Metaphorical “types” and human resource management: self-selecting expatriates

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Keywords

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Abstract

Whilst globalisation has led to increasing international mobility, the contemporary expatriate management literature has focused on managers and corporate executives who are sent on an overseas appointment by their employers. By comparison, self-selecting expatriates remain an under-researched group. Specifically, at a time when internationalisation is a major trend in higher education very little is known about expatriate academics as an example of self-selecting expatriates. Drawing on a qualitative study of British academics, this article suggests that metaphor may be a useful tool for developing our understanding of self-selecting expatriates. It then discusses the four metaphors, which have emerged from the study. Finally it shows how those metaphors can be used to facilitate better management practices not only for the growing number of expatriate academics but also for self-selecting expatriates more generally.

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The use of metaphor is becoming increasingly common in management literature and research (McCourt, 1997; Morgan, 1997; Oswick and Grant, 1996). Further, its use in the organisational development literature has been particularly well recognised through the work of Gareth Morgan (1980, 1983, 1997). However, whilst it enjoys considerable popularity, metaphor has also been criticised, amongst other things, for providing only partial insight and fostering misrepresentation and misunderstanding (Palmer and Dunford, 1996; Linstead, 1993; Tsoukas, 1991).

Indeed even Morgan, a longstanding supporter, concedes that whilst very persuasive, metaphor can also be “blinding and block our ability to gain an overall view” (Morgan, 1997, p. 347). Put another way, whilst metaphors are instructive they “conceal as well as reveal” (Manning, 1992, p. 45).

Drawing on an empirical study of British expatriate academics, this paper contributes to the debate about using metaphor as part of HRM practices. Specifically, the paper argues that metaphor is well placed to encourage more effective recruitment, selection, training and management of self-selecting expatriate professionals. This will add to Osland’s (1990, 1995) pioneering study of the expatriate assignment as a hero’s adventure, by identifying four new metaphors for the expatriate experience: the expatriate as explorer, outsider, tightrope walker and refugee.

It will also consider the implications of using these metaphors for managing self-selecting expatriates more generally and expatriate academics in particular. We can appreciate the usefulness of focusing on academics, as an example of self-selecting expatriates more generally, by reflecting on Mendenhall’s (1996) work on foreign teaching assistants. He suggests that there are significant parallels between foreign teaching assistants and expatriate managers. The same can be said of expatriate academics. Like expatriate managers, academics must: communicate and work closely with host nationals, have their performance evaluated, be remunerated for their efforts, hold positions of authority over host nationals, hold host nationals accountable for their work performance and learn to operate effectively in both a new work and non-work environment. In this respect expatriate academics are a useful example of self-
selecting expatriates in the context of
increasing international mobility as a more
general trend. Specifically, they offer useful
insights into the experience of expatriation
because of their synergies with other self-
selecting expatriate professionals such as
managers, engineers, doctors and other
professionals.

However, to begin it is useful to put the
paper into context by reflecting briefly on the
trend towards increasing expatriation as
evidenced in the contemporary expatriate
management literature. Bearing in mind the
empirical study upon which this paper is
based, a discussion of the trend towards
increasing expatriation amongst academics
will follow.

Contemporary expatriate management
literature and the trend towards
increasing expatriation

The contemporary expatriate management
literature leaves us with little doubt that
expansion of the global economy has led to
increasing levels of expatriation (Selmer,
1999; Brewster and Harris, 1999). This
means that at an individual level, a growing
number of managers and corporate executives
will experience expatriation at some point in
their working lives (Stroh et al., 1998; Forster,
1997). Nor is this a passing trend. With
forecasts of increasing international mobility
over the next decade and well into the third
millennium, expatriation will be an
increasingly common work experience
(Forster, 1997). However, whilst increasing
expatriation and the management of
expatriates have become an extensive area of
interest (Forster, 1997), much of the
literature has focused on “the expatriate
assignment of corporate executives” (Inkson
et al., 1997, p. 353). Self-selecting expatriates,
i.e. those who have independently sought an
overseas position, have been less well
researched. Further, with only a few
exceptions (e.g. Osland, 1990, 1995;
Peltonen, 1998) there is a dearth of
qualitative studies focusing on the individual’s
experience of expatriation (Mendenhall et al.,
1993). Therefore, in addition to focusing on
an example of self-selecting expatriates, the
paper also contributes to the current body of
expatriate management literature by drawing
on a qualitative study.

