Cross-cultural research diary: a personal odyssey

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Abstract: This paper sheds light on how the environment I grew up in engendered my interest in cross-cultural research. Each and every project that I have undertaken in my career – from expatriates to ex-host country nationals, cross- and intra-national diversity and bicultural identity – represented a personal voyage of discovery for me and helped me understand some of the experiences that I have encountered and/or observed in my life. My research questions and hypotheses were guided by my first-hand experience of whether they made sense and what mattered most from the perspective of someone who has encountered much cross-national diversity.

Keywords: cross-cultural research; expatriates; international assignments; ex-host country nationals; EHCNs; cross-national diversity; intra-national diversity; brain circulation; bicultural identity.

Reference to this paper should be made as follows: Tung, R.L. (2009) 'Cross-cultural research diary: a personal odyssey', *European J. Cross-Cultural Competence and Management*, Vol. 1, No. 1, pp.9–13.

Biographical notes: Rosalie L. Tung (PhD, University of British Columbia) is the Ming and Stella Wong Professor at Simon Fraser University (Canada). She was formerly a Wisconsin Distinguished Professor, Business Administration, with the University of Wisconsin System. She is elected fellow of the Royal Society of Canada, the Academy of Management, the Academy of International Business and the International Academy for Intercultural Research. She served as the 2003–2004 President of the Academy of Management, the leading association of 19,000 professors of management from around the world. She is the Author or Editor of 11 books and many articles. She is the Area Editor of *Comparative Management/IHRM*, the *Journal of International Business Studies* and a past Editor of the *Journal of World Business*.

1 Introduction

As one of the earlier entrants into the field of cross-cultural or comparative management research, I have been asked to share with you, the readers, my personal odyssey or my life-long quest for understanding interactions among peoples across international boundaries. I will briefly outline the motivations for my research topics over the decades – from expatriates to ex-host country nationals (EHCNs), comparative management with East Asia, 'trade diasporas' (Cohen, 1996) and brain circulation (Saxenian, 2000; Tung, 2007).

While I do not want to delve into my personal background, I think it is important to provide a brief glimpse of it so that you can understand the environment in which I grew up in. To a large extent, the circumstances surrounding the formative years of our lives can often explain who we are and what we are. I was born in Shanghai, one of the most cosmopolitan cities in the world then known as the 'Pearl of the Orient', a title which it has reclaimed in the recent past. My parents brought me to Hong Kong as an infant. Hong Kong was then a British colony where Chinese and English were the two official languages; so I grew up learning both languages simultaneously. While both of my parents are Chinese, my father is very Western in of his upbringing and education; whereas my mother, a deeply devout Catholic, was a very traditional Chinese woman who imbued upon my sisters and I the virtues of adhering to one's cultural roots and treasuring Chinese values and principles. I was educated at an all girls' Catholic school run by Italian nuns where all the subjects were taught in English except for classes in Chinese history and Chinese literature. While the majority of my classmates were Chinese, there were also the children of British expatriates and merchants/traders from India, Portugal and Persia. Thus, from a very early age, I was exposed to a bi- or multi-cultural environment where I could observe first-hand that, on one hand, cultural differences could lead to segregation and mistrust in society – the expatriates in Hong Kong lived in their enclaves and hence were socially and spatially separated from mainstream society; while, on the other hand, strong friendships and bonds could exist among students from different racial/ethnic backgrounds and between the Caucasian religious (i.e., priests and nuns) and their predominantly Chinese community.

This early exposure to cross-cultural interaction facilitated the ease with which I was able to adapt subsequently to the Canadian and US lifestyles. Aside from experiencing jetlag caused by disruption to the circadian rhythm when I left Hong Kong to study in Canada, I did not experience – not even for a moment – any of the symptoms and consequences of culture shock that is described in the cross-cultural literature. When I was first introduced to cross-cultural literature in my MBA program, you can imagine my delight in reading about things that I have experienced since early childhood and to discover that there are actual theories, concepts and constructs (however under-developed they may be at that time) that describe some of these phenomena.

When I informed my PhD advisor, the late Prof. Vance F. Mitchell, of my desire to pursue my doctoral dissertation in the field of cross-cultural research, in his typical father-like demeanour, he warned me against the perils of so doing. Remember, this was in the 1970s when cross-cultural research did not enjoy the popularity among researchers/scholars as it does today. In fact, engaging in cross-cultural research could be downright detrimental to one's academic career! As one of the sweetest and best advisors that any doctoral candidate could have, Vance would always conclude our conversations with some sagely and upbeat advice – "Rosalie, after you complete your dissertation, you have an entire lifetime to pursue what you are interested in". I took this advice literally and as they say, the rest is history.

There was no looking back once I embarked on cross-cultural research as any research project represented a personal voyage of discovery for me. Each and every new research project bore my own personal imprimatur as my research questions and hypotheses were guided by my first-hand experience of whether they made sense and what mattered most from the perspective of someone who has encountered much cross-national diversity. This adds realism to my research. Any new research finding helped me to unravel a bit more of the puzzle surrounding some of the experiences that I

have encountered and/or observed in my life. Every day since I began my academic career, I have counted my blessings of entering into the field of cross-cultural research at an opportune time – that is, as the world globalises and peoples from different countries are brought closer together than ever before in the history of humankind, for the first time, many people were just beginning to experience the same phenomena that I have grown up with and, more importantly, were trying to make sense of these developments.

