Global Relocation Trends 2003-2004 Survey Report, p 46)

⁴ The GMAC Global Trends 2003/2004 Survey Report included 134 respondents who managed a worldwide expatriate population of 31,215 employees. For more information, refer to the following website: www.gmacglobalrelocation.com/2003survey

Apparently, multinational companies *have* been taking action with regards to the needs of expatriate spouses, and this increased sensitivity should lead to improvement in expatriate success rates. As noted earlier, however, current research such as *GMAC's Global Relocation Trends Surveys* shows that spouse/partner dissatisfaction is *still* currently among the top most critical issues in expatriate failure. The problem that now presents itself is how to *better* provide assistance for accompanying, expatriate spouses in order to facilitate their adaptation *even more*. The details of this problem lie in the answers to questions such as, “What needs are currently not being met?” “What assistance and resources are lacking?” “What can we learn from expatriate success stories? How can future expatriate spouses be better prepared?” The goal of my thesis is to explore the plight of the expatriate spouse, with a focus on Americans transferred to France, in order to provide some possible answers to the questions listed above.

PATH OF MY RESEARCH

I started down the path of my research with first-hand experience of expatriate life. Fifteen years ago my family had been relocated to Châtelleraut, France for a three-year expatriate assignment. My personal struggles to learn a second language, adjust to the French public school system, and make new friends had been difficult; but, as I came to find out later, my mother's adaptation plight was even more challenging. My father agrees without hesitation that my mother's ability to eventually adapt to life in France was the most critical factor in the success of our expatriate experience. Acknowledging my mother's vital role in my family's overall adaptation prompted the development of my thesis topic. By studying the available literature on expatriate spouse adaptation, coupled with conducting my own exploratory research with American expatriate spouses

presently living in France, I have come to a more thorough understanding of the current issues relating to expatriate spouse adaptation and have formulated some possible answers to the questions surrounding this problem.

At the beginning of my research, I was amazed at how easily one can find numerous books and websites full of advice dealing with the daily-life adjustments of living in a foreign country. Country-specific guides relating to shopping, banking, schooling, driving, etc. are readily available if a person knows where to search. For some international relocation managers, these resources appear to present an obvious solution. They simply provide this literature to their expatriate spouses as a reference for any information that they might need, with the false notion that they have done enough. Yet after further study, as well as personally interviewing several expatriate spouses living in France, I discovered that their biggest challenge does not simply involve finding good replacement products, resources, and institutions—it does not even revolve around identity issues relating to career discontinuation or activity replacement—rather, the most difficult aspect of an expatriate assignment entails dealing with the irrational and highly emotional experience known as *culture shock*.

The main difficulty with culture shock is defined by the term itself: it *shocks*—a person is thrown off guard and baffled by its numerous, negative effects because he or she did not expect to experience it and does not know how to respond to it appropriately. Even if an expatriate spouse were aware of its existence prior to her international relocation, by having read about it or heard of other people's experiences, she would still get a good dose of "shock" due to culture shock's elusive definition and varying affects on people. With this point in mind, adequate *pre-departure* preparation is indispensable

to an expatriate spouse's successful cross-cultural adaptation. The only way to buffer a shock is to be somewhat prepared for it. Having an idea of what to expect provides a calming reassurance that would positively affect the anticipation of a relocation assignment as well as the initial in-country experience of expatriate life. Pre-departure training can educate prospective expatriate spouses about the notion of culture shock, including both its emotional and physical effects. Cross-cultural trainers should provide concrete methods that can help mitigate culture shock's related stresses and frustrations, as well as helping expatriate spouses to develop appropriate coping skills that can assist them in dealing with the unsettling experience of living in another culture. In chapter 2, I will discuss these issues in greater detail by surveying different definitions of culture and providing various theories about culture shock, along with strategies for dealing with its unsettling experience.

In order to have a successful, cross-cultural adaptation, a person must be able to put aside their emotional responses and take a step back to observe a situation with an open mind and a willingness to acknowledge an alternative interpretation, based on cultural differences. Engaging in an objective analysis of human behavior is surprisingly difficult to carry out. Literature dealing with crossing cultures emphasizes that the difficulty of cultural analysis exists because it deals with subconscious reactions and judgments. People view their culturally influenced assumptions and values as verities and do not normally think to question their cultural premises (Carroll 3).

As a means to remove oneself from this engrained mentality and to establish enough distance from social interactions in a foreign culture, I propose teaching future expatriate spouses to adopt a new mindset by assuming the role of anthropologist—just

as an actor would assume a role in a play. The benefits of this approach are twofold: firstly, imagining oneself as an anthropologist provides excellent motivation to get out and explore a new culture rather than avoiding it and hiding out in the safe haven of one's own home; secondly, having a new, temporary identity will help create the emotional distance necessary to minimize reactionary, negative feelings and enable productive, cultural analysis to take place. I will explain the details of this proposed solution in chapter 3 and will demonstrate how to incorporate its practical application into cross-cultural training for expatriate spouses.

Even though the focus of my study is based on a specific study of American expatriate spouses who were relocated to France—the information in my report being most relevant to their situation—I believe that anyone who is interested in increasing a person's chance of successful cross-cultural adaptation could benefit from my findings. Interested parties may include entire families who are preparing for a relocation assignment, regardless of its location; those who are currently experiencing expatriate life or an extended stay in a foreign country; managers of organizations involved in sending employees on international assignments; as well as intercultural trainers and consultants.

CHAPTER 1

EXPLORATORY RESEARCH: EXPATRIATE SPOUSES IN FRANCE

RELATED STUDIES

Over the past few years, as the role of accompanying spouses has been increasingly recognized as a vital issue in expatriate assignments, several studies have been conducted on the adaptation and overall well-being of expatriate spouses. As I explored this literature, the following studies proved to be the most relevant to my research and guided me in creating my own exploratory study:

➤ **Global Relocation Trends 2003/2004 Survey Report**

This extensive, annual report, which I have already quoted in my introduction, provides valuable statistics relating to current global relocation trends within international organizations. For the past ten years, GMAC Global Relocations Services, along with the National Foreign Trade Council, and SHRM Global Forum, have sponsored this survey. Their main goal has been to follow important trends within the expatriate community and to explore old and new challenges faced by expatriates and international relocation administrators. This year's survey included 134 respondents, comprised of human resource professionals and/or relocation managers, who "managed a worldwide expatriate population of 31,215 out of a total employee population of 4.5 million" (GMAC 1). Although this survey has always focused on how companies have addressed family issues, this year's survey included a few new questions dealing with early returns by expatriates and their families. Spouse/partner

dissatisfaction and family concerns were listed most often as the principle factor in assignment failure. Other related questions explored what companies are currently doing to assist accompanying spouses in having a more successful adjustment abroad, such as offering cross-cultural training and career support. The results of this year's survey can be viewed at www.gmacglobalrelocation.com/2003survey.

➤ **“Many Women Many Voices: A Study of Accompanying Spouses Around the World”**

The Interchange Institute, with Anne P. Copeland as executive director, conducted this study and published their results in spring of 2002 in an 82-page report. This research explores the cross-cultural adjustment and experiences of 194 accompanying spouses and partners of expatriates in 15 different countries. Its goal was to explore the various factors that affect spouses' international experiences at a deep level, rather than focusing on superficial ratings regarding how they feel about daily living tasks. The final report of this project presents key findings coupled with specific recommendations for sponsoring organizations and for accompanying spouses. Among its conclusions, the report asserts that its data clearly show that pre-departure support and language training lead to a better cultural adjustment. A chapter entitled “Advice from Accompanying Spouses for Accompanying Spouses” offers advice to accompanying spouses in the form of direct quotes summarized by the following main recommendations: #1 – Get involved in the local

community, #2 – Learn about the host country and culture, #3 – Be upbeat and flexible, #4 – Learn the host language, and #5 – Don't expect too much of yourself (68-69). More information about the key findings and recommendations of this study can be found at www.interchangeinstitute.org/html/research.htm.

➤ **“The Trailing Spouse: Barrier to Mobility or International Asset”**

Yvonne McNulty, currently a doctoral candidate at Monash University, began this study on expatriate spouses in February 2001 when she was pursuing her Bachelor's degree in business at Southern Cross University (Australia). McNulty uses the definition of *trailing spouse* given by www.wordspy.com on June 28, 1996: “In a relationship, the person who gives up their job in order to follow the other person to a new location where that person has found employment.” This ongoing study is investigating the needs and challenges of the expatriate trailing spouse by exploring four aspects of trailing spouse relocation: (i) *willingness to relocate*, (ii) *spousal adjustment*, (iii) *satisfaction*, and (iv) *relationship stress*. Participants in this research respond to a questionnaire posted at www.thetrailingspouse.com. As of August 2004, her sample consisted of 231 male and female English-speaking trailing spouses located in 48 host countries. McNulty's preliminary findings (based on a sample of 162) have recognized the need for more qualified and experienced International Human Resource Management (IHRM), better communication between the sponsoring organization and the trailing spouse, and more support for

the intrinsic needs of the trailing spouse rather than solely focusing on external issues (housing, health-care, etc.). For more information regarding this study, refer to McNulty's website www.thetrailingspouse.com, which she continuously updates as her research progresses.

These three studies, which I have summarized above, provide valuable information concerning the plight of the expatriate spouse and how her needs can be better met. Each of these studies has been conducted on a large scale: they have gathered a large sample of respondents living in several host countries spread all over the world. Consequently, their reports on adaptation struggles are generalized rather than country-specific and deal with underlying issues that are common to most expatriate spouses across the world. Although this information is an excellent basis for coming to a better understanding of the main troubles faced by expatriate spouses, my particular interest in the French-American experience required a more specific study. In order to obtain the information that I needed, I decided to conduct my own small-scale, exploratory research in France.

AIMS OF MY RESEARCH

The main objective of my research was to learn more about the specific expatriate situation in France. Thanks to support from Brigham Young University's Global Management Center and its director, Dr. Brooke Derr, I was able to travel to France to conduct my own exploratory study. This research opportunity presented several advantages: not only would I be able to gather the specific, country-appropriate information that I needed for my research, but equally important, I would be able to get a better feel for the plight of expatriate spouses by interacting with them and witnessing

their situation first hand. I wanted to learn about some of the specific challenges that American expatriate spouses are currently facing in France. I determined that it would be most useful to only interview accompanying spouses who are presently fulfilling an expatriate assignment—rather than those who had recently returned to the United States—because by being in the midst of their cross-cultural adaptation, they could more readily pinpoint their most serious struggles and helpful resources. Also, once a person returns home after an overseas experience, their memories of that experience tend to be either glorified or negatively exaggerated. Moreover, I realized that this study fell at a timely moment to conduct a cross-cultural study between Americans and the French due to the currently high level of Franco-American tension produced by the ongoing political debates involving Iraq. By conducting an in-country, exploratory study, I anticipated being able to observe the affects of this tension, as well as other current factors, that are presently shaping the expatriate experience for accompanying spouses in France.

MY INITIAL HYPOTHESES

My initial hypothesis was that among the expatriate spouses I would interview, those who received the most pre-departure language and culture training were having a better overall expatriate experience. I also predicted that most of the accompany spouses would say that they did not receive adequate preparation for their overseas relocation and wished that their spouse's company would have provided more assistance. I expected to hear about an increased sense of Americans not feeling welcomed by the French, coupled with an augmentation of cultural clashes stemming from current political tension and debates. I anticipated that the expatriate spouses in my sample would be quite willing to discuss their individual situations and would gladly provide suggestions in hopes of

helping future expatriates. I expected to gather feedback about what pre-departure training was, or would have been, helpful and what resources they personally had found to be most useful in assisting them with their ongoing cross-cultural adaptation.

METHODS AND PROCEDURES

I recruited my subjects through third parties and referrals from other expatriates. My main networking was done as I carried out a two-and-a-half week internship from February 27 to March 16, 2004 with Polly Platt, author of *French or Foe?* and owner of Culture Crossings®, her personal business in Paris through which she conducts cross-cultural seminars for transferred managers and their spouses. While working for Ms. Platt, I was able to meet expatriate spouses at one of her seminars given at WICE (a non-profit, cultural and educational association for Anglophones in Paris) as well as a luncheon at Saint Ann's Cathedral, which was hosted by a group of English-speaking women. In addition to recruiting research subjects from the people I met under the tutelage of Polly Platt, I also gathered willing participants by word of mouth through contacts I had established in two other cities in France, which will remain unnamed for confidentiality reasons. In all of these locations there were also a few expatriate spouses who helped me tremendously by referring me to their expatriate friends and leading me to additional contacts.

Once I found a person willing to participate in my research, I gave him or her a copy of a consent form to sign—as well as a copy to keep—followed by a questionnaire. If I were able to personally interview a research subject, I addressed the open-ended questions as a discussion by reading the questions aloud and taking notes on his or her answers. Due to time constraints, other research subjects simply filled out the

questionnaires and open-ended questions themselves and then mailed or emailed me their responses. Appendix A contains a copy of the consent form and questionnaire used for my research.

DATA ANALYSIS

Since my sample is small (20 participants) and my subjects do not represent a random sample, I will not be applying any statistical sampling analysis to my data, nor will I be generalizing the information that I gathered. I will be using descriptive statistics of my data, however, to make observations within my sample. I will report on the number of subjects in my sample who answered in certain ways and will use their personal experiences as explanatory examples to help illustrate and clarify some of the needs and concerns held by American expatriate spouses in France.

Background information on research subjects

My exploratory research sample includes twenty accompanying spouses, all of whom are American citizens currently fulfilling an expatriate assignment in France. My subjects are residing in three metropolitan areas in three different regions in France. For confidentiality reasons, no information about their spouse's employer was asked nor recorded. Based on the responses from my questionnaires, I organized the gathered information about my research subjects into five categories: 1) *Demographics*, 2) *Current Expatriate Assignment*, 3) *Other Relocation Experiences*, 4) *Preparation and Assistance*, 5) *Personal and Family Adjustment*. I will begin with a short summary of each category, highlighting the interesting and most important findings, and will then proceed to display the details of my research in each category by quoting the questions from my survey and displaying the corresponding results in figures and tables.

1) DEMOGRAPHICS: SUMMARY

Only 1 out of my 20 subjects is male, which is not surprising considering that married, female expatriates represent only about 5% of the expatriate population (GMAC 16), thereby corresponding to the small percentage of accompanying, male spouses. The median age of my subjects is 39.5 years old, and the median number of children is two. More than half of the accompanying spouses I interviewed (11 out of 20) have had, or currently have, a career.

2) CURRENT EXPATRIATE ASSIGNMENT: SUMMARY

More than half of my research subjects (11 out of 20) volunteered for their relocation assignment to France. Only two accompanying spouses responded that they were personally not happy about the relocation. Five respondents had all or some of their children not happy about the move. The median expected assignment duration in France is 4-5 years. The median amount of time that my subjects had been living in France at the time they took my survey is 1-2 years. One fourth of the respondents were employed before relocating to France and now are no longer employed. The majority of my subjects (16 out of 20) indicated that their children are attending private or international schools.

3) OTHER RELOCATION EXPERIENCES: SUMMARY

One fifth of my research subjects (4 out of 20) had never relocated with their spouse within the United States. For the majority of my subjects (14 out of 20), their current assignment in France is their first expatriate experience. Three of the respondents had experienced one other expatriate assignment, and the other three respondents had experienced anywhere from 2 to 6 previous expatriate assignments.