The trend towards increasing
expatriation amongst academics

The link between globalisation and increasing
levels of expatriation amongst managers and
corporate executives has been widely
acknowledged (e.g. Black and Gregeresen,
1999; Black et al., 1999; Brewster and Harris
1999; Selmer, 1999; Ayean, 1997; Forster,
1997; Black et al., 1992). It is based on the
assumption that as globalisation increases, a
growing number of business organisations
need to operate internationally (Daniels and
Insch, 1998; Tung, 1998; Bonache and
Fernandez, 1997; Harzing, 1997; Rodrigues,
1997; Napier and Peterson, 1996; Forster,
1992). However, in addition to impacting on
business organisations, globalisation has
created a context where “as the world has
become increasingly interdependent and
national academic boundaries have been
blurred, science and scholarship are
becoming increasingly international”
(Altbach and Lewis, 1996, p. 36). Further, as
educational institutions seek to develop
competitive advantage through strategic
international alliances, collaboration between
institutions in different countries is also
increasing both in research and teaching
(Scott, 1994). Indeed, a review of university
magazines and journals of education suggests
that internationalisation is the main goal of
higher education (Laureys, 1992).

Despite recent trends, however, budget
cutbacks, job insecurity and increased
competition for jobs mean that for many
academics international mobility is not an
option (Scott, 1994). Further, the complexity
of work responsibilities and the growth in
administrative duties (Currie and Welch,
1996) limits the ability to secure international
relocation through strategic networking
(Welch, 1997). Also, on a personal level,
uprooting one’s family and moving overseas
may not be an attractive proposition so many
choose to remain in their home country.
However, this being said, with the expansion
of international connections between
universities and improved travel and
communication, whilst the majority may stay
at home, more and more academics are
experiencing expatriation as part of their
academic careers (Welch, 1997; Altbach,
1996; Schuster, 1994). That an increasing
number of universities are actively pursuing
strategic international alliances and more
faculty are travelling abroad substantiates this further (Schermherhorn, 1999; Altbach, 1996). Therefore, contemporary higher education is best understood as an international enterprise where, in addition to a well-documented increase in travel by the student body, international mobility, including expatriation, is increasingly common amongst academics (Schermherhorn, 1999; Welch, 1997; Altbach and Lewis, 1996). This has led to more universities having an international faculty comprising different cultures and values (Altbach, 1996). In this context the issue of managing expatriate academics becomes more complex and needs to be more strategic. Therefore, as far as HRM issues are concerned, expatriate academics present a growing challenge for institutions of higher education.

Methodology

Defining an expatriate academic

The concept of expatriation and what constitutes an expatriate is a highly complex issue (Harzing, 1995). Therefore we approach the problem of definition with some caution. The British expatriate academics at the centre of this paper are understood as “professors and non-professorial staff, the latter only as far as [they are] part of the research and teaching profession” (Karpen, 1993, p. 42). They have been employed in institutions of higher education outside Britain for ten years or less and intend to live in the host country at least until the end of their working contract. Whilst it was hoped that imposing a maximum and minimum period of residence would help to distinguish between expatriates, migrants and sojourners, the authors concede that some of the academics involved in this study could stay on indefinitely and therefore become migrants.

The sample comprised 30 British expatriate academics working in universities in New Zealand, Singapore, Turkey and The United Arab Emirates. All participants had obtained their overseas position independently and had been living in the host country for less than ten years but more than one. At the time of the study none intended to stay on a permanent basis. Initially, an institution-wide e-mail was sent to all academic staff in a sample of higher educational institutions in each of the four countries. This was facilitated through a point of contact in each of the targeted institutions. An interview was arranged with those who accepted the invitation to participate and who fitted the definition described above. From the total number of volunteers, purposeful sampling (Seidman, 1998; Maxwell, 1996) was used to select 30 according to whether they were married, single, male or female. A full table detailing the participants is given in the Appendix.