2 From expatriates to EHCNs and beyond

From the above, it is easy to imagine my joy at seizing upon the opportunity to understand the reasons for the success and failure of expatriates. I created and filled a niche because an extant search of the available literature then revealed a virtual absence of research on the subject, aside from some anecdotal accounts by expatriates or sojourners abroad. This early research resulted in the publication of my seminal work on a contingency paradigm of selection and training of expatriates for international assignments (Tung, 1981). Based on a meta-analysis of the expatriation literature, Harzing (1995) has attributed the burgeoning literature on that subject to my pioneering 1981 piece. My research on expatriation has impact because it provided useful insights to organisations and individuals as they contend with the challenges posed by these cross-cultural interactions.

My early research on expatriates focused at the firm level, namely the policies and practices adopted by multinationals from the USA, west Europe and Japan (Tung, 1984; Tung, 1986). Since I do not believe in conducting studies that can only make a marginal increment to knowledge, after researching the policies and practices of multinationals from different nations, I moved on to research the interface between expatriates and their host community, resulting in my large-scale study of the acculturation of Americans abroad and inpatriates into the USA (Tung, 1998).

Concurrent with this transition to examining the acculturation of expatriates, in light of the growing diversity in the North American workforce, as a Chinese and as a woman – hence a double minority – I became acutely aware of the parallels that existed between cross-national diversity (as in the case of expatriates) and intra-national diversity (as in the case of race relations between blacks and whites in the USA and gender differences in management/leadership styles). Despite these parallels, the two streams developed and progressed fairly interdependently of each other, with researchers on cross-national diversity seldom reading literature in the intra-national diversity field and vice-versa. I felt that this was counter-productive and in Tung (1993), while recognising the differences, I posited the similarities in dynamics and processes because cross-national vis-à-vis intra-national diversity and hence the need for cross-fertilisation between the two. In Tung (2008a), I argued for the need to understand intra-national differences in the context of conducting cross-cultural research, including challenging the traditional practice of using the nation-state as a surrogate for cultural groups.

Coincidental with these developments, I became increasingly aware of the growing incidence of successful Chinese and Indians professionals in North America who were returning to their respective countries of origin (COO), to take advantage of the economic opportunities in these markets. The emerging phenomenon of 'brain circulation' (Saxenian, 2000) has led me to coin the term, EHCNs to refer to people described in the preceding statement (Tung, 2006). The phenomenon of EHCNs can also be observed in

the emerging markets in Central and Eastern Europe (Tung and Lazarova, 2006). In this case, my desire to understand EHCNs was again motivated by questions that I find personally useful and meaningful. To use the example of the Chinese, there are three categories of EHCNs – they range from Chinese who were born and raised overseas, like my daughter, Michele, who is now working in Shanghai; to Chinese, like myself, who were born in China, but have lived most of their lives outside of China; to Chinese who were born and raised in China and have spent some time studying and/or working outside of China. Meaningful research questions included the challenges that these different categories of EHCNs encounter; their reasons for returning to China and their interactions with host country nationals.

My current research on human capital flows and EHCNs has tremendous implications for future directions of cross-cultural research. In my opinion, the phenomenon of brain circulation 'has challenged us to fundamentally rethink the parameters and the way in which we have conducted cross-cultural research in the past' [Tung, (2008b), p.471]. In Tung (2008b), I discussed these research implications, the most salient ones of which will be re-iterated here. First, this development challenges the widely-held assumption of relative cultural stability over time as human capital flows will undoubtedly accelerate the rate and magnitude of cultural change within a given nation-state. Second, most existing literature on expatriates focus on traditional expatriates, i.e., nationals sent from multinational headquarters. The increasing deployment of EHCNs, including those who undertake self-initiated assignments, raises 'the fundamental question of who are expatriates and who are host country nationals' [Tung, (2008b), p.471]. This does not suggest that EHCNs do not encounter problems in living and working in the target country; rather, the challenges they face are very different from those experienced by traditional expatriates. Furthermore, the growing incidence of human capital flows requires a fundamental rethinking of issues that are salient in the expatriation literature, namely, acculturation, selection, training, development, performance appraisal and compensation. Third, many EHCNs are confronted with the question of bicultural identity. Studies of EHCNs can contribute to the literature on this subject (see, for example, Benet-Martinez and Harritatos, 2005). Fourth, EHCNs and other immigrants with connections to their COO (also known as 'immigrant effect', see Tung and Chung, 2007, for example) can be important sources of social capital to facilitate trade and investment in these target markets.

The foregoing represents a highly condensed diary of my research thus far and an agenda for future research. Many people have asked me how I have been able to sustain an active research agenda that spanned four decades over two millennia and some have probed me about my almost uncanny ability to identify research topics that have subsequently become very popular. The short answer to these dual queries is passion. Because I am truly passionate about my research topics, work becomes play! This passion has enabled me to work long hours, year after year and weather frustrations and setbacks which are part and parcel of our profession. In fact, I have publicly stated on many occasions that even if my research on topics that I am truly passionate about were rejected for publication, I am still pleased for having undertaken them because I have learned something useful. Each and every piece of research is a personal voyage of discovery for me; thus, this in itself represents adequate reward for all my hard work and effort. I hope that my reflections here will inspire others who engage in cross-cultural research to undertake similar voyages of discoveries about themselves. Collectively,

these personal journeys can enlighten our collective understanding of intercultural interactions.

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