4) PREPARATION AND ASSISTANCE: SUMMARY

The median amount of time that my subjects had to prepare for their relocation to France was 3-4 months. All of my respondents received some amount of pre-departure and in-host-country support from their spouse's sponsoring organization, but one fourth of my research subjects only received very basic assistance such as housing and banking aid. Of those who did receive further assistance, 12 out of 20 respondents indicated that their spouse and they were both provided with language and cultural training. Only two respondents said that their children received language and culture training. None of my respondents were given career counseling and assistance for finding employment in France. Seven respondents rated their pre-departure assistance as "excellent" or "very good;" however, this number went down to only 3 out of 20 who rated their post-arrival assistance as "excellent" or "very good." The best resource in helping my respondents prepare for and adjust to their stay in France was "French language classes (and/or videos, CDs, and books)" with 13 subjects marking this response, compared with only 2 respondents marking "French movies/TV watching" as being helpful.

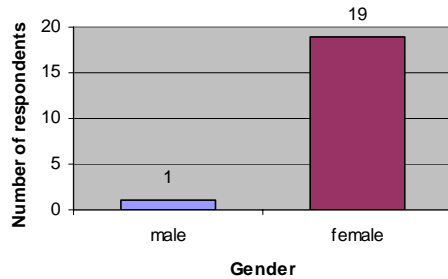
5) PERSONAL AND FAMILY ADJUSTMENT: SUMMARY

The majority of my subjects (16 out of 20) marked that they "like some aspects of expatriate life and dislike others." One fourth of my respondents stated that they "have struggled much more than they anticipated." Only one respondent said that she "*somewhat* (qualification added by the respondent) dislikes the expatriate life and regrets coming." Fourteen expatriate spouses indicated that "socializing with other expatriates" helped them to adjust to their stay in France, versus only ten who indicated that "socializing with French community members" helped them towards this goal. The majority of my subjects (12 out of 20) felt that their spouse had had an easy adjustment to

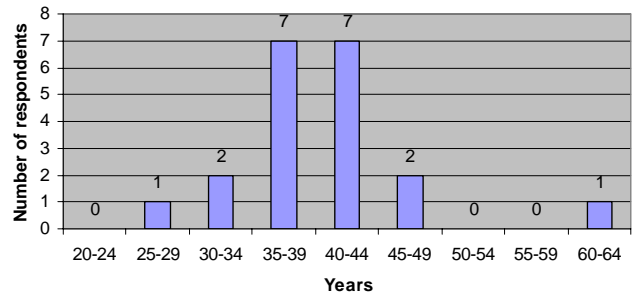
this expatriate experience, while the adjustment of their children has been more difficult. Thirteen respondents indicated that all or some of their children have struggled or are still struggling.

1) DEMOGRAPHICS: DETAILS

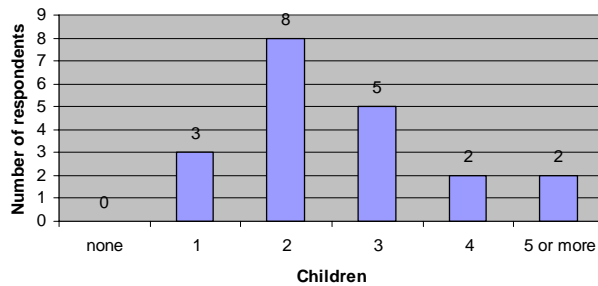
Gender of Research Subjects



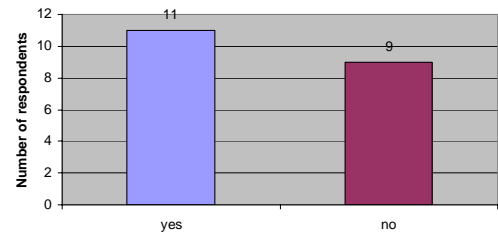
Age of Research Subjects



Number of Children



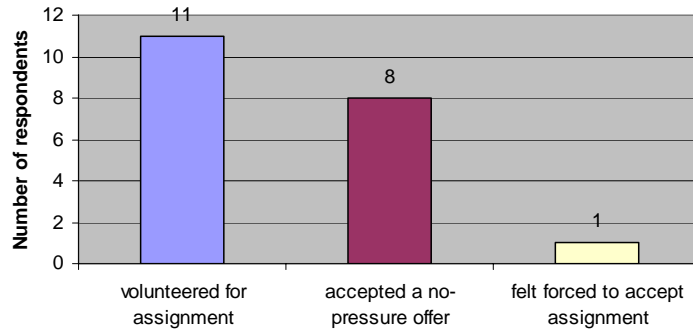
Have Had or Currently Have a Career



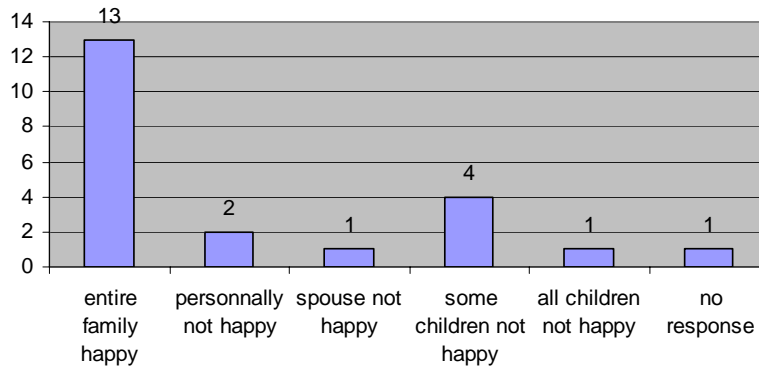
2) CURRENT EXPATRIATE ASSIGNMENT: DETAILS

➤ *“What were the circumstances behind your current expatriate assignment to France?”*

Relocation Circumstances

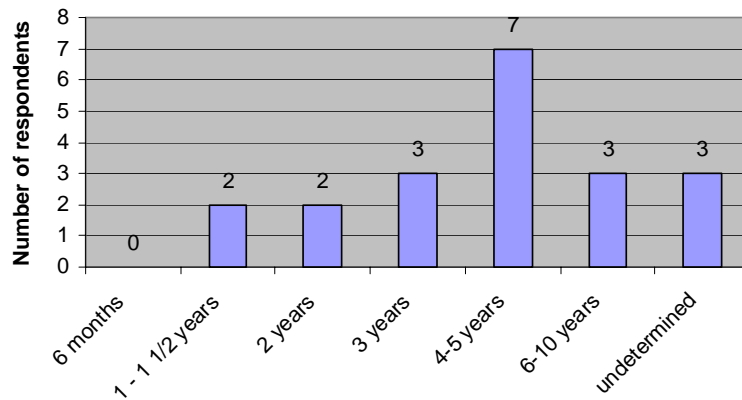


Feelings Towards Relocation



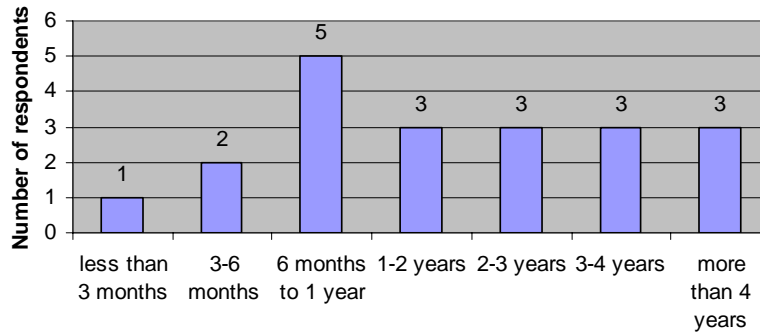
➤ *“What is your expected expatriate assignment duration?”*

Expected Assignment Duration



➤ *“How long have you been living in France?”*

Current Length of Time Living in France

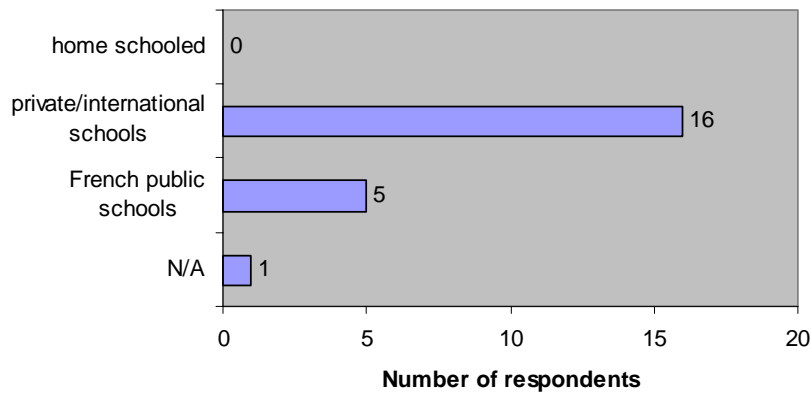


➤ *“Describe your current employment situation while living in France (check all that apply).”*

	Total # of checks
I was not employed before moving to France and I am not employed now:	15
I was employed before moving to France and I am not employed now:	5
I was employed before moving to France and I am employed now:	0
I was not employed before moving to France and I am employed now:	0
I am doing volunteer/ non-paid work:	2
I am currently pursuing additional education:	2

➤ *“If some/all of your children are living with you right now, what is their schooling situation?”*

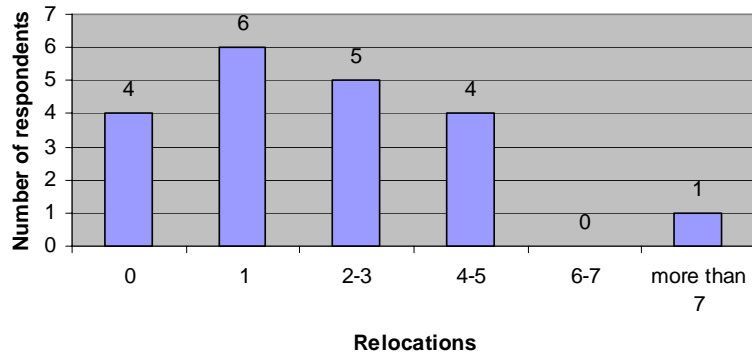
Children's Schooling Situation



3) OTHER RELOCATION EXPERIENCES: DETAILS

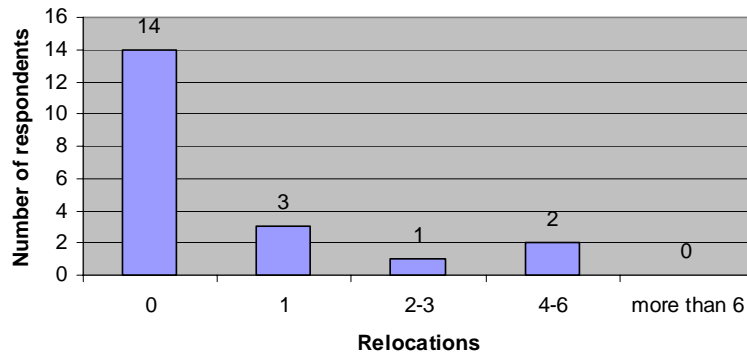
➤ *“How many times have you and your spouse relocated within the United States?”*

Number of Relocations within the US



➤ *“Besides your current assignment in France, how many other international relocations have you undertaken with your spouse/partner?”*

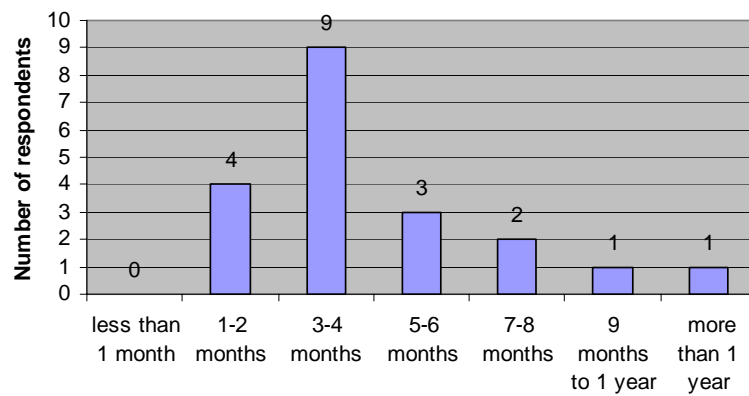
Number of Other International Relocations



4) PREPARATION AND ASSISTANCE: DETAILS

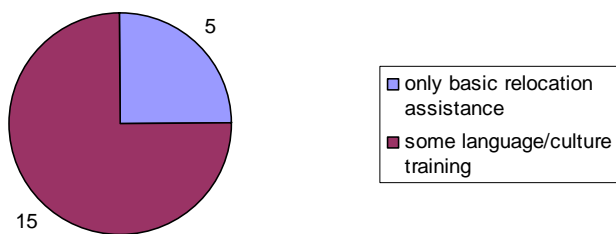
➤ *“What amount of time did you have to prepare for your relocation to France (from the official decision moment to your arrival in France)?*

Preparation Time



➤ *What pre-departure assistance did your spouse’s company provide?*

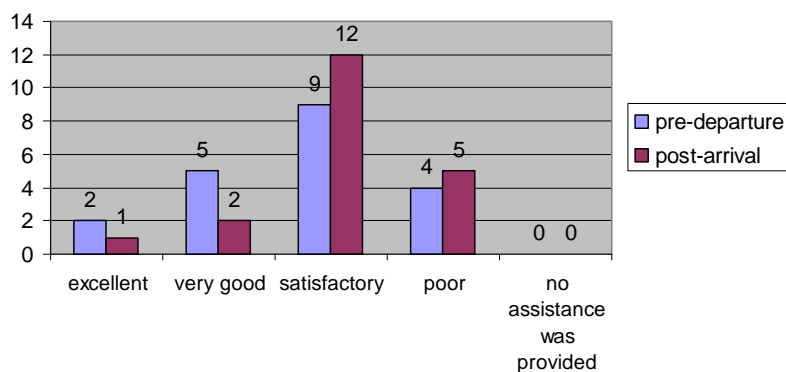
Assistance Provided by Spouse's Company



Language, Culture, and Other Assistance	Total # of checks
language and culture training for my spouse	12
language and culture training for myself	12
manuals, books, and/or videos	9
professional consultant	3
only culture training for myself	2
language/culture training for my children	2
only language training for my spouse	1
only language training for myself	1
only culture training for my spouse	1
career counseling and assistance for myself	0

➤ *“How would you rate the level of pre-departure assistance provided by your spouse’s company?” and “How would you rate the level of assistance provided by your spouse’s company once you arrived in France?”*

Level of Assistance Provided by Spouse's Company



➤ *“Which of the following sources have helped you to prepare and adjust to your stay in France? (check all that apply)”*

➤ “How would you describe the overall adjustment of your spouse?”