The research method was focused, in-depth interviews or, as Denzin (1989, p. 102) so aptly calls it, “the sociologist’s favourite digging tool”. In keeping with Douglas’s (1985) notion of the interview as a process whereby life experiences can be openly shared, it facilitated a more in-depth understanding of interviewees’ experiences of expatriation. It also fostered a situation where issues could be raised and discussed which were pertinent to both the interviewer and interviewee (Gubrium and Holstein, 1997).

All interviews were tape-recorded and lasted between one and three hours. No one refused to be recorded despite the fact that they often discussed issues which were either very personal or which might have proved detrimental to their professional status, for example, openly criticising their host institution/country or senior management.

This is important, bearing in mind that for many one of the negative characteristics of being an expatriate academic is the precariousness of their situation. All interviews were transcribed verbatim and then analysed using the software programme QSR NUD*IST Vivo. As interviews were analysed, identified metaphors might either be further refined or developed or a new metaphor would emerge. Whilst it was possible to identify one or two major metaphors in each of the interviews, some aspects of an interviewee’s experiences also indicated synergies with other metaphors. This paper will focus on four major metaphors emerging from the interviews. Each of these metaphors is discussed below.

Discussion

The expatriate academic as explorer

This was the most common metaphor to emerge. For many of the participants in this
study, expatriation was driven not by a desire to enhance their career opportunities but to explore more of the world. Many spoke of wanting to visit countries and experience different cultures at a much deeper level than vacations would allow. In this respect the expatriate academic as explorer has important synergies with Osland’s (1990, 1995) notion of the expatriate assignment as a hero’s adventure.

It suggests that expatriation may be more about personal fulfilment and ambition than professional opportunities. Certainly, for many, it was an opportunity to add another dimension to their lives by experiencing other cultures and countries for an extended period of time. As shown by Jack and Sheena, below, there was a perception of personal challenge and deliberately seeking out positions in countries where the host culture would be very different to what they had experienced in Britain. In this respect expatriation was a means of cross-cultural learning and exploration.

Moreover, it was also a means of learning and exploration in terms of what it was like to be without the familiar structures of family and friends in Britain:

I enjoyed living in foreign countries, I didn’t want to just go and visit there, I would plan to go and live somewhere and sort of learn the language and experience the place and the culture more deeply . . . I like going to new places, I like to see things that I haven’t seen before and, er, I like living in cultures that I haven’t seen before. I like finding out what it’s like to be there on my own (Jack, United Arab Emirates).

My aim is to see more of the world, yeah certainly more than CV enhancing activity. Not just to see the places but to see how people live and meet people . . . I suppose that’s what’s interesting but it’s not just kind of going and saying you are wandering around for me but I just like living in places and just seeing how they work. Like when I came to Singapore not particularly for the job . . . but because I was interested to live in Singapore to see how it works because . . . I mean when you get to understand it it’s quite different, but I suppose that’s the sociologist in me coming out!” (Sheena, Singapore).

The metaphor of expatriate academic as explorer appropriately indicates how taking an overseas position presents an opportunity both to explore another culture and experience the perceived independence of expatriation.

The expatriate academic as refugee
Whilst some participants saw international mobility as an opportunity to explore a foreign country, it was clear that others had simply wanted to escape Britain. Although what they were escaping from varied, for example unemployment or personal difficulties, there was a general feeling that they were fundamentally in search of a better personal and/or professional life. Expatriation represented a refuge away from situations, relationships or experiences they associated with living in Britain. It also enabled them to carve out a better way of life or certainly something which was more aligned with their ambitions. In this respect, as indicated by Dora and Kerry below, they felt they had been proactive in having independently sought an overseas position and establishing a new life, albeit on a temporary basis.

And, erm, and there were two things, one of them was that there was a lot of things going on in the university, there was structuring and our department was vulnerable . . . There was chaos, there was managerial shifting oh, managerial games the whole time . . . All this uncertainty. I knew that if silly games kept being played at work and if things got tricky or even if I wanted to could get another job. Erm, and then, after that it was a dark miserable night in December and it was horrible and grey and I didn’t like that for another two months and I saw this job (Dora, New Zealand).

I had been trying to get things together for my career in the UK and I had come out with nothing and so it really disillusioned me . . . basically I just felt like a complete change I felt, erm, I felt very drained quite demotivated within the UK. And it just seems to have been just a struggle, you know, for quite a few years. So it was a bit of running away really (Kerry, United Arab Emirates).

The metaphor of refugee indicates that motives for expatriation can have as much to do with what is being left behind as what is on offer in the overseas location. It also emphasises that expatriation involves both leaving one country as well as arriving in another.

The expatriate academic as outsider
The majority of participants in Turkey, Singapore and the United Arab Emirates found it difficult to integrate into local communities. This led to them feeling like outsiders with little hope of forming close relationships with nationals. Whilst this might have been expected bearing in mind the
cultural distance (Hofstede, 1991) between their home and host cultures, some of those living in New Zealand also experienced similar difficulties. This can be related to Selmer’s (1997) finding that close cultural distance does not always make for easier adjustment and integration. In fact the majority of participants across all countries experienced some degree of isolation from local communities. Further, because friendships tended to be with other expatriates, usually other British expatriates, many felt their ability to integrate into local communities would be limited regardless of how long they might stay. This was especially true in Turkey and United Arab Emirates. Moreover, whilst some said host nationals were friendly, they felt that any friendships that might have developed were superficial. This emphasised their conviction that they would always be outsiders regardless of how long they stayed. By contrast, however, there was a strong sense that friendships between expatriates developed easily and reached levels of intimacy very quickly. This was attributed to their being “in the same boat” where most were looking for friends, whereas locals had well-established friendship circles.

Well I had a good social life in the last university when I left or it was getting that way. But when I looked at it it was mostly foreigners. Americans, Australians, British, not a lot from New Zealand, no couples (Dora, New Zealand).

Researcher: so, when you are living here, do you have any or much contact with nationals?
None whatsoever, I don’t know any national men, none . . . I mean all of my friends are people here at the university, people from university . . . The people I worked with [in Saudi Arabia] I liked them very much, I mean, sort of like Dunkirk spirit you know . . . So people become very close and three friends that I made there I really miss them very much, you know . . . They were all Brits actually, but there were Americans on the base . . . I mean a lot of people here are very similar to you because they live the same life. And they have moved from place to place, you know academics. So there has to be personality similarities there because everyone is living the same sort of life (Jack, UAE).

Compared with host nationals, interviewees saw themselves as more proactive in terms of establishing new friendships. This feeling was particularly acute amongst those living in specially provided accommodation located away from local communities, as indicated by Kerry:

I think that they don’t want us to gain access into their culture if you like . . . our living conditions are very much flat land where I live is very much expats . . . I mean there are special areas where expats live. I mean when I started, the year I started there were at least four or five single women that I was quite friendly with so we just hooked up together and went out and around together (Kerry, UAE).

For some this made it even more difficult to interact with locals. Many acknowledged that the ease with which they could make friends with other expatriate academics and the cohesion of expatriate communities meant that they ended up making less effort to integrate into the local community. This created a self-fulfilling prophecy, where seeing themselves as outsiders, they tended to stick together.

It’s true to say that my closest friends are expats, you know not the locals. Well you are like minded. Well, I mean I’ve found it quite easy because as I say the expats that have come out here tend to have a similar sort of outlook on life. It’s strange really, some expats who you meet seem to get the impression that when they first arrive they don’t want to get sucked up into the expat lifestyle . . . and they try to assimilate into the local community. And then after a while they realise you can’t do it (Jerry, Singapore).

A lot of the Brits stick together. So maybe you do, unless you can shake away from them you end up maybe in a situation where you are constantly surrounded by Brits on Friday nights . . . It’s kind of interesting in situations like Friday night we still stick together. Why? You know that’s the big issue, why don’t we mix with the kiwis? Mix with the Americans? God help us . . . I don’t really know that many kiwis to be honest, I mean I don’t socialise with many kiwis (Boris, New Zealand).

The outsider metaphor indicates the extent to which expatriates may feel a sense of isolation from the host culture but juxtaposes that isolation with the camaraderie developing between expatriates from the same culture. In this respect it indicates how shared “outsiderness” can foster cohesion whilst at the same time introducing the notion of a self-fulfilling prophecy dynamic.