	Total # of checks
my spouse has had an <i>easy adjustment</i> and really likes this expatriate experience	12
my spouse has <i>struggled</i> but is now enjoying this expatriate experience	5
my spouse is <i>still having a difficult time</i> adjusting to life in France	3
my spouse is <i>not adapting very well</i> and wants to leave France	0

➤ “How would you describe the overall adjustment of your child/children?
(check all that apply)”

	Total # of checks
all of my children have had an <i>easy adjustment</i> and really like this expatriate experience	6
all of my children have <i>struggled</i> but are now enjoying this expatriate experience	4
all of my children are <i>still having a difficult time</i> adjusting to life in France	0
all of my children are <i>not adapting very well</i> and want to leave France	0
some of my children have <i>struggled</i> but are now enjoying this expatriate experience	8
some of my children have had an <i>easy adjustment</i> and really like this expatriate experience	6
some of my children are <i>still having a difficult time</i> adjusting to life in France	6
some of my children are <i>not adapting very well</i> and want to leave France	1
N/A	1

Responses from open-ended questions

Appeals and Gains:

When asked what was most appealing about the possibility of being relocated to France, several of my research subjects replied that they saw it as an *adventure*. Every person who answered this question either mentioned the appeal of traveling and discovering a new culture or the opportunity of learning another language. Most of my respondents thought that their international relocation would benefit their children by exposing them to different viewpoints and a broader perspective on life. Listed below are some of the specific appeals and gains that my research participants gave:

- *tremendous opportunity*
- *venturing into the “unknown”*
- *so much to do: tourism, attractions, artistic experiences!*
- *more vacation time with family*
- *developing an open-minded perspective*
- *good for children (learning a language)*
- *children will better understand and adopt in the world due to their international experience*
- *broader education for whole family*

- *learning that history really means something*
- *expatriate life is a special kind of bubble where you can be more yourself (between two cultures)*
- *learning that I can survive without things we deem necessities at home*
- *personal growth that comes from suffering*
- *professional growth for spouse*

Concerns and Losses:

Concerns about the relocation offer mainly revolved around the uncertainty of life in France. Some respondents replied that they were very concerned with how their children would handle the transition and if they would be missing out on important experiences in the United States (especially if they were in their teenage years). The most frequently cited loss was not being able to spend time with extended family. The following list displays some of the particular concerns and losses that my respondents mentioned:

- *leaving older parents behind*
- *loss of independence due to language handicap*
- *so much energy required to make it through the day (means less energy left over)*
- *feel isolated and less apt*
- *inability to be “productive” as a result of language barrier*
- *long hours at work for husband*
- *kids not having time to play after school because the school days are so long!*
- *missing family in the States (weddings, baptisms, special events...)*
- *no sports for husband and children (husband has found no replacement activities)*
- *no school extracurricular activities*
- *loss of second income/career*

Recommendations to future expatriates:

The most common suggestion that my research subjects made to future expatriate spouses is to try and have as much language instruction as possible before leaving the United States. Other recommendations included becoming more informed about the schooling system and choosing one’s housing location wisely, so as to minimize travel time to and from school and other frequented locations. Several expatriate spouses

mentioned the benefit of contacting someone in France before relocating in order to ask questions and get a better idea of what to expect. Listed below are some of the specific recommendations that my research participants gave to future expatriates:

- *get cultural info before making your decision*
- *get a good relocation agent*
- *I wouldn't have brought as many of our belongings (furniture, etc.) and left it in storage.*
- *need to have contract earlier to take advantage of pre-departure programs*
- *need to have a safety net waiting for you (a bilingual mentor to go everywhere with you)*
- *repatriation training should begin when you are expatriated*
- *know how to handle illness (where to go, what to do)*
- *hook up with MESSAGE [a playgroup for English speakers in Paris]*
- *work on "international relations" with the French people rather than allowing yourself to be sucked into the expat community*
- *try to get involved in French groups (sports, etc.)*
- *need to know what is cultural and what is simply a problem (e.g. husband working late)*
- *get a budget to travel home (vs. one trip in the summer)*
- *push for the company to provide better relocation services*
- *I have always claimed that if I were fluent in French, this expat assignment would have been a "piece of cake." If I could go back (and were given more time before departure) I would spend a lot more time studying the language.*
- *if parents have a positive attitude, it makes a huge difference on all of the family*

CONCLUSIONS FROM MY RESEARCH

My exploratory research was even more beneficial than I had anticipated. The expatriate spouses whom I encountered in France were very enthusiastic about participating in my research and sharing their insights and suggestions. Several women went out of their way to provide me with lists of other expatriate contacts, and one expatriate spouse even organized a get-together at her home where she invited several people to come participate in my research together. I am very grateful for their assistance and participation and hope that their feedback will lead to improvements in future expatriate programs.

Several of the expatriate spouses whom I interviewed received better assistance from their sponsoring organizations than I had hypothesized. I expected to receive overall lower ratings for the level of pre-departure and post-arrival assistance provided by their spouse's company. The majority of my research subjects still saw the need for improvement in this area—only seven respondents rated their pre-departure assistance as “excellent” or “very good” and three respondents qualified their post-arrival assistance as such—yet the number of those who were more than satisfied with their sponsoring company's assistance did surpass my expectation. I was also surprised to find that the political tensions between the United States and France were not having a particularly negative impact on my research participants. While several of them mentioned concern for international relations, they also expressed their admiration that, in general, the French are able to maintain a personal and political distinction when interacting with people from other countries. Some expatriate spouses who had been in France during the terrorist attacks of 9/11 also shared their experience of having French community members reaching out to them with sympathy and heartfelt condolences.

In addition to the interesting findings mentioned above, my exploratory research led me to another discovery which I had not addressed in my initial hypotheses. The discovery I made, which actually has the most significant impact on pre-departure training, is that each accompanying spouse has very different goals relating to her expatriate experience. Some of my research subjects were endeavoring to find English-speaking services and expatriate clubs that would give them the greatly needed support and social networks to ease their adjustment to life in France. Others were making extreme efforts to avoid mingling with other Americans as they tried to integrate

themselves into the French community and maximize their intercultural experience. Consequently, since every expatriate spouse is not necessarily concerned about the same things—i.e., learning to speak French well and making French friends—pre-departure training programs need to be customized to address each prospective expatriate’s specific needs, concerns, and goals.

Regardless of variations in individual’s goals, however, I believe that every expatriate spouse could still benefit from improved cross-cultural training that would better prepare her for experiencing culture shock, thereby easing her adjustment to life in France. The degree and intensity of cross-cultural training depends upon the expatriate spouse’s level of interest in cultural understanding and adaptation. The following chapters of my thesis focus on expatriate spouses who are interested in maximizing their preparation for their international relocation and who have the desire to adapt as much as possible to its culture during their stay abroad. The intensity of my proposed pre-departure training can easily be scaled down, however, to fit the needs and goals of individual expatriate spouses.

CHAPTER 2

CULTURE SHOCK: THE UNDERLYING PROBLEM

FOR EXPATRIATE SPOUSES

DEFINING CULTURE SHOCK: THEORIES AND FRAMEWORK

The main challenge and underlying problem of international relocation involves the unsettling experience referred to as “culture shock.” Even though this term is commonly used today, its notion remains very obscure even for people who have experienced it because they often fail to recognize its numerous effects. As I mentioned in my introduction, the term itself reveals its problematic nature: “culture shock” involves an unexpected and disturbing experience qualified as a *shock*. The type of shock that it entails, however, is where its ambiguous definition lies. For what exactly is *culture*? Ted Ward poignantly states that “the essential core meaning of ‘culture’ is elusive. We use the word because we need it, not because we agree on exactly what it means” (52). Every publication dealing with intercultural issues must begin by attempting to define what they mean when referring to a people’s “culture.” Table 1 displays ten of the most popular definitions of culture given since the latter part of the 19th century.

Table 1: Definitions of Culture Shock (<http://languageadvantage.com/culture/culturedefinition.htm>)

01	That complex whole which includes knowledge, beliefs, art, morals, laws, customs and any other capabilities and habits acquired by man as a member of society. <i>1871 - Tylor</i>
02	The man-made part of the human environment. <i>1948 - Herskovits</i>
03	Transmitted patterns of values, ideas and other symbolic systems that shape behaviour. <i>1952 - Kroeber and Kluckhohn</i>
04	Set of common understandings expressed in language. <i>1970 - Becker and Geer</i>
05	Values, beliefs and expectations that members come to share. <i>1979 - van Maanen and Schein</i>
06	Pattern of beliefs and expectations shared by members that produce norms shaping behaviour. <i>1980 - Schwartz and Jordon</i>
07	The collective programming of the mind which distinguishes the members of one human group

	from another. <i>1980 - Hofstede</i>
08	Three aspects: (1) some content (meaning and interpretation) (2) peculiar to (3) a group. <i>1983 – Louis</i>
09	Primarily a system for creating, sending, storing and processing information. <i>1987 - Hall and Hall</i>
10	A distinctly human capacity for adapting to circumstances and transmitting this coping skill and knowledge to subsequent generations. <i>1987 – Harris and Moran</i>

A frequent explanation of culture in anthropological studies differentiates between “big C culture” (the tangible aspects of culture including art, literature, traditional dress, music, and cuisine) and “little c culture” (the hidden aspects of culture common to a particular people, such as their beliefs, values, assumptions, and judgments). One way to better understand the significance of “little c culture” is by means of a commonly used metaphor in the field of intercultural studies: the *iceberg metaphor*, which points out that “only 10 percent of the iceberg is visible above the waterline, while 90 percent remains hidden” (Asselin xv-xvi). Applied to culture, what we cannot readily observe is actually the most important part to consider when trying to form a correct impression of the whole. However, even awareness of one’s *own* culture typically remains out of human consciousness. Such an oblivious basis for cultural understanding makes it very difficult to comprehend a culture different from one’s own. Helping people to become aware of the hidden aspects of culture has been one of the main challenges in the field of cultural anthropology.

In efforts to better understand the meaning and consequences of the various “little c cultures” in our world, cultural anthropologists have attempted to compare the value systems among different societies in order to arrive at definitions by contrast. One prime example is found in the work of cultural anthropologist Geert Hofstede who conducted an extensive study on the large, multinational corporation, IBM. He surveyed a sampling of

IBM's employees in 50 different countries by asking them pre-coded questions about their value system, and then converted their answers to a number score. Based on the collected data, Hofstede created his "Four-Dimensional Model of Differences among National Cultures." With this model, countries are characterized by a comparative index score in each of the following categories, or dimensions: 1. *Power Distance*—"social inequality, including the relationship with authority" (13); 2. *Collectivism vs. Individualism*—"the relationship between the individual and the group" (13); 3. *Femininity vs. Masculinity*—"the social implications of having been born as a boy or a girl" (14); (4.) *Uncertainty Avoidance*—"ways of dealing with uncertainty, relating to the control of aggression and the expression of emotions" (14); and finally, a fifth dimension which Hofstede added to his model later, 5. *Long-Term vs. Short Term Orientation*—values oriented towards the future or towards the present and past (166).

Hofstede describes his statistical model in detail in his book *Cultures and Organizations: Software of the Mind*. In this work, he metaphorically defines culture as "the collective programming of the mind which distinguishes the members of one human group from another" (5). Even though Hofstede has managed to apply a scientific, quantitative approach to describing different cultures, he does not wish to infer that people are in fact programmed just like a computer with a rigidly-set mental program and pre-determined behavior. Hofstede recognizes that people frequently deviate and react against their cultural norms, yet at the same time, he wishes to illustrate that people do normally adhere to a culturally influenced pattern of behavior which he refers to as "software of the mind" (4). Hofstede also explains in his book that learning a new culture is not as simple as *reprogramming* a person's brain—even though many expatriates have

probably wished that their mind could simply be “reformatted” in order to grasp what is going on in their host’s culture.

The reason a person cannot easily undo and redo his cultural programming is due to the intricate and pervasive manner in which he learned his culture. Raymonde Carroll stresses this point in her detailed explanation of cultural learning:

Indeed, my culture is the logic by which I give order to the world. And I have been learning this logic little by little, since the moment I was born, from the gestures, the words, and the care of those who surrounded me; from their gaze, from the tone of their voices; from the noises, the colors, the smells, the body contact; from the way I was raised, rewarded, punished, held, touched, washed, fed; from the noises, the colors, the smells, the body contact; from the stories I was told, from the books I read, from the songs I sang; in the street, at school, at play; from the relationships I witnessed between others, from the judgments I heard, from the aesthetics embodied everywhere, in all things right down to my sleep and the dreams I learned to dream and recount. I learned to breathe this logic and to forget that I had learned it. (3)

Once all of these aspects of cultural identity are brought to a one’s attention, it becomes clearer that cultural influences penetrate nearly every aspect of a person’s life. It is easier to understand how cultural differences could have a significant impact on the way people live. Yet just as Carroll insists, most people do not recognize that they have progressively learned their culturally based logic, starting from the day they were born. Rather, they simply assume that this is just the way life is, and every other rational,

normal human being undoubtedly embraces the same, *correct* logic as they do. This naïve attitude is what instigates the experience of culture shock. When one culture encounters another, the people involved in the exchange are usually not prepared for the underlying differences in their reasoning and behaviors. “[C]onflict, dissonance, and disorientation are the almost inevitable result” (Kohls 26).

Kalvero Oberg is the anthropologist who is credited with coining the term “culture shock.” In his article, “Cultural shock: Adjustment to new cultural environments,” published in 1960, Oberg defines culture shock as “the anxiety that results from losing all our familiar signs and symbols of social intercourse” (177). Although this definition can be appreciated intellectually, it remains too abstract for the majority of people to grasp its functional meaning. To better explain the effect of this experience, Oberg also outlines in this article four stages of emotional reactions that are common among cross-cultural sojourners: *the honeymoon*, *the crisis*, *the recovery*, and *the adjustment*. He derives his categories, in part, from a study conducted by Lysgaard in 1955. In this study, Lysgaard examines the cultural adjustment of international students residing in the United States. He discovers a pattern of cultural adjustment that shows an initial 6-month period when the students experienced a fairly good adjustment, followed by a year of significantly worse adjustment, until finally they regained and surpassed their original feeling of good adjustment. Lysgaard named this pattern “the U-curve hypothesis.”

The popularity of the U-curve hypothesis has led to the common practice of using descriptions of various stages, or phases, of cross-cultural adjustment as a format for defining the experience of culture shock. Figure 3 displays Black and Mendenhall’s

rendition of the U-curve hypothesis which labels the bottom of the curve as the actual “culture shock” phase of cross-cultural adjustment. Although the names used in Black and Mendenhall’s cross-cultural adjustment model do not correspond exactly to Oberg’s terms, their diagram presents a helpful visual for better understanding the U-curve hypothesis.

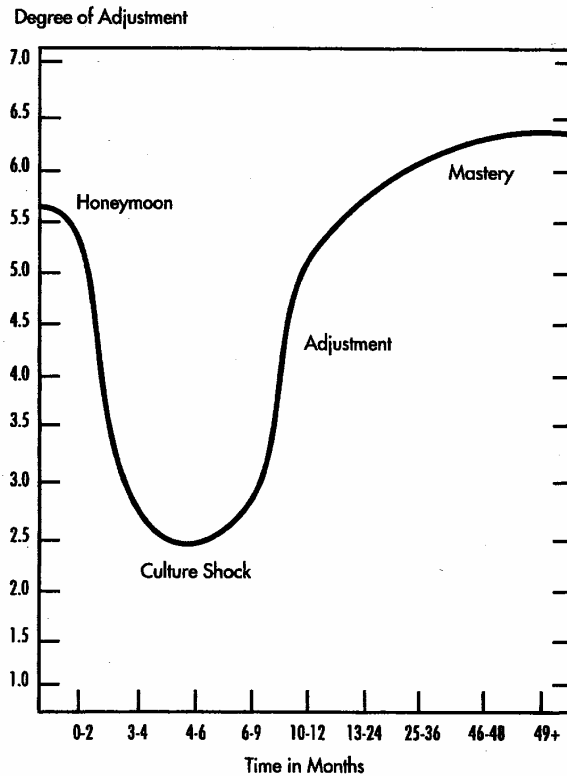


Figure 3: The U-Curve of Cross-Cultural Adjustment (Mendenhall et al. *Global Management*, p 411)

Nancy Piet-Pelon and Barbara Hornby adapt their descriptions of the stages of cross-cultural adjustment to the particular case of the expatriate spouse in their book *Women’s Guide to Overseas Living*. They try to prepare accompanying spouses for their experience in their new host country by walking them through a typical phase-by-phase scenario of culture shock tailored with examples to which expatriate spouses could easily relate. Piet-Pelon and Hornby begin with a description of the *honeymoon* stage, which

they say lasts anywhere from a few hours to a few weeks. They explain that it is a “rose-colored glasses” phase created by a mixture of “relief to have that planning, packing and saying good-bye behind you,” and the excitement of being in a new, exotic place (56). The reality of having to deal with the logistics of settling into your new environment spurs the onset of the *anxiety* stage. During this stage, the authors explain, the rose-colored glasses are shattered. Feelings of bewilderment, insecurity, frustration, and impatience overwhelm you. A constant sense of disorientation feeds your irritability as little frustrations accumulate: “the furniture does not arrive on time, the servants do not understand you, the repairs are done incorrectly, you feel cheated at the market, the directions you give are misunderstood...” (56). Feeling pressure to quickly adjust and to make a good impression only increases the feelings of anxiety. This stage usually leads into the next negative phase of culture shock, *rejection*. During this stage a rebellion occurs against the host culture which has become a scapegoat for all of your confusion and frustration. During this time you personalize every negative thing that happens: “the electrician who arrives late or is unable to repair the air conditioner is perceived as deliberately trying to make your life miserable” (57). Your feelings become polarized—everything in this new country is bad, everything back home is good. The *regression* stage, which usually goes hand-in-hand with the *rejection* stage, is a time of retreat. You avoid contact with the host culture as much as possible. If available, the expatriate community may become your safe haven. Or at a certain point, you may even leave and return home at this time, being unable to tolerate your negative feelings toward the host country’s unfamiliar and bewildering culture. Even if most expatriate spouses do stay and fulfill their assignment, they may never make it beyond this negative stage. Somehow

they find the strength to carry on but hate every moment that they have to stay in that “terrible” country. Others, however, “slowly, often painfully” manage to enter the final stage of the culture shock process, the *adjustment* stage (58). If you make it to this point, Piet-Pelon and Hornby insist that it is because you have begun to truly interact with the host culture and consequently the unfamiliar becomes more familiar and you begin to feel more comfortable. An accumulation of positive experiences helps to dissipate negativism. For instance, “the old rejection feelings that the taxi driver is cheating you tend to magically disappear when you can direct him to your destination” (59). Piet-Pelon and Hornby stress that this final stage is attained not by merely becoming familiar with your surroundings and a new language, but by becoming familiar with the culture itself—by gaining a better understanding of why people think and behave the way they do—and by being able to function satisfactorily according to its rules (59).

Not everyone in the field of cross-cultural studies agrees with the accuracy of the U-curve’s stages of cultural adjustment. Colleen Ward, Stephen Bochner, and Adrian Furnham state in their book *The Psychology of Culture Shock* that “the U-curve hypothesis appears to be largely atheoretical, deriving from a combination of post hoc explanation and armchair speculation” (80). A.T. Church goes so far as to say that the evidence for the U-curve has been “weak, inconclusive and overgeneralized” (542). Some longitudinal studies⁵ have shown that sociocultural adaptation more closely resembles a learning curve—a curve which begins with psychological distress, followed by significant improvement over the first four months, and then levels out with minor

⁵ Studies such as Ward and Kennedy, “Crossing cultures: The relationship between psychological and sociocultural dimensions of cross-cultural adjustment” (1996); and Ward, Okura, Kennedy, and Kojima, “The U-curve on trial: A longitudinal study of psychological and sociocultural adjustment during cross-cultural transition” (1998).

improvements over time—rather than resembling the U-curve which has an initial period of euphoria before plunging into culture shock struggles and then finally reversing directions with an upward climb towards successful adaptation (Landis 188).

Colleen Ward is one of the major proponents who argue that the U-curve neither adequately nor correctly describes the psychological reaction to cross-cultural adjustment. She chooses to take a different approach to the intricacies of the experience of culture shock. In her book, *The Psychology of Culture Shock*, co-authored by Stephen Bochner and Adrian Furnham, culture shock is broken down into its “ABC’s”: its *affective*, *behavioral*, and *cognitive* components. For each component, the authors discuss ways to prevent or counterbalance its negative effects. They explain that the affective component involves the confusion of being suddenly introduced into a different culture. Responses include “confusion, anxiety, disorientation, suspicion, bewilderment, perplexity and an intense desire to be elsewhere” (270). Intervention techniques include administering selection tests to predict the likelihood of successful adaptations based on personal resources (self-efficacy, emotional resilience, adaptability, etc.) and providing additional interpersonal assets such as social support-groups and mentoring. The behavioral component explains how misunderstandings arise between people of different cultures due to misinterpreting host nationals’ behavior and engaging in culturally inappropriate behavior. The main idea of this component is that the rules, conventions, and assumptions that regulate interpersonal interactions (both verbal and non-verbal communication) vary across cultures (271). Intervention includes acquiring new social skills through behavioral, culture training, mentoring, and learning about the historical, philosophical and sociopolitical foundations of the host culture. The cognitive component

is the most complicated aspect of culture shock, and the authors recognize that it is the most difficult to remediate. This component establishes that culture is based on shared meaning. There is a gap between different cultures' established "verities" because material, interpersonal, institutional, existential, and spiritual events hold different meanings for different cultures (272-73). This cognitive component of culture shock reminds us of Oberg's original definition, which identifies the core problem to be the loss of "all our familiar signs and symbols of social intercourse." To remediate this problem, a person needs to gain a better understanding of how his own culture effects the way he views life and how he interprets and assigns value to various aspects of social interaction and personal pursuits.

Ward et al's 367-page book, which carefully analyzes the psychology of culture shock in all of its complexity, may not be the best pre-departure reading for the already stressed and frazzled soon-to-be expatriate spouse. L. Robert Kohls presents a more palatable explanation of the experience of culture shock in his book *Survival Kit for Overseas Living* (originally published in 1979 and now in its fourth edition). He compares culture shock to an *illness*. "Being a foreigner," Kohls explains, "is a new and, at least for a time, uncomfortable, even threatening experience. It can produce a persistent sense of insecurity vibrating just below the threshold of unconsciousness – something like a long-term, low-grade infection, not seriously disruptive but annoyingly debilitating" (57). By using the familiar notion of being sick, Kohls is able to explain culture shock in terms of its "symptoms." He says it can cause "intense discomfort, often accompanied by hyperirritability, bitterness, resentment, homesickness, and depression. In some cases, distinct physical symptoms of psychosomatic illness occur" (92). Kohls

expounds on his diagnosis of culture shock by listing and categorizing numerous other symptoms related to this affliction (see Table 2).

Table 2: Culture Shock Symptoms (Source: Kohls, L. Robert. *Survival Kit for Overseas Living*. p 96)

Overall Symptoms	Withdrawal Symptoms	Aggressive Symptoms
Anxiety	Physical and/or psychological withdraw	Compulsive eating
Homesickness	Spending excessive amounts of time reading	Compulsive drinking
Helplessness	Need for excessive amounts of sleep	Exaggerated cleanliness
Boredom	Only seeing other Americans or Westerners	Irritability
Depression	Avoiding contact with host nationals	Family tensions
Fatigue	Short attention span	Marital stress
Confusion	Diminished productivity	Excessive chauvinism
Self-doubt	Loss of ability to work or study effectively	Stereotyping
Feelings of inadequacy	Quitting and returning to your home country early	Hostility toward host nationals
Unexplained fits of weeping		Verbal aggressiveness
Paranoia		Physical aggressiveness
Physical ailments and psychosomatic illness		Deciding to stay but permanently hating the country and its people

Kohls stresses that no two people will experience culture shock in the exact same way. For some, their “bout with culture shock is brief and hardly noticeable,” (92) while for others, its ailments will linger like a perpetual cold or flu. Kohls asserts that regardless of the mildness or severity of its symptoms, culture shock is an unavoidable part of the experience of living abroad, and there are no magic charms to escape it (101)—no vaccine to prevent it. However, Kohls does not believe that expatriates have to helplessly lie down and subject themselves to the full-force blows of culture shock. He presents a 20-step “prescription” for action which he claims will help minimize the impact of culture shock’s negative effects. The details of his prescription can be found in his book *Survival Kit for Overseas Living*, Chapter 19: “Responding to Culture Shock.”

While some of Kohls suggestions are simple to follow, such as “work at maintaining a healthy sense of humor;” others, such as “try to trace every ‘strange’ action you observe in your new culture to its underlying value or values,” are quite complex and cannot be easily carried out without additional cross-cultural understanding and preparation. In order to successfully mitigate the symptoms of culture shock, future expatriate spouses must first understand the nature of cultural misunderstandings and then be given functional strategies that will help them bridge the gap between their own culture and the culture of their host country.

CULTURAL MISUNDERSTANDINGS

Cultural misunderstandings are the actual incidents that create and perpetuate the ailments of culture shock. They include all of the unsuccessful cross-cultural encounters that result in misplaced judgments, erroneous conclusions, and rashly formed opinions. The roots of these misunderstandings sprout from the universal, human characteristic of *ethnocentricity*, meaning that every person inherently believes in the superiority of his own ideas and culture, and furthermore, believes that they would be recognized as superior by any other informed, rational human being. If everyone has this same belief about his respective culture, it is no wonder that cross-cultural communication can be very difficult. Hofstede claims that by the age of ten, children have unconsciously adapted the encoding of their native culture, and their basic value system is firmly established (8). Since we are enculturated (trained in the values and behavior of our parent society) at a very young age, our culture becomes a fundamental part of our identity. We view it as a compilation of verities that we seldom call into question. In

Raymonde Carroll's explanation of cultural learning, she emphasizes that we learn to "breathe this logic;" we find our culture so natural that it becomes transparent (3).

When we experience a cross-cultural encounter that results in conflict, our natural tendency is not towards cultural analysis of the situation where we would call into question each other's culturally based assumptions; rather, we instinctively shift the blame to the personal characteristics of the other person. We might conclude that "so-and-so is a rude person," or we may even generalize our feelings by thinking that "the French (or the Japanese, Indians, etc.) are a rude people." Intellectually, we understand that different cultures exist in the world. We see the wide variety of customs, dress, cuisine, and so forth in the media all of the time. Yet this knowledge of difference is not strong enough to counter our naïve assumption that "there are sufficient similarities among peoples of the world to make communication easy" (Barna 173). We hold to the belief that deep down, people really are similar, because this thought is comforting and permits us to maintain a false sense of confidence in unfamiliar and unsettling situations.

Bringing the discussion back to the specific case of the expatriate spouse, without adequate cross-cultural training, the expatriate assignment is threatened by an overload of cultural misunderstandings which may eventually be the cause of adaptation failure. An expatriate spouse does not naïvely embark on an international adventure thinking that everything is going to be exactly the same in her host country. In fact, responses from my survey of American expatriate spouses in France showed that one of the most appealing aspects of accepting an international relocation was being able to discover a new culture and to expand their mind with new ideas and perspectives. Yet at the same time, most of these accompanying spouses got on their plane without comprehending exactly how

difficult their cross-cultural adaptation was really going to be. Craig Storti, author of *The Art of Crossing Cultures*, begins his book by saying that most people who agree to live abroad *want* to adapt to the local culture...and yet most of them do not (1st ed. xiii). He explains that this failure results from the unexpected difficulty of dealing with unfamiliar behavior. Storti reveals that the cause of this problem lies in the fact that we expect everyone to be basically the same as we are. It is difficult to fathom a different “reality” constructed from different symbolic interpretations. This oblivious mindset results in what Storti refers to as “cultural incidents.” Storti develops his discussion of culture misunderstandings by breaking down these cultural incidents into Type I incidents (a cultural affront from the viewpoint of the expatriate) and Type II incidents (a cultural affront from the viewpoint of the host national). He explains that the expatriate’s natural reaction to a continuous series of these cultural incidents is to become discouraged and angry, and to progressively withdraw from the society who is inflicting this intense discomfort. Figure 4 shows the pathway which leads to withdrawal. The alternative pathway will be explained later.

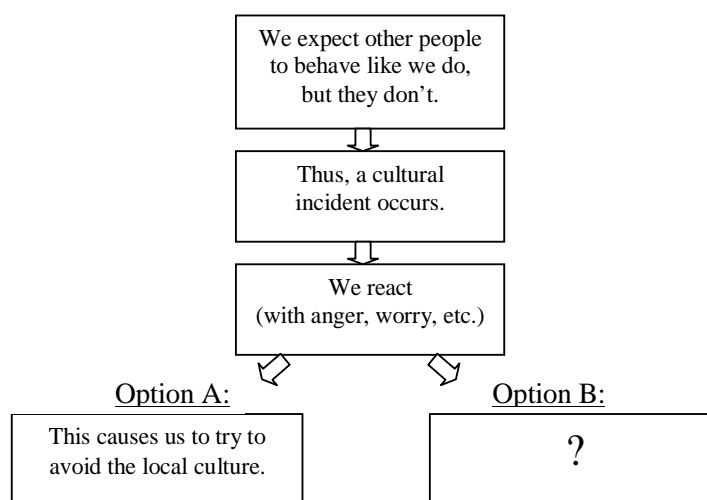


Figure 4: Storti's Withdrawal Diagram (a rendition of his diagram in *The Art of Crossing Cultures*, 2d ed. p 72)

Avoidance of the local culture can take place at several levels. For some expatriate spouses, it may simply be a tendency to avoid engaging in deep conversations with new people at a cocktail party. For others, they may try to limit nearly *all* of their interactions with people of the local culture. A quote from Hilary Mantel, written in “Last Morning in Al Hamra” *Spectator* 24, January 1987, uses a vivid metaphor to describe an extreme case of expatriate withdrawal and refusal to engage in productive cross-cultural exchanges:

There are children, frail and moribund, who live inside plastic bubbles; their immune systems have not developed, and so they have to be protected from the outside world, their air specially filtered, and their nourishment passed to them through special ducts, by gloved and sterile hands. Professional expatriates live like that....They carry with them the plastic bubble of their own culture, and nothing touches them until it has been filtered through the protective membrane of prejudice, the life-support system that forms their invisible excess baggage when they move on, from one contract to the next, to another country and another set of complaints. (Storti 126)

Referring back to Figure 4, we can see that withdrawal is not the only option available to expatriate spouses as a response to cultural misunderstandings. At the point of frustration, after a cultural incident has occurred, there is a fork in the road. The easy and natural reaction is to withdraw and avoid the local culture, but the other pathway, albeit more difficult, can lead to successful cross-cultural adaptation. In order to travel down the pathway of adaptation, an expatriate spouse needs to be equipped with a few

strategies that will enable her to successfully deal with the cultural misunderstandings that she will unavoidably face during her stay in a foreign country.

STRATEGIES FOR DEALING WITH CULTURAL MISUNDERSTANDINGS

Since people naturally and even unconsciously engage in symbolic misinterpretation of other cultures (which results in the previously mentioned ailments of culture shock), it is important to prepare expatriates to recognize, cope with, and then avoid these errors. Storti affirms that “the unknown is inherently unsettling...To be ignorant of a foreign culture is, in the end, to fear—and therefore dislike—it” (1st ed. 43). The only way to dispel ignorance is through active study and learning. Cross-cultural training, whether it is attained through a highly structured seminar with a series of workshops or accessed through personal study of literature available in this field, will provide the best means to facilitate adaptation to living in another culture. Three of the most helpful and applicable strategies that I have discovered during the course of this study, and which I believe would most readily help expatriate spouses to successfully deal with cultural misunderstandings, are found in Milton Bennett’s article “Overcoming the Golden Rule: Sympathy and Empathy,” in Craig Storti’s book *The Art of Crossing Cultures*, and in Raymonde Carroll’s translated book *Cultural Misunderstandings*. Each of these works provides slightly different approaches to unraveling the confusion and difficulty of trying to live in a culture other than one’s own.

“Overcoming the Golden Rule: Sympathy and Empathy”

Therefore all things whatsoever ye would that men should do to you, do ye even so to them (Matthew 7:12). This Christian version of the Golden Rule is common to nearly all of the major religions in the world, and most people try to live by its precept. Bennett explains, however, that the underlying assumption of the Golden Rule—that

other people *want* to be treated as I do—normally remains unacknowledged due to an even deeper, unstated assumption that “all people are basically the same, and thus they really *should* want the same treatment (whether they admit it or not) as I would” (191). Bennett focuses on the problem of intercultural communication in terms of using empathy instead of sympathy. Since these two words have various definitions, Bennett begins his article by setting up the specific definitions of these words to be used for his discussion. A sympathetic person tries to place himself in someone else’s shoes and imagines how *he* would feel in a given situation. On the other hand, an empathetic person tries to imagine the thoughts and feelings of another person from *that person’s perspective*. Sympathy, Bennett stresses, is not an effective tool during intercultural communication, because it is insensitive to difference (202).