The expatriate academic as tightrope walker
The precariousness of expatriation was a major topic. In particular, those living in Singapore, United Arab Emirates and Turkey felt their lives involved a high element of risk. For some, losing their jobs was a constant
source of concern, not least because in most cases it would also mean having to leave the country. This meant they had to be vigilant both inside and outside their work environment. Like tightrope walkers on a high wire the smallest mistake would see them plummeting to the ground, marking the end of their career in the host country. Others, notably those in New Zealand, did not see the situation quite so dramatically, although they did express concern about being without the support of family and long standing friendships.

If you come to a tenured position then that’s fine but if you come to a two or three year contract then you are putting yourself in a bit of a pressured situation . . . Say you find out that its not being renewed because you are never ever gonna know what a foreign country is up to. Could be a change of government, could be a change of politics, could be a change of head of department, whatever. So you then get pressured to find another job when you are in a strange country (Boris, New Zealand).

No, I think it’s really crap how we’ve got no rights as an expatriate worker, you’ve got no rights whatsoever, it’s an incredibly insecure position to be in . . . and then one wrong move and you are seriously on the plane tomorrow night, you really are. And it’s such a precarious position to be in because you’ve got family here and everything depends on your salary. Everything depends on what you are doing. I’m sponsoring my wife, so if I go my wife goes as well. And it’s, you know, you really have to watch everything that you are doing . . . There is no pension scheme, there’s no you’ve got nobody supporting you to invest in your own future (Harry, UAE).

Some participants contrasted this precariousness with the perceived security of expatriate managers whom they felt were in a much safer position because they were backed by their home organisation. It was felt that if managers did anything wrong they would be repatriated and slotted into a position in the home country or elsewhere.

By comparison, many participants perceived their own positions as much more precarious. Reflecting on the metaphor of a tightrope walker, the self-selecting expatriate academic walks without the support of a safety harness, whereas home country employer provides the safety harness for the assigned expatriate manager.

Metaphorical “types” and the management of self-selecting expatriates

The study on which this paper is based suggests important implications for managing both expatriate academics and other self-selecting expatriate professionals. Whilst no single metaphor represents a participant’s total response, it is possible to identify in the responses of most what Morgan calls a dominant frame (Morgan, 1997, p. 366). In the sense used here, a dominant frame is where a person mentally prioritises their experiences in such a way that an “explorer”, “outsider” or other frame appears to be given precedence.

That expatriate academics represent their experiences in this way suggests the possibility of identifying metaphorical types, and an interplay of those types, to foster more effective expatriate management practices. In this section we tentatively consider the possibility of using the four identified metaphors to better recruit, select, train and manage academics as an example of the wider group of self-selecting expatriate professionals.

Metaphors for “motivation to expatriate”

The explorer

There is some suggestion that the expatriate academic who sees expatriation as an opportunity to explore has made a conscious and thought-through decision to become an “explorer”. In other words, they have a motivation to go and this may of itself facilitate increased preparedness for expatriation. The extent to which this “type” performs well in the foreign environment can be identified through appropriate measures of performance in the host country institution.

One might also expect that their “explorer” mindset, with its connotations of independence and a search for adventure, might enable them to manage the insecurities of an overseas location more effectively. Bearing in mind that explorers have deliberately sought to experience a different culture, they may also be able to manage, and might even enjoy, the possibility of being an “outsider”. In this regard, a future research agenda relating to recruitment and selection of expatriate professionals (e.g. engineers, doctors as well as academics), might seek to
develop an understanding of the “explorer” concept. This might include whether “explorers” have superior performance, and how the concept “explorer” might be tested for in recruitment and selection processes.

Identifying the explorer metaphor enables an “explorer” construct to be developed and used in recruitment and selection processes, based on the “self-assessment” of an expatriate academic through qualitative research. A first step for future research on this theme is to investigate if there is any relationship between those who self-assess as an “explorer” and measurable job performance.