Bennett outlines a six-step model aimed at helping people develop empathetic skills, thereby being able to better handle and avoid cultural misunderstanding. His first step, *Assuming Difference*, provides the motivation and acknowledged need to empathize. Step two, *Knowing Self*, is a preparatory step that involves gaining a better understanding of one’s own identity (individual values, assumptions, and beliefs) which provides an assurance to counter the fear of “losing oneself” while engaging in empathy. Step three, *Suspending Self*, requires that the knowledge gained in step two be temporarily set aside—a task that Bennett asserts is “easier said than done” (210). This step allows for expanding the self-boundary and experiencing that which formerly was “outside” of oneself. Step four, *Allowing Guided Imagination*, specifies the need to not actively think ourselves towards empathy (a self-focused activity), but rather to allow our imagination to be captured by the other person, just like what often happens while watching a play or

reading a novel. At this point we are ready for step five, which is *Allowing Empathetic Experience*. During this step we are actually able to “perceive a different set of feelings and thoughts about the world” (212). The final step, *Reestablishing Self*, needs to occur in order to “re-creat[e] the sense of separateness between self and other that is the normal state in this culture” (212). Bennett summarizes his argument by proposing a “Platinum Rule” to replace the “Golden Rule,” for the purpose of intercultural communication. The “Platinum Rule” states, “Do unto others as they themselves would have done unto them” (213). Having Bennett’s “Platinum Rule” as a new mantra will not automatically ensure a successful cross-cultural adaptation, but it would definitely help an expatriate spouse put herself on the right path.

The Art of Crossing Cultures

Storti’s explanation of cultural incidents, touched on earlier in this chapter, showed us that the natural response to cultural misunderstandings is to start avoiding the local culture. In its most extreme case, expatriates will retreat to their home country and become, according to Storti, “cultural casualties.” Yet withdrawal is not the unavoidable result of living in a foreign culture. Storti dedicates the majority of his book to explaining techniques that would allow an expatriate to successfully take a different path. The flowchart shown in Figure 5 displays this other pathway and summarizes the main steps in his cultural adaptation techniques. His proposed solution involves training ourselves to become aware of our feelings of disgust and agitation during a moment of cultural discomfort. Being able to take a step back and analyze the cause of our reaction is the process that allows our feelings to be controlled and neutralized, thus putting us in a position to observe and truly *experience* the situation. Storti claims that once we are free of our subjective reactions, we can effectively experience another culture and adapt to it.

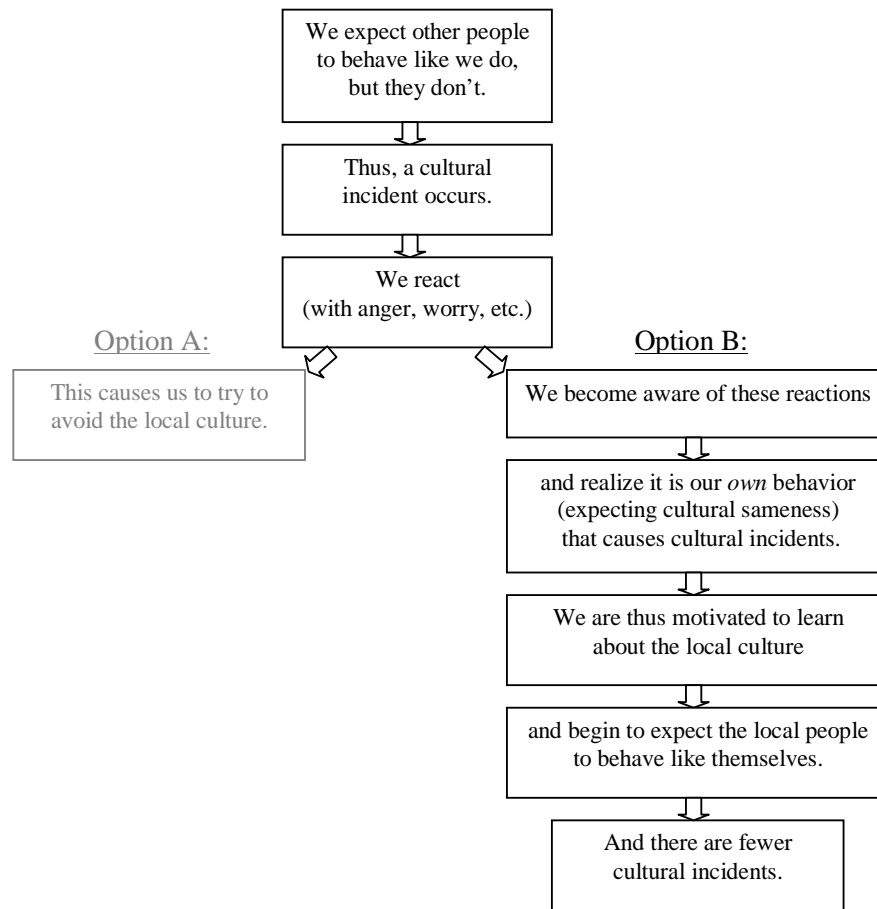


Figure 5: Storti's Diagram for Successfully Crossing Cultures (a rendition of his diagrams found in *The Art of Crossing Cultures*, 2d ed. p 72, 85)

Cultural Misunderstandings

Raymonde Carroll also presents a functional approach to cultural adaptation in her book, *Cultural Misunderstandings*, but with a specific application to the French-American experience. Being a French anthropologist married to an American anthropologist, Carroll is able to present a unique perspective on cultural analysis that she gained through both professional and personal experience. She uses her experiences on the island of Nukuoro (an atoll in the Pacific) to breach the topic of cultural misunderstandings. Her brief presentation of drastically different cultures enables her readers to grasp the notion of different symbolic interpretations of social interactions. For

instance, shortly after Carroll's arrival on the island, the chief of the village proclaimed that he had decided to adopt their infant child! Carroll's reaction to this cultural misunderstanding is used as a springboard for her approach to cultural analysis. Carroll shows her readers how to adopt a method that will lead to a better understanding of the challenges faced in French-American, interpersonal relationships—the most significant area of cultural misunderstanding. She guides her readers to recognize, and then teaches them how to approach, high-risk culture shock situations. Her recommended method includes five steps that will allow a person to properly conduct cultural analysis. These are the techniques to which Carroll herself adheres in her anthropological work:

1. *Clearing the deck* – she avoids engaging in any analysis that aims to find the “deep-rooted” reasons for cultural specificity, such as psychological, geographical, economical, religious, or historical explanations. Carroll defines cultural analysis, in its pure form, to be the endeavor to “understand the system of communication by which meaning is produced and received within a group” (6).
2. *Being on the lookout* – she begins by examining her own discourse to become aware of how she is placing value judgments on another culture. Statements like “The French are...(insert negative adjective)” or “The French have no sense of ...” don't actually *describe* the French, but rather *reproach* the French for their shortcomings in the absence of one's own culture. Once recognized, this behavior should be avoided (6).
3. *Examining the details* – this process takes a considerable amount of effort because we often remember the details of an event according to an interpretation that we have already given to it. In the beginning stages of our cultural analysis, in efforts

to counter this subconscious tendency, Carroll suggests jotting down all the details of a situation with a conscious effort of detachment (7).

4. *Imagining a universe in which what was “bizarre” becomes “normal”* – the actual analysis of a “cultural text” (which can take almost any form) requires finding a valid interpretation that can be verified by being asserted elsewhere, in different contexts, within the same culture (7,8).
5. *Analyzing other experiences* – any proposed interpretation needs to be confirmed by analyzing other experiences through “written texts (newspapers, novels, advertisements, civil codes), or oral texts (tales and legends, films, conversations)” (9). “The challenge consists of uncovering how ‘texts’ which belong to the same culture but which appear to be different (entering a house and having a conversation, for example) can affirm the same truth, [and] can be two equally valid expressions of the same cultural proposition” (143).

The cultural adaptation strategies presented by Bennett, Storti, and Carroll offer valuable techniques that can assist expatriate spouses in having a successful adaptation to their host country’s culture, and yet they do not provide a magical solution. None of these authors allude to the notion that their approaches could be easily carried out. On the contrary, they each insist that cross-cultural understanding requires a great deal of effort. Carroll emphasizes this point by saying “we must compel ourselves to enter the logical universe of the other through an enormous effort of the imagination” (124). The most difficult step in overcoming cultural misunderstandings is actually *learning about the other culture*. Paging through a few cultural books or making rash conclusions from half a dozen personal experiences will not allow for an accurate understanding of a new

culture. Even when trying to be more thorough in one's observations and conclusions, a person's own cultural prejudices get in the way and cloud one's vision. In order to be able to temporarily "suspend the self" while conducting cultural analysis, I propose teaching prospective expatriate spouses how to adopt a new mindset for the purpose of learning about another culture. The following chapter will describe the details and implications of this solution.

CHAPTER 3

PROPOSED SOLUTION: ASSUMING THE ROLE OF ANTHROPOLOGIST

DEVELOPING A NEW MINDSET

Since our worldview is filtered through the perspective ascribed by the hidden aspects of our culture (“little c culture”), it is nearly impossible to make completely objective observations of another culture. More often than not, our conclusions about another culture are heavily tinted with ethnocentrism and severely skewed by cultural misinterpretations. Without proper preparation and training, attempts to understand another culture result in either acknowledged failure or illusionary triumph. Gilles Asselin and Ruth Mastron illustrate how our perception of the world is tinted by our respective cultures via a clever analogy in their book *Au Contraire! Figuring Out the French*:

Imagine for a moment that all Americans are provided with yellow sunglasses. No one notices them as anything special because everyone has them. What makes the sunglasses yellow is the unique set of values, attitudes, beliefs, and assumptions that Americans have in common. The yellow lens thus represents “Americanness.” In France, everyone is also provided with sunglasses, but the sunglasses are blue. More and more people are aware of these kinds of dissimilarities in perception and mindset between people from different cultures. But often, when Americans are traveling to France, for instance, they believe all they have to do is acquire some blue sunglasses in order to learn about French

culture, to see and understand the “real” France. They are then convinced when they come back that they *do* know French culture—and it’s green!

(145)

Our natural tendency is to evaluate another culture while being oblivious to our culturally filtered perspective. Some people do not even acknowledge the *existence* of “tinted sunglasses,” let alone recognize that they are constantly wearing their own pair of them. By expanding Asselin and Mastron’s colored-lens analogy, the objectives of cross-cultural training can be explained as helping prospective expatriate spouses do the following: acknowledge the existence of “tinted sunglasses,” realize that they are constantly wearing a pair of these glasses, understand some of the values, attitudes, beliefs, and assumptions that give their glasses their specific tint as well as those that give their host culture’s glasses a different tint, and accept the fact that to accurately view a different culture they need to temporarily “remove their tinted sunglasses.” While *completely* removing one’s “cultural glasses” may be unachievable, it is possible to find ways to sufficiently suspend oneself (one’s typical reactions, perceptions, feelings, and judgments) so as to be able to engage in productive cross-cultural learning.

As a means to create emotional distance from one’s normal mentality, I propose teaching expatriate spouses to adopt a new mindset while they endeavor to discover and adapt to their host country’s culture. This new mindset involves assuming the role of anthropologist—just like an actor would assume a temporary role in a play. In response to this proposal, the first questions most likely to be raised are, “Why should an expatriate spouse pretend to be an anthropologist?” “What good would come of such a charade?” Adopting the role of anthropologist would not only give an expatriate spouse a

buffer zone from the intense emotions normally experienced during culture shock, but that by undertaking the job description of an anthropologist, she would also be motivated to step out of her comfort zone (or the safe haven of her home) and explore the new culture around her.

I do not wish to insinuate that an expatriate spouse should play the role of anthropologist continually throughout her international sojourn. Trying to constantly function at a level of emotional detachment and armchair speculation would not be very feasible or even desirable. Taking on the role of anthropologist should simply be a means to engage in more effective cultural analysis to combat cultural misunderstandings and can be limited to this function. This particular mindset would give an expatriate spouse the detachment she needs to resist taking personal offense during cultural misunderstandings and then withdrawing from the host culture. With the mindset of assuming the role of anthropologist, quite the opposite reaction would take place. Her newly focused curiosity and determination to uncover the mysteries of a different culture would inspire her to make more observations, ask more questions, and progressively come to a better understanding of her host's culture. By better understanding this new culture, she will more likely be able to adapt to it.

Encouraging expatriate spouses to assume the role of anthropologist will undoubtedly raise other questions as well, due to preconceived notions of what anthropology entails. Questions such as, "Doesn't anthropology mainly concern itself with discovering primitive cultures tucked away in the deep jungles of the Amazon or in the remote savannas of Africa?" "Isn't its goal to uncover what mankind is like in his 'natural state,' unscathed by civilization?" "What valid, anthropological conclusions

could an inexperienced, untrained, expatriate spouse actually make anyway?” These concerns stem from a narrow view of anthropology. Based on its Greek etymology, *anthropology* simply means the “study of man.” It is not limited to the study of “primitive” or even “non-Western” civilizations. France, for instance, is a perfectly valid place for an American to conduct an anthropological study. In fact, it may be more essential to approach the French culture in this manner due to the commonly accepted belief that the French are exactly like us...except for speaking a different language and eating a different cuisine. Americans with this inappropriate mindset could easily take offense from certain culturally misunderstood French behavior, resulting in labeling the French people as “rude,” “snotty,” or “backwards.” Ironically, having an open mind is in some ways easier when facing a culture whose observable customs are drastically different from one’s own, rather than dealing with a culture whose outward appearances seem quite familiar. Cross-cultural trainer and author Polly Platt attests that a proper mindset is essential for anyone trying to adapt to life in France. She addresses this issue in her article, “Don’t be intimidated by the French,” wherein she suggests the following: “Pretend that the French wear a bone in their nose. Many Americans think it would be helpful if they did; then you’d be prepared for a place more complex and confusing even than Japan” (*BonjourParis.com* 2/17/2004).

Once a person can acknowledge the value of anthropology in discovering another “Western” culture, the next hurdle is believing that an expatriate spouse can carry out this study herself, without necessarily having received a university degree in anthropology. Lévi-Strauss, a French anthropologist renowned for his structural work in the mid-twentieth century, has a good reply to this concern. He states in his book, *Tristes*

Tropiques, that ethnography (a branch of anthropology) is one of the rare, authentic vocations that a person can discover within himself without ever having been officially taught it (57). Despite Lévi-Strauss' reassurance, I am not suggesting that an expatriate spouse should simply be thrown into her host country's culture and be expected to effectively function as a bona fide anthropologist. Even if she is "a natural" for this role, she should not be expected to perform without a "dress-rehearsal." Pre-departure, cross-cultural training is indispensable in providing expatriate spouses with the necessary preparation and instruction to be able to adopt this new role, as well as affording them the opportunity to practice their cultural-analysis techniques under the tutelage of a trainer.

PRE-DEPARTURE PREPARATION

My proposed solution for helping expatriate spouses to increase their chances of successful cross-cultural adaptation does not require a revolutionary change in the content of pre-departure preparation. The typical cross-cultural training seminar already provides most of the essential information and eye-opening points of view that expatriate spouses would need to adopt this new mindset. Adding the focus of donning an anthropological role would simply add more motivation and purpose to expatriate spouses' cross-cultural learning process. My solution emphasizes the crucial need for expatriate spouses to receive adequate pre-departure culture and language training. Often this training is considered to be secondary to all of the other pressures associated with international-relocation preparation. Some sponsoring organizations merely throw in a cross-cultural workshop as an added perk, not recognizing it as part of the most important assistance they could offer their expatriates, especially the accompanying spouses. One of the factors working against pre-departure training is the short time frame that is typically

given to expatriates to prepare for their relocation. The average preparation time that my twenty research subjects had to prepare for their move to France was 3-4 months. Often expatriate families do not even have this long to prepare for their international relocation. With this meager allotment, expatriate spouses tend to get caught up in the physical preparations that need to be made (the sorting, storing, and packing of their personal belongings; making decisions about housing, schooling, transportation, etc.), responsibilities which usually fall most heavily on the expatriate spouse's shoulders. As she is weighed down by all of this planning, she often feels that she cannot allocate very much time to her mental and emotional preparation, including any language or cultural preparation—even if training classes were to be arranged and paid for by the sponsoring organization (Piet-Pelon 24).

Ideally, multinational companies would improve this situation by offering their expatriates more advanced notice of their international relocation. Yet, as global relocation trends indicate, expatriate assignments are becoming even more rushed. In response to recent economic strains, multinational corporations have been reducing expatriate assignment durations as well as limiting policy offerings (GMAC 5). This being the case, the need to improve pre-departure preparation to maximize its benefits, in a short amount of time, is all the more vital. Most multinational companies, however, may not view pre-departure preparation as very beneficial. If human resource managers do arrange for cross-cultural and language training for their expatriates, they often opt for in-country training, thinking that it would be more applicable and effective. Recent research, however, has shown that in-country training comes too late to significantly affect adaptation levels. The Interchange Institute's research report, "Many Women

Many Voices: A Study of Accompanying Spouses Around the World,” concludes that women who had pre-departure training and support had better adjustment than those who only had post-arrival assistance (49). This study specifically examined the role of pre-departure language training and found that “having language training later did not make up for this difference [in adjustment]” (49). Their proposed explanation for this finding is that knowing the host language entails being able to better communicate and fit into the host culture. This research supports the idea that arriving in one’s host country with language skills and cross-cultural awareness would put a person on a good path towards successful adaptation. Without adequate pre-departure preparation, an expatriate spouse risks initially experiencing an overwhelming series of cultural incidents which may negatively impact the rest of her international experience.

Once the value of pre-departure training is recognized, its content is the next topic of interest. With regards to implementing my solution, an expatriate spouse would first need to have a good knowledge of who she is before attempting to assume the role of anthropologist for the purpose of cultural analysis. As with any transition in life—whether it is moving away from home to attend college, getting married, or becoming a parent—having a firm sense of self helps to ease the transition process. Debra Bryson and Charise Hoge, both licensed, clinical social workers and multi-experienced expatriates, wrote *A Portable Identity: A Women’s Guide to Maintaining a Sense of Self While Moving Overseas* as a guide for women who accompany their spouses on international assignments. Their book presents information on how an overseas move can affect a woman’s identity and what choices she can make to have a happier and more meaningful experience. Bryson and Hoge share their personal experiences as expatriate spouses,

focusing on how it affected their identity at different stages of their adaptation process. As they recount the difficulties of living overseas, they also explain the empowering decisions a woman can make in order to be happy during this transition. Bryson and Hoge engage their readers in workbook-type activities by having them write out answers to certain questions and create their own diagrams to help them better understand the facets of their identity and the areas that will be affected by their international relocation. Blank lines and entire pages are reserved for this active participation.

A Portable Identity is an excellent resource to help an expatriate spouse more fully understand herself. It can guide her in formulating her identity in terms of internal views of self (the way she views herself—her beliefs, values, attitudes, likes and dislikes), external views of self (the way others see her, societal influences, and the impact of her cultural upbringing), as well as various roles and significant relationships that contribute to her identity. Pre-departure preparation needs to particularly focus on the impact that culture has on a person's identity. Cross-cultural analysis can only take place if an expatriate spouse first has a good sense of her own culture and its influence on her values and outlooks on life. Edward Stewart and Milton Bennett dedicate their book, *American Cultural Patterns: A Cross-Cultural Perspective*, to helping Americans better understand their culturally based assumptions and values. One cultural bias that has a big impact on Americans' ability to adapt to life in a foreign culture is that Americans tend to respond to similarities between different cultures, rather than differences. "Americans do not typically appreciate that each society incorporates a full range of cultural variations" (Stewart 11). This mentality becomes problematic when failing to recognize cultural differences leads to interpreting tense situations as social conflict rather than cultural

misunderstanding (Stewart 29). Intercultural trainers have developed numerous workshop activities that help enlighten people about their subconscious values and cultural assumptions. Cross-cultural seminars can be an effective way to become aware of one's cultural patterns. Appendix B displays a summary of American cultural assumptions and values compared to other cultures. This table offers a glimpse at the pervasive nature of our cultural conditioning.

Often sponsoring organizations think that providing their expatriates with a list of “dos and don'ts” regarding appropriate behavior in their host country will adequately prepare them for the majority of the cultural clashes they will face. This information may help expatriates to avoid some taboo behavior and awkward situations; however, its usefulness is very limited because it completely ignores contextual variation. Stewart and Bennett find this practice harmful. They insist that “the illusions of mastering desirable and taboo actions places blinders on Americans and foreigners alike, invites inflexibility, and falls short of equipping them for effective interaction” (15). LaRay Barna also recognizes the disadvantageous nature of “dos and don'ts” lists. She writes in her article, “Stumbling Blocks in Intercultural Communication,” that having the false notion of knowing exactly what to expect can “blind the observer to all but that which confirms his or her image” (179). Since it is impossible to cover every context and contingency of appropriate behavior, it is better to arm future expatriates with a workable strategy to engage in their own progressive cultural analysis, rather than try to give them a PowerPoint® presentation with bullet points of exactly what they need to know about a given culture.

Creating and perpetuating “dos and don’ts” lists is an illustration of our tendency to stereotype. This typical human practice stems from a psychological resistance towards ambiguity. We want a quick fix for the sense of helplessness that arises in intercultural situations in which we are unable to understand and interact with people beyond our comprehension (Barna 181). Stereotyping inevitably leads to overgeneralization and false conclusions. Stereotypes assume that all members of a group possess the same characteristics. However, in intercultural communication it is necessary to make *cultural generalizations*. Milton Bennett explains in his article, “Intercultural Communication: A Current Perspective,” that unless we engage in this practice when presented with intercultural situations, “we may fall prey to naïve individualism, where we assume that every person is acting in some completely unique way. Or we may rely inordinately on ‘common sense’ to direct our communication behavior” (6). Common sense, as Bennett points out, is only *common* within a particular culture and fails when applied across cultures. Bennett stresses that it is possible to avoid stereotypes by maintaining the idea of *preponderance of belief*. He suggests that cultural generalizations be used as working hypotheses that need to be continually tested and reevaluated for accuracy. Engaging in this practice can give expatriates the benefit of recognizing cultural patterns, without promoting a “hardening of the categories [of stereotypes]” (7).

One of the main goals of pre-departure training should be to assist an expatriate spouse in forming sound cultural generalizations about her host’s culture. Rather than supplying a simplified list of “dos and don’ts”, a cross-cultural trainer needs to help an prospective expatriate spouse discover information about her host’s culture that she will be able to use as working hypotheses as she progressively comes to a deeper

understanding of that culture. A good starting point for forming cultural generalizations is to read books that have been dedicated to that purpose. Table 3 present a list of books whose authors share their cultural insights about French culture. Each of these authors offers well-researched information and helpful anecdotes that could help an expatriate spouse better adapt to life in France. This list is by no means all-inclusive, yet these books have particularly impressed me with their content. *Cultural Misunderstandings: The French-American Experience* and *Au Contraire!: Figuring out the French* contain particularly helpful introductions that instruct their readers in cross-cultural analysis, thereby providing information that would assist an expatriate spouse in adopting her anthropological role. Furthermore, the most frequently cited books that my research participants found to be helpful in their cultural adjustment are *French or Foe?* and *French Toast*. Cross-cultural trainers should not expect their prospective expatriate spouses to have time to read dozens of books, but they can point them towards the best literature and encourage them to read an appropriate amount based on their circumstances and goals.

Table 3: Recommended Readings for Gaining a Better Understanding of French Culture

<i>And God Created the French</i> (1997) by Louis-Bernard Robitaille	<i>French or Foe?</i> 3d ed. (2003) by Polly Platt
<i>Au Contraire!: Figuring out the French</i> (2001) by Gilles Asselin and Ruth Mastron	<i>French Toast</i> (1999) by Harriet Welty Rochefort
<i>Bloom Where You're Planted: How to Live in France</i> (a yearly publication) by the "Women of the American Church"	<i>The Idea of France</i> (2001) by Pierre Birnbaum
<i>Chez Vous en France – Living and Working in France</i> , 3d ed. (2004) by Geneviève Brame	<i>Living, Studying, & Working in France</i> (1999) by Saskia Reilly and Lorin David Kalisky
<i>Cultural Misunderstandings: The French-American Experience</i> (1988) by Raymonde Carroll	<i>Paris to the Moon</i> (2000) by Adam Gopnik

<i>Culture Shock! France</i> 2d ed (2003) by Sally Adamson Taylor	<i>Sixty Million Frenchmen Can't Be Wrong</i> (2003) by Jean-Benoit Nadeau and Julie Barlow
<i>Fragile Glory: A Portrait of France and the French</i> (1990) by Richard Berstein	<i>Savoir Flair!</i> (2000) by Polly Platt
<i>The French</i> (1982) by Theodor Zeldin	<i>When in France, Do as the French Do</i> (2002) by Ross Steele

Language instruction is another key part of pre-departure training. Language lessons can be considered a subcategory of cross-cultural instruction. The most obvious benefit of foreign language skills is being able to communicate more easily with host nationals and not having to solely rely on others' ability to speak English. A less frequently recognized aspect of language is its role in organizing reality and guiding our social experience; it is a "system of representation for perception and thinking" (Stewart 45). Benjamin Whorf explains that it is by means of the linguistic systems in our mind that we perceive and categorize phenomena (213). Learning to speak a different language will actually enable a person to make new observations and distinctions that were previously unperceivable. Learning the language of a certain culture can give a whole new perspective and meaning to the events and interactions that take place within that culture. A person will no longer be limited to his native-linguistic categories of explanation. As Joseph Barry, author of *The People of Paris*, put it, "in another language, you not only say things differently, you say different things" (Taylor 46). A very revealing intercultural exercise is to take note of what words do and do not exist in different languages.

Along with learning the host country's language, it is important for expatriates to be aware of differences in non-verbal cues. Instruction in a culture's paralinguage

(everything that accompanies speech, such as the pitch, stress, volume, and speed of speech, as well as body language) is just as important as language instruction. Milton Bennett explains that “frequent misunderstandings arise in intercultural communication at the paralanguage level because we may be oblivious to an intended cue, we may perceive a cue that was unintended, or we may simply misinterpret the meaning of a certain paralanguage cue” (Intercultural Communication 18-19). Edward T. Hall, a widely respected expert in intercultural relations, emphasizes the significance of non-verbal communication by stating, “80 to 90 percent of the information we receive is not only communicated nonverbally but occurs outside our awareness” (Hidden Difference 53). Fortunately, many non-verbal cues can still be recognized among different cultures. Initially, only the major differences need to be acknowledged and understood according to their intended meanings. Given more time and experience, additional cultural analysis would lead to a discovery of the more refined nuances of a culture’s non-verbal cues.

The amount of instruction that “adequate” pre-departure training should include seems overwhelming. In order to confidently embark on an international assignment, should an expatriate spouse feel like she needs to read a 3-foot-high stack of books or sign up for a seminar load equivalent to a full semester of university courses? This expectation would not be reasonable or even appealing, from an expatriate spouse’s perspective. Ideally, expatriate spouses would be provided with a personal trainer who could progressively present her with cross-cultural information and cater the instruction to the expatriate’s particular needs, goals, abilities, and time constraints. A personal trainer, who would need to have a deep understanding of both the expatriate spouse’s culture and her future host’s culture, would be able to teach a soon-to-be expatriate

spouse how to properly conduct cultural analysis, thereby arming her with a valuable adaptation skill. My proposed solution of teaching expatriate spouses to assume the role of anthropologist mainly comes into play in the presentation and motivation of her cross-cultural instruction. By having the mindset of preparing for a performance, she will be more receptive to adopting points of view which were previously outside of her framed reality and will be eager to practice her new role while being coached by her trainer.

DRESS-REHEARSAL

Just as actors in plays always have dress-rehearsals and aren't expected to perform without having had the opportunity to practice, the same principle applies to prospective expatriate spouses. They need to practice their role of anthropologist before they go overseas, otherwise their performance upon arrival in their host country risks being a flop. Their cross-cultural education, whether it comes from seminars or independent study, provides an expatriate spouse with her "script," but a personal trainer, who is specialized in the cross-cultural issues between the expatriate's native culture and her host country's culture, can actually help create a "practice stage" where an expatriate spouse can develop her cross-cultural sensitivity and experiment with conducting cultural analysis.

Exactly how can a "dress-rehearsal stage" be created? Setting the stage for cross-cultural analysis requires the use of authentic input. Authentic input can be gleaned from numerous sources, whether they are readable, audio, visual, or palpable, or a combination of these attributes. The only requirement is that a given source would provide an accurate depiction of what an expatriate spouse should expect to encounter in her host country. A cross-cultural trainer should use a variety of authentic inputs to create an effective

practice stage for prospective expatriate spouses. The precise details of what sources should be used and how exactly a cross-cultural trainer should present these materials is an area that still needs to be studied and put to experimentation. In the meantime, we can learn from ideas that others have had.

Ellen Summerfield proposes using film to create, in her words, a “cross-cultural laboratory.” She finds abstract discussion of stereotypes, ethnocentrism, discrimination, and acculturation to be “flat and uninspiring;” while on the other hand, “if we *experience* intercultural contact with our eyes and ears, we begin to understand it” (1). Her book, *Crossing Cultures Through Film*, offers concrete tools to help international and intercultural educators incorporate film into their teaching in fields such as ethnic studies, anthropology, communication, education, ESL, history, international business, and foreign languages. One of Summerfield’s examples is a BBC production entitled *Crosstalk* (1982) which illustrates how unrecognized conventions and hidden mechanisms of speech (in other words, *paralanguage*) can create cultural misunderstandings and misplaced stereotypes. *Crosstalk* demonstrates this problem in a poignant scene that takes place at a bank in England between a British teller and an Indian customer. The Indian customer carries out a simple transaction using exactly the same words as the British customer before him; however, due to his different tone and intonation, which stem from his native language, a cultural misunderstanding occurs as follows: The British teller hands the Indian customer a form to fill out; he responds, “No, no. This is the *wrong* one.” The emphasis on the accusatory word “wrong” along with other aspects of his unfamiliar intonation causes the teller to respond irritably, “Well,

why didn't you say so in the first place?" Summerfield recounts how the narrator in the film analyses this situation and highlights the cultural misinterpretation:

What apparently is a normal speech pattern for an Indian speaker of English and not meant to be impolite in the least is interpreted by the British speaker as pushy and accusatory. Significantly, the teller is not aware of why he is becoming annoyed. He might falsely draw inferences about the Indian's character simply because his English ear is unaccustomed to the way the Indian's voice rises and falls. (89)

Films such as this one, which are created specifically for the purpose of cross-cultural instruction, can be very helpful. Any film from the host country, however, can be used to practice cultural analysis, especially while under the guidance and direction of a cross-cultural trainer. Even if the expatriate spouse's foreign language skills are not sufficiently developed to be able to understand all of the dialogue in a film, many other aspects of the target country can be analyzed. For instance, Laurence Wylie, a Harvard professor, found the manner in which French people carry themselves to be culturally revealing. In his publication, *Beaux Gestes: A Guide to French Body Talk*, Wylie remarks that the French "seem to be in control of their muscles in a way the relaxed Americans are incapable of achieving" (Zeldin 41). Other cultural observations that can be made through film include a focus on social interactions (personal distance, gestures, facial expressions, conversation dynamics, signs of differentiation with regards to social status, etc.), appropriate etiquette (during meals, when introducing oneself, at social gatherings, etc.), and attitudes towards various religious, educational, and political institutions.