The refugee
The refugee, like the explorer, has chosen to go overseas, but for reasons of “escape” rather than exploration. Clearly, if the reasons for escaping from the home country recur in the host country the expatriate is likely to continue in the mode of refugee. This would have serious implications for retention levels. Therefore the recruitment process should include finding why candidates are leaving their current position. Reasons will of course be complex and varied, they may be related to issues of career development and progress or, because they were disillusioned with the uncertainty and insecurity of their position in the home country. In this respect it would be essential to determine whether such feelings might be replicated during the overseas appointment and whether expatriation meets the candidate’s needs in a positive way. For example, an academic leaving Britain because of uncertainty or insecurity may find the risky/precarious environment in Turkey, Singapore, or the United Arab Emirates equally unfavourable. However, if they were “escaping” to pursue a more international career or to take up a better position the precariousness might not be as problematic.

It is possible that the extent to which the refugee is leaving for more or less positive reasons will impact on how they perceive and manage the insecurity of an expatriate position. It may also impact on how they perceive being an “outsider”. From a human resource perspective, it is important to identify motivations for leaving at the recruitment and selection stage to facilitate cultural adjustment, good job performance and achievement. Therefore identifying the reasons for “escape” might encourage more appropriate and effective recruitment and selection decisions to be made.

Metaphors for how expatriation is experienced

The outsider
If an expatriate has not chosen to live overseas because of a motivation to go related to “exploring”, the experience of being an “outsider” might be more difficult to self-manage. If they experience expatriation in this way, it might have a detrimental psychological and professional outcome. Therefore it is important that an employer puts systems in place for managing such problems more effectively. We might suggest that if the feeling of being an “outsider” is experienced negatively it might impact on performance. One way of overcoming the negative experience of being an “outsider” could be through better induction and/or support programmes focusing on integration and interaction with local communities, e.g. taking part in voluntary work with the local community. A further step might be to reassess/review staff housing arrangements to encourage greater integration.

Of course, the extent to which HRM initiatives foster greater integration will ultimately depend on whether expatriates want to be integrated and if it is desirable in terms of encouraging a positive performance outcome. From an organisational perspective, “outsider” status presents no significant issue unless it has a negative impact on performance. Indeed, work in social psychology suggests that inability to integrate is not unusual as in-groups and out-groups are to be expected (Hogg and Vaughan, 1995). The major issue is how an individual expatriate academic manages being in an out-group, and how motivation to go is important in contributing to psychological maturity in dealing with being an outsider. In this respect, identifying an “explorer” mentality through the recruitment and selection process may be critical in mediating the experience of being an “outsider” – in that willingness to “explore” facilitates acceptance of being an “outsider”. These are matters for further research.

The tightrope walker
Where an overseas academic appointment involves a high degree of insecurity and precariousness, as this study suggests it does
in Singapore, United Arab Emirates or Turkey, the experience may be fraught with anxiety. Widespread insecurity may create a tense and stressful work environment, which might then produce a negative impact on performance (Arnold et al., 1995; Cohen, 1980).

From a HRM perspective, it makes sense to prepare people effectively for this kind of working environment. Therefore any precariously which might be experienced must be made explicit both at interview and in induction and orientation programmes. In particular it would be necessary to identify and remove those who have a high need for security. This can and should be done in the recruitment and selection process. Once again “explorers” may be more able to manage this insecurity/precariousness more effectively.

However, in the interests of performance, staff retention and related levels of stress, it would make sense to identify those for whom security is an important need and to recruit and select accordingly.

Conclusion

Drawing on an in-depth study of expatriate academics, this paper has argued that metaphor can be used to facilitate an in-depth understanding of how expatriation is experienced. It then suggested that the derived understanding could be used to facilitate more effective management processes of self-selecting expatriate professionals more widely defined. More specifically, it has shown how metaphorical analysis encourages the development of innovative theoretical and practical constructs for expatriate recruitment, selection, training and management. To conclude, whilst further research needs to be undertaken, it is encouraging that the use of metaphor presents a means of working towards overcoming some of the recognised deficiencies in current expatriate management practices (Brewster and Harris, 1999).

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Further reading

# Appendix

## Table A1 Table of participants

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<th>Interviewee</th>
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Note: * = Divorced