While film is a particularly good practice-medium for cultural analysis due to its dynamic, multi-sensory attributes, other *cultural texts* can be very helpful at creating a “practice stage” as well. A cultural text can include any source from which a person can glean cultural understanding. Films are one type of cultural text, as are cartoons, comic strips, photos, billboards, magazines, newspapers, advertisements, websites, novels, legends, songs, radio broadcasts and even people themselves. Novels provide a particularly accessible “practice stage” for anthropological study and present an already familiar analytical exercise. Great novelists typically engage in telling a story in which the reader must figure out the real causes and effects of certain events; this is a great mental exercise for cultural analysis. Storti offers a list of novels at the end of his book, *The Art of Crossing Cultures*, which he suggests reading because they contain “more than the usual amount of cross-cultural observation and reflection” (115). His selection includes works such as *Growing* by Leonard Woolf, *Jesting Pilate*, by Aldous Huxley, *The Raj Quartet* by Paul Scott, and *The Innocents Abroad* by Mark Twain. Cross-cultural trainers such as Melissa Brayer Hess and Patricia Linderman (authors of *The Expert Expatriate*) have recognized the value of spending time reading *any* of the host national’s literature. They suggest that expatriates read their host country’s popular books, magazines, fables, and even children’s stories (in translation if necessary), due to their ability to reveal numerous cultural attributes (61).

Polly Platt, author of *French or Foe?* and *Savoir Flair!*, conducts cross-cultural seminars in Paris in efforts to help Americans better understand the French. At one of her seminars that I was able to attend, she cleverly used magazine advertisements to illustrate cultural differences among German, American, and French people. She guided her

seminar participants in making culturally revealing observations concerning the presentation and content of each country's respective advertisement. This activity endowed her seminar participants with new eyes to view more fully the cultural implications of common product ads.

Pre-departure cross-cultural training should encompass as much authentic input as possible in efforts to help expatriate spouses refine their observational and analytical skills. The cultural texts that are used to produce a "practice stage" should be valid examples of what the expatriate spouse will encounter upon arrival in her host country. Having a better idea of what to expect in a different culture, by becoming familiar with a number of its cultural texts, will help lessen the negative effects of culture shock. Cross-cultural trainers can encourage prospective expatriate spouses to adopt an appropriate mindset that will help them suspend their ethnocentric judgments and encourage them to open their minds to a new way of thinking. The opportunity to practice their role of anthropologist prior to arrival in their host's country will give expatriate spouses confidence in their ability to continue to learn about a new culture. They will be equipped with an awareness of cultural generalizations about their host country which they can use as working hypotheses once they arrive in their new country.

CONCLUSION

EXPATRIATE ASSISTANCE: A STUDY WORTH PURSUING

LIMITATIONS OF MY SOLUTION

The key to increasing an expatriate spouse's chances of successful adaptation to her host country's culture is to give her adequate, pre-departure training. Of the expatriate spouses who participated in my exploratory research, everyone who offered a recommendation to future expatriate spouses either mentioned the need to acquire more language skills or the importance of gathering more cultural information before embarking on an international assignment. Although my research results contradicted my hypothesis that none of my research subjects would have been very satisfied with their pre-departure assistance, my study did reveal that there is still a definite need for improvement. As mentioned throughout my previous chapters, other researchers in this area are also stressing the need for improved pre-departure assistance.

My proposed solution of teaching expatriate spouses to adopt a new mindset—by assuming the role of anthropologist—presents a viable means to combat the high rate of adaptation failure. By learning how to conduct cultural analysis on her own, an expatriate spouse will be able to progressively come to a better understanding of her host country's culture, which will help her avoid the disheartening frustration of living with continual cultural misunderstandings. This approach to pre-departure training will not be able to provide a complete *cure* for culture shock, but it will offer a *remedy* that can help alleviate some of culture shock's most debilitating symptoms. Pre-departure instruction and exposure to authentic input will give an expatriate spouse an idea of what to expect upon arrival in her host country. Knowing what to expect will mitigate the negative

effects of culture shock, and understanding some of her host's country's cultural generalizations will help an expatriate spouse avoid a number of distressing cultural incidents (both Type I and Type II incidents).

While a certain degree of improvement in cross-cultural understanding can always be made through active study and having an open mind, some expatriate spouses may never feel able to “sufficiently” grasp the complexities of the culture to which they are trying to adapt. For instance, expatriate spouses who have personalities with a low tolerance for ambiguity may possibly feel unsettled throughout their entire expatriate assignment. Storti warns that despite expatriates' best intentions at learning about their host's culture, “not everyone who goes abroad is *capable* of adjusting to the local culture. Moreover, those who may adapt fairly easily to one culture, may not adapt at all to another” [italics added for emphasis] (Crossing Cultures, 1st ed. 43). Cross-cultural trainers need to prepare expatriate spouses for the difficulty of cultural analysis and help them form realistic expectations. Personal trainers should explain that a foreign culture is like “a river composed of many channels, currents, and ripples” (Stewart 173), and consequently it is very difficult to navigate. The difficulty of cross-cultural analysis, however, should not be a deterrent from encouraging expatriate spouses to glean what benefits they can from pre-departure training. Even though they may feel as if their culture and language instruction is not “sinking in” (due to stress, time limitations, or difficulty of the subject material), expatriate spouses will always be better off with this training than without.

Another concern about conducting cultural analysis is the fear of always feeling displaced from one's own feelings and values while trying to adapt to life in a different

culture. Assuming the role of an anthropologist—just like an actor assumes the mindset, thoughts, and emotions of a character in a play—allows for the personal detachment necessary to withhold judgment and actively refuse to take offense during cultural incidents. Yet taking on a temporary role such as this also permits an expatriate to shed this role when she has come to a better understanding of her host’s culture and must then decide what aspects of that culture she wants to integrate into her personal and family culture; the process of which *does* require value judgments. Storti addresses the issue of cultural judgment by advising expatriates to “always try to understand before you judge, but once you *have* understood, you *must*, judge” (94). Carroll also comforts expatriates with her assurance of not being at risk of “losing oneself” while exploring another culture:

Practicing cultural analysis will in no way change the aspects of myself which I consider to be essential but will enrich me with a new way of thinking, will provide me with an additional tool for my apprehension of the mysterious world around me [...] and will afford me interesting discoveries both about myself and the other, both about my culture and that of others. (137)

On the other end of the spectrum, some expatriate spouses do not have a deep cross-cultural understanding of their host culture as one of their goals and therefore do not dwell on the same concerns. While interviewing my research subjects in France, I was surprised to discover that some of the women were content to simply enjoy their short stay in France on a tourist level. They found great satisfaction in visiting the beautiful, historical sites and tasting new cuisine. Although they acknowledged that they

could be having a much more culturally enriching experience, they realized that in their personal situation, the related stress and effort of trying to understand the hidden dimensions of their host's culture was not worth it, especially when they knew that in one year they would be completely starting over again in yet another foreign country. For those whose feelings fall in this category, assuming the role of anthropologist may not be an appealing solution for assisting them in their adaptation. As in all cases, pre-departure training should focus on issues that are of concern to each individual expatriate spouse.

Expatriate spouses can be encouraged in their cultural-analysis endeavors by realizing that cross-cultural experiences provide just as much, if not more, enlightenment regarding their own culture. Edward T. Hall insists that "years of study have convinced me that the ultimate purpose of the study of culture is not so much the understanding of foreign cultures as much as the light that study sheds on our own" (Hidden Difference 59). So even if an expatriate spouse were to feel like she would never be able to understand her host's culture very well, she can still greatly benefit from her intercultural experience. My research participants who readily accepted their expatriate assignment due to its adventuresome appeal and opportunity to gain a broader perspective on life will surely not be disappointed.

FURTHER EXPLORATION

My research has focused on the adaptation of the accompanying expatriate spouse due to its critical role in the success of an expatriate assignment. This does not mean, however, that the adaptation of the expatriate employee and the accompanying children should be downplayed. Their ability to adapt also affects the success or failure of an expatriate assignment. Yet since their circumstances substantially differ from those of the

accompanying spouse (e.g. their adjustment goals, free-time allotment, maturity level, etc.), I believe that my proposed solution of assuming the role of anthropologist would not be as beneficial for them as it would be for the expatriate spouse. Additional research needs to address the adaptation struggles of expatriate employees and accompanying children and explore workable solutions to their problems.

Further research also needs to be directed towards another important factor in the expatriate experience: the difficult adjustment of *repatriation*. Although the scope of my study did not reach into this area, adjustment struggles experienced upon return to one's own country are an important part of an expatriate's full adaptation cycle. Reverse culture shock can be an even more unsettling experience than culture shock in a foreign country because it is hardly *ever* anticipated and can be surprising difficult to handle. For this reason, expatriates need to be well prepared for this transition phase as well. Additional research on this subject can shed light on what repatriation assistance should be given to expatriates, as well as details regarding the content, timing, and intensity of this assistance.

My thesis research, which has been dedicated to the improvement of expatriate-spouse assistance, has come at a time when global relocation trends are moving in the opposite direction. Recent economic strains have led multinational companies to conclude that lengthy expatriate assignments require too much money and entail too many risks and failures to make them profitable. The *Global Relocation Trends 2003/2004 Survey Report* reveals that 64% of their respondents are trying to cost costs by reducing their international assignment expenses (5). Specifically, they are reducing their assignment durations and policy offerings. This year, 70% of expatriate assignments were

scheduled for the duration of one year or less, as compared to 13% in previous years (5). I believe that this trend is, in most cases, counterproductive. As I have illustrated in my previous chapters, adapting to a new culture is very difficult and requires time. The first six to twelve months are overshadowed by intense struggles and adjustments. An expatriate employee will most likely not be very productive during this time. He will be distracted by his own adaptation process as well as by the adaptation struggles of his spouse and children. Multinational companies cannot simply forgo their coordination efforts among their international sites. Sending managers and skilled employees to international locations in order to transfer technology and harmonize procedures is the only way to increase the productivity and value of a multinational company. Trying to implement a quick fix by limiting the duration of an expatriate assignment, even to the point of sending just the employee overseas for a month at a time, is not an effective solution.

Another regrettable response to high expatriate failure rates among Americans is trying to avoid relocating Americans internationally. When possible, some multinational companies choose employees from other countries to fulfill expatriate assignments due to their cross-cultural adaptability and foreign language skills. Americans are notorious for being weak in these areas, which makes them high-risk, expatriate candidates. Nevertheless, denying Americans this opportunity is a great disservice to them and will only perpetuate the problem. By implementing improvements in relocation programs, such as the solution I have proposed, multinational companies can maintain an acceptable return on investment for their relocation programs while affording expatriate employees and their respective families an enriching and life-changing intercultural experience.

Appendix A: Research Forms

Consent to be a Research Subject

Introduction

This research study is being conducted by Angela Williams at Brigham Young University to determine how well the needs of accompanying expatriate spouses are being addressed. You were selected to participate in this study because you are an American who has accompanied your spouse on an expatriate assignment in France.

Participation and Benefits

Participation in this research study is voluntary. You have the right to withdraw at anytime without negative consequences. It is hoped that through your participation researchers will come to a better understanding of expatriate spouses' needs, and that this information will be adopted by international human resource managers to improve pre-departure, expatriate programs and support.

Confidentiality

All information provided will remain confidential and will only be reported as group data with no identifying information. All data, including notes and questionnaires, will be kept in a locked carrel, and only the principal investigator (Angela Williams) will have access to them. After the research is completed, the notes and questionnaires will be destroyed.

Questions about the Research

If you have questions regarding this study, you may contact Angela Williams at 801-372-1287, or at angela_williams@byu.edu.

You may also contact any of her thesis advisors:

- Dr. Brooke Derr: 801-422-4867, or brooke_derr@byu.edu
- Dr. Yvon LeBras: 801-422-2288, or yvon_lebras@byu.edu
- Dr. Michael Bush: 801-422-4515, or michael_bush@byu.edu
- Dr. Scott Sprenger: 801-422-2770, or scott_sprenger@byu.edu

If you have questions about your rights as a research participant you may contact Dr. Shane Schulthies, Institutional Review Board Chair, 801-422-5490, 120B RB, shane_schulthies@byu.edu.

I have read, understood, and received a copy of the above consent and desire of my own free will and volition to participate in this study.

Signature: _____ Date: _____

..... EXPATRIATE SPOUSES IN FRANCE
QUESTIONNAIRE

1. Are you male female ?

2. In what year were you born? 19__

3. How long have you been with your spouse/partner?

4. What were the circumstances behind your current expatriate assignment to France?
 (check all that apply)

- 6 months – 1 year
- 1-3 years
- 4-6 years
- 7-9 years
- 10-15 years
- 16-20 years
- + 20 years

- volunteered for the expatriate assignment
- offered the possibility (no pressure)
- felt forced to accept the assignment
-
- my entire family was happy to relocate
- I was **not** very happy
- my spouse was **not** very happy
- some of my children were **not** very happy
- all of my children were **not** very happy

5. Where did you live prior to your relocation to France?

6. Compared to your previous residence, the population of the city/town where you live in France is...

- West Coast
- Rocky Mountain Region
- Southwest
- Midwest
- New England
- Mid Atlantic States
- Southern States
- Pacific states (Hawaii or Alaska)
- Outside of the United States

- much larger
- somewhat larger
- about the same
- a little smaller
- a lot smaller

Approx. population of previous residence (*if known*):

7. What is the *longest* time that *you and your spouse* have lived in one place?

8. How many times have *you and your spouse* relocated within the United States?

- 6 months – 1 year
- 2-3 years
- 4-5 years
- 6-7 years
- 8-10 years
- + 10 years

- we have never relocated within the US
- 1 relocation
- 2-3 relocations
- 4-5 relocations
- 6-7 relocations
- + 7 relocations

9. Besides your current assignment in France, how many other international relocations have you undertaken *with your spouse*?

- 0
1
2-3
4-6
more than 6

10. How many other countries have you lived in for more than 3 months (*on your own or with your spouse*)?

- I have only lived in the US and in France
1 other country
2 other countries
3 other countries
4 or more other countries

11. How long have you been living in France?

- less than 3 months
3-6 months
6 months to 1 year
1-2 years
2-3 years
3-4 years
more than 4 years

12. What is your expected expatriate assignment duration (total time you will be living in France)?

- 6 months
1 to 1 ½ years
2 years
3 years
4-5 years
6-10 years
undetermined

13. How many children do you have?

- none
1
2
3
4
5 or more

14. What are the ages of your children?

(check all that apply)

- N/A
small children (not yet in school)
“maternelle” age (between 3-6 years)
elementary school age (between 6-12)
secondary school age (between 12-18)
college age (between 18-24)
older than 25

15. Do your children live with you right now?

- No – because we don’t have any
No - none of them
Yes - all of them
Yes - but not all of them

16. If some/all of your children are living with you right now, what is their schooling situation?

- N/A
My child/children are too young to attend school
My child/children attend French public schools
My child/children attend a private or international school
My child/children are home schooled

17. Do you have, or have you had a career?

Yes No

18. If yes, in what occupation?

19. Describe your current employment situation while living in France
(check all that apply)

- I was employed before moving to France and I am employed now
- I was **not** employed before moving to France and I am **not** employed now
- I was employed before moving to France and I am **not** employed now
- I was **not** employed before moving to France and I am employed now
- I am doing volunteer/ non-paid work
- I am currently pursuing additional education

20. What amount of time did you have to prepare for your relocation to France (from the decision moment to your official arrival in France)?

- less than 1 month
- 1-2 months
- 3-4 months
- 5-6 months
- 7-8 months
- 9 months to 1 year
- more than 1 year

21. What pre-departure assistance did your spouse's company provide?
(check all that apply)

- they did not provide any assistance
- basic relocation assistance (housing, banking, etc.)
- language / culture training for *my spouse*
- language / culture training for *myself*
- language / culture training for *my children*
- career counseling and assistance for *myself*
- manuals, books, and/or videos
- professional consultant

22. How would you rate the level of pre-departure assistance provided by your spouse's company?

- excellent
- very good
- satisfactory
- poor
- no assistance was provided

23. How would you rate the level of assistance provided by your spouse's company once you arrived in France?

- excellent
- very good
- satisfactory
- poor
- no assistance was provided

24. Which of the following activities have helped you to adjust to your stay in France?
(check all that apply)

- spending time with my spouse/partner and/or children
- socializing with other expatriates
- socializing with French community members
- getting involved with clubs and associations
- keeping in touch with family back home
- using the internet or e-mail
- sightseeing
- learning to speak French
- learning about French culture / history
- doing volunteer / non-paid work
- religious worship
- stress-relieving activities such as yoga, walking, journal writing, etc
- other (**please explain in the box below**)

25. Which of the following sources have helped you to *prepare for* and *adjust to* your stay in France? (check all that apply)

	Any examples or descriptions
Human Resource contact / mentor (pre-departure)	<input type="checkbox"/> _____
Human Resource contact / mentor (in France)	<input type="checkbox"/> _____
relocation agent (housing, banking, etc.)	<input type="checkbox"/> _____
internet sites	<input type="checkbox"/> _____
brochures	<input type="checkbox"/> _____
tourist books	<input type="checkbox"/> _____
culture books	<input type="checkbox"/> _____
newspapers, journals, magazines	<input type="checkbox"/> _____
French novels, stories, comic strips...	<input type="checkbox"/> _____
French language classes, videos, CDs, books	<input type="checkbox"/> _____
French movies / TV watching	<input type="checkbox"/> _____
support groups (clubs, societies, etc.)	<input type="checkbox"/> _____

26. What kind of reading do you enjoy?

- magazines
- newspapers
- novels
- great works (or classical literature)
- autobiographies / historical works
- other (please explain in the box below)

27. How many books do you usually read per month? _____

28. What hobbies did you enjoy doing in the U.S. (or previous residence)?

- Have you been able to continue doing these hobbies in France? (please write “yes” or “no” next to each hobby)
- Have you found some good replacement activities? no yes

If “yes”, please list new activities: _____

29. What hobbies did *your spouse* enjoy doing in the U.S. (or previous residence)?

- Has your spouse been able to continue doing these hobbies in France? (please write “yes” or “no” next to each hobby)
- Has your spouse found some good replacement activities? no yes

If “yes”, please list new activities: _____

30. What hobbies did *your children* enjoy doing in the U.S. (or previous residence)?
N/A

- Have you been able to continue doing these hobbies in France? (please write “yes” or “no” next to each hobby)
- Have you found some good replacement activities? no yes
If “yes”, please list new activities: _____

31. How would you summarize your French expatriate experience so far?
(check all that apply)

- it is the best thing that has happened to me
- it has been an overall positive experience
- it has changed the way I view the world – I’ve become more open-minded
- it has strengthened my marriage and/or personal relationships
- I like some aspects of expatriate life and dislike others
- I have struggled a lot more than I anticipated
- overall I have not enjoyed the experience so far
- it has caused a lot of tension and strife within my family
- I really dislike the expatriate life and regret coming

32. How would you describe the overall adjustment of your spouse?

- my spouse has had an *easy adjustment* and really likes this expatriate experience
- my spouse has *struggled* but is now enjoying this expatriate experience
- my spouse is *still having a difficult time* adjusting to life in France
- my spouse is *not adapting very well* and wants to leave France

33. How would you describe the overall adjustment of your child/children? (check all that apply)

- N/A
- all** of my children have had an *easy adjustment* and really like this expatriate experience
- all** of my children have *struggled* but are now enjoying this expatriate experience
- all** of my children are *still having a difficult time* adjusting to life in France
- all** of my children are *not adapting very well* and want to leave France
- some** of my children have had an *easy adjustment* and really like this expatriate experience
- some** of my children have *struggled* but are now enjoying this expatriate experience
- some** of my children are *still having a difficult time* adjusting to life in France
- some** of my children are *not adapting very well* and want to leave France

..... OPEN-ENDED QUESTIONS.....
(PLEASE FEEL FREE TO WRITE AS LITTLE OR AS MUCH AS YOU WOULD LIKE)

A) What were the factors that influenced your decision to come to France?

What was appealing?	What were the concerns / drawbacks?

B) As a result of this expatriate assignment, what do you see as your biggest gains and losses? (*effects on your family, personal identity, comforts, experiences, etc.*)

Gains	Losses

C) Given the opportunity to redo your pre-departure preparation, your relocation, and your first few months living in France, what would you do differently? (*or what recommendations would you give others in this situation?*)
 --If necessary, please use the back of this paper to continue writing your comments.--

Appendix B: Summary of Cultural Assumptions and Values

Source: Stewart, Edward C., Jack Danielian, and Robert J. Foster. "Cultural Assumptions and Values." *Basic Concepts of Intercultural Communication: Selected Readings*. Ed. Milton J. Bennett. Yarmouth, ME: Intercultural Press, 1998. pp 167-171

American	Contrast-American
1. Definition of Activity	
a. How do people approach activity? (1) concern with "doing," progress, change external achievement (2) optimistic striving	(1) "being" spontaneous expression (2) fatalistic
b. What is the desirable pace of life? (1) fast, busy (2) driving	(1) steady, rhythmic (2) noncompulsive
c. How important are goals in planning? (1) stress means, procedures, techniques	(1) stress final goals
d. What are important goals in life? (1) material (2) comfort and absence (3) activity	(1) spiritual (2) fullness of pleasure and pain (3) experience
e. Where does responsibility for decisions lie? (1) responsibility lies with each individual	(1) Function of a group or resides in a role (dual contrast)
f. At what level do people live? (1) operational, goals evaluated in terms of consequence	(1) experiential truth
g. How do people assign value? (1) utility (does it work?)	(1) essence (ideal)
h. Who should make decisions? (1) the people affected	(1) those with proper authority
i. How do people solve problems (1) planning outcomes (2) anticipating consequences	(1) coping with outcomes (2) classifying the situation
j. How do people learn? (1) actively (student-centered learning)	(1) passively (serial rote learning)

American	Contrast-American
2. Definition of Social Relations	
a. How are roles defined? (1) attained (2) loosely (3) generally	(1) ascribed (2) tightly (3) specifically
b. How do people relate to others whose status is	

<p>different?</p> <p>(1) stress equality, minimize differences (2) stress informality and spontaneity</p>	<p>(1) stress hierarchical ranks, stress differences (2) stress formality, behavior more easily anticipated</p>
<p>c. How are sex roles defined?</p> <p>(1) similar, overlapping (2) sex equality (3) friends of both sexes (4) less legitimized</p>	<p>(1) distinct (2) male superiority (3) friends of same sex only (4) legitimized</p>
<p>d. What are members' rights and duties in a group?</p> <p>(1) assume limited responsibility (2) join group to seek own goals (3) active members can influence group</p>	<p>(1) assume unlimited responsibility (2) accept constraint by group (3) leader runs group, members do not</p>
<p>e. How do people judge and relate to others?</p> <p>(1) specific abilities or interests (2) task-centered (3) limited involvement</p>	<p>(1) overall individuality of person and his/her status (2) person-centered (3) total involvement</p>
<p>f. What is the meaning of friendship?</p> <p>(1) social friendship (short-term commitment, friends shared)</p>	<p>(1) intense friendship (long-term commitment, friends are exclusive)</p>
<p>g. How do people regard friendly aggression in social interaction?</p> <p>(1) acceptable, interesting, fun</p>	<p>(1) not acceptable, embarrassing</p>

American	Contrast-American
3. Motivation	
<p>a. What is the motivating force?</p> <p>(1) achievement</p>	<p>(1) ascription</p>
<p>b. How is competition among humans evaluated?</p> <p>(1) constructive, healthy</p>	<p>(1) destructive, antisocial</p>

American	Contrast-American
4. Perception of the World (Worldview)	
<p>a. What is the (natural) world like?</p> <p>(1) physical (2) mechanical (3) subject to control by machines</p>	<p>(1) spiritual (2) organic (3) not subject to control by machines</p>
<p>b. How does the world operate?</p> <p>(1) rational, learnable, controllable manner (2) chance and probability</p>	<p>(1) mystically ordered, spiritually conceived</p>

	manner (fate, divination)
c. Where do humans stand in nature? (1) apart from nature or any hierarchy (2) things are impermanent, not fixed, changeable	(1) part of nature or of some hierarchy (dual contrast) (2) things are permanent, fixed, not changeable
d. What are the relationships between people and nature? (1) good is unlimited (2) humanity should modify nature for its ends (3) good health and material comforts expected and desired	(1) good is limited (2) humanity should accept the natural order (3) some disease and material deprivation are natural, expected
e. What is truth? Goodness? (1) tentative (2) relative to circumstances (3) experience analyzed in separate components, dichotomies	(1) definite (2) absolute (3) experience apprehended as a whole
f. How is time defined? valued? (1) future (anticipation) (2) precise units (3) limited resource (4) lineal	(1) past (remembrance) or present experience (dual contrast) (2) undifferentiated (3) limitless resource (4) circular, undifferentiated
g. What is the nature of property? (1) private ownership important as extension of self	(1) use for “natural” purpose regardless of ownership

American	Contrast-American
5. Perception of the Self and the Individual a. How is the self defined? (1) diffuse, changing (2) flexible behavior	(1) fixed, clearly defined (2) person located in a social system
b. Where does a person’s identity seem to be? (1) within the self (achievement)	(1) outside the self in roles, groups, family, clan, caste, society
c. Nature of the individual (1) characteristics separable	(1) perceived as totality
d. On whom should one rely? (1) self (2) impersonal organizations abstract principles	(1) superiors, patron, others (2) people
e. What are the qualities of a person who is valued	

and respected? (1) youthful (vigorous)	(1) aged (wise, experienced)
f. What is the basis of social control? (1) persuasion, appeal to the individual (2) guilt	(1) formal, authoritative (2) guilt

American	Contrast-American
6. Generalized Forms a. lineal (time) b. efficient and material cause-and-effect thinking (space) c. material substantive (essence and energy) d. operationalism (implied observer) e. induction f. judgment by comparison	a. nonlinear b. formal causes correlative thinking c. spirit, energy d. direct apprehension or formalism (dual contrast) e. deduction or transduction (dual contrast) f. judgment against an absolute standard

Appendix C: Recommended Readings

GENERAL EXPATRIATE PREPARATION

The Adventure of Working Abroad (1995)
By Joyce S. Osland

The Art of Coming Home (2001)
by Craig Storti

The Art of Crossing Cultures (2nd ed, 2001)
by Craig Storti

The Expert Expatriate: Your Guide to Successful Relocation Abroad (2002)
by Melissa Brayer Hess and Patricia Linderman

Living Overseas (1984)
by Ted Ward

Overseas Americans: The Essential Guide to Living and Working Abroad (2001)
by William Beaver

Survival Kit for Overseas Living (4th ed, 2001)
by L. Robert Kohls

Special Issues for Accompanying Spouses
Culture Shock!: A Wife's Guide (2002)
by Robin Pascoe

Homeward Bound: A Spouse's Guide to Repatriation (2000)
by Robin Pascoe

Many Women Many Voices: A Study of Accompanying Spouses Around the World (2002)
by Anne P. Copeland

Moving Families: Expatriation, Stress and Coping (2001)
by Mary Haour-Knipe

A Portable Identity: A Woman's Guide to Maintaining a Sense of Self While Moving Overseas (2003) by Debra R. Bryson and Charise M. Hoge

PREPARING FOR LIFE IN FRANCE
[see readings list on pages 64-65]

INTERCULTURAL LEARNING

American Cultural Patterns: A Cross-Cultural Perspective (2nd ed, 1991)
by Edward C. Stewart and Milton J. Bennett

Beyond Culture (1976)
by Edward T. Hall

Cultures and Organizations: Software of the Mind (1997)
by Geert Hofstede

Culture Shock: Psychological Reactions to Unfamiliar Environments (1986)
by Adrian Furnham and Stephen Bochner

The Silent Language (1981)
by Edward T. Hall

Understanding Cultural Differences: Germans, French, and Americans (1990)
by Edward T. Hall and Mildred Reed Hall

INTERCULTURAL TRAINING (RESOURCES FOR CROSS-CULTURAL TRAINERS)

Crossing Cultures: Insights From Master Teachers (2003)
edited by Nakiye Avdan Boyacigiller, Richard Alan Goodman, and Margaret E. Phillips

Crossing Cultures Through Film (1993)
by Ellen Summerfield

Developing Intercultural Awareness (2nd ed, 1994)
by L. Robert Kohls and John M. Knight

Experiential Activities for Intercultural Learning (1996)
edited by H. Ned Seelye

Handbook of Intercultural Training (3rd ed, 2004)
edited by Dan Landis, Janet M. Bennett and Milton J. Bennett

Teaching French Culture: Theory and Practice (1994)
by Ross Steele and Andrew Suozzo

Training for the Cross-Cultural Mind (1981)
by Pierre Casse

EXPATRIATE ASSIGNMENTS (A MANAGERIAL PERSPECTIVE)

Global Assignments: Successfully Expatriating and Repatriating International Managers (1992)
by Stewart J. Stewart Black, Hal B. Gregersen, and Mark E. Mendenhall

Global Management (1995)

by Mark Mendenhall, Betty Jane Punnett, and David Ricks

Going International: How to Make Friends and Deal Effectively in an International Marketplace (1985)

by Lennie Copeland and Lewis Griggs

International Business: Managerial Perspective Forecast 2003 (3rd ed, 2002)

by Ricky W. Griffin and Michael W. Pusey

Managing Internationally: A Personal Journey (1999)

by Gary Oddou and C. Brooklyn Derr

Riding the Waves of Culture: Understanding Diversity in Global Business (1994)

by Fons Trompenaars

Appendix D: Internet Resources

WEBSITES FOR EXPATRIATES

www.anamericanabroad.com: An educational resource for an international community. They provide products, services, and information to facilitate expatriates' lives.

www.awgparis.org: The official site for the "American Women's Group" in Paris.

www.consultus.net: The website for a company who provides expatriate training for people traveling to Europe, Asia, and the USA. It also has order forms for the book, *When abroad - do as the local children do: Ori's guide for young expats*.

www.expatechange.com: An extensive information source for expatriates living all over the world.

www.expatexpert.com: A website created by Robin Pascoe, a relocation specialist who focuses on the joys and challenges of families involved in global relocation. She offers many other helpful web links and resources.

www.expatica.com: An information source for expatriates living in the Netherlands (Holland), Germany, France, Belgium or Spain.

www.familylifeabroad.com: A site full of helpful tips for families moving abroad.

www.going-there.com: An international relocation service (membership required) which offers 24/7 online support plus personal guides in major European cities.

www.newcomersclub.com: A worldwide directory for clubs and organizations who assist in welcoming newcomers.

www.talesmag.com: The site for *Tales from a Small Planet* which provides stories, articles, and resources for travelers and expatriates.

www.transitionsabroad.com: A site with extensive resources for both living and traveling abroad. It provides an excellent list of helpful websites for expatriates (click on "expatriate sites" under "Living Abroad" located in the left margin).

www.travelwithyourkids.com: A site providing tips on how to travel internationally with children.

www.wice-paris.org: A nonprofit, Anglophone volunteer-based association which provides cultural and educational programs and services to the international community in Paris.

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