# The Impact of Self-Initiated Expatriation Experience on the Development of Global Leadership Competencies

By

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## DECLARATION

I hereby certify that this material, which I now submit for assessment on the programme of study leading to the award of Doctor of Philosophy is entirely my own work, that I have exercised reasonable care to ensure that the work is original, and does not to the best of my knowledge breach any law of copyright, and has not been taken from the work of others save and to the extent that such work has been cited and acknowledged within the text of my work.

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## Acronyms and Abbreviations

| | |
|---|---|
| CEs | Corporate Expatriates |
| CIT | Critical Incident Technique |
| EI | Emotional Intelligence |
| ELT | Experiential Learning Theory |
| GCC | Gulf Cooperation Council |
| GLC | Global Leadership Competencies |
| GLD | Global Leadership Development |
| GTM | Global Talent Management |
| HCN | Host Country National |
| HRD | Human Resource Development |
| HRM | Human Resource Management |
| IAs | International Assignments |
| ICD | International Classification of Diseases |
| IM | Impression Management |
| JCI | Joint Commission International accreditation standards |
| KSA | Kingdom of Saudi Arabia |
| LSI | Learning Style Inventory |
| MBA | Master of Business Administration |
| MNEs | Multinational Enterprises |
| PhD | Doctor of Philosophy |
| SAP | Systems, Applications and Products |
| SIEs | Self-Initiated Expatriates |
| TA | Thematic Analysis |
| UK | United Kingdom |
| UAE | United Arab Emirates |
| USA | United States of America |
| WHO | World Health Organisation |

# ABSTRACT


The Impact of Self-Initiated Expatriation Experience on
The Development of Global Leadership Competencies

Nabil El Gazzar

The principal aim of this study is to explore how the experience gained by self-initiated expatriates (SIEs) during international assignments (IAs) impacts on the development of global leadership competencies (GLC). Although IAs are considered to be the most effective way to develop successful global leaders (Kohonen, 2005; Reichard et al., 2015; Ng et al., 2009; McCall., 2010), evidence is scarce on how these leaders actually develop during an IA (Bonache et al., 2001). The research study seeks to fill this void regarding SIEs' learning and development of GLC while working abroad. The second aim of this study is to explore the GLC required by a SIE to be efficient within the context of the Gulf Cooperation Council (GCC) countries.

This thesis develops a conceptual framework by blending three separate but interrelated theories, namely experiential learning (Kolb, 1984), sensemaking (Weick, 1995) and impression management (Goffman, 1959). This conceptual framework is used as a lens to inform the research question. The core research focus is 'how does an international assignment impact on the development of global leadership competencies of SIEs?'

A qualitative research design was used in the form of 30 semi-structured interviews with top and middle level managers working in MNEs and local organisations within one of the GCC countries. Snowball sampling was used to generate the sample. Moreover, Flanagan's (1954) critical incident technique (CIT) was chosen in order to frame the subjects narratives. Thematic analysis (TA) was used to analyse the data.

The findings indicate that SIEs went through five stages of experiential learning to develop GLC and adjust cross-culturally. Moreover, it was clear from the findings that SIEs from developed countries encountered more serious challenges in comparison with SIEs from developing countries. Such discrepancies are potentially due to the lack of cultural overlap between Western SIEs' individualist cultural backgrounds and the collectivist cultures in GCC countries.

Based on the research findings, the main theoretical contribution of this thesis is the development of a framework for enhancing SIEs' learning and development of GLC, and achieving cross-cultural adjustment, coupled with the empirical study.

# CHAPTER ONE

# Introduction and Overview

## 1.1 Introduction

Due to the pace of business globalisation, and the shift in economic power from West to East (Cox, 2012), one of the most acute challenges confronting multinational enterprises (MNEs) is building strong talent pipelines (Collings et al., 2019; Al Ariss et al., 2014; Cascio and Boudreau, 2016; Tarique and Schuler, 2010; Schuler el al., 2011). According to ManpowerGroup (2020), global talent shortages have almost doubled between 2010 and 2020 as 54 per cent of organisations report skills scarcity, with businesses in 36 of 44 countries finding it more difficult to attract talented workers in 2020 than in 2018. As a matter of fact, the challenges of developing “Next Gen” leaders and lack of success in attracting and retaining top talent were respectively rated in the top five challenges by 64 per cent and 60 per cent of more than 1,000 C-level executives worldwide (EY, 2018). It is envisaged that by 2030 demand for skilled workers will outpace supply, leading to a global talent shortage of more than 85.2 million people (Korn Ferry, 2018). Although Covid-19 is posing a serious challenge for the future of global mobility (Collings and Sheeran, 2020), 90 per cent of business leaders state that global mobility results in greater career progression (Santa Fe relocation, 2019). Moreover, 58 per cent of employees consider international assignments (IAs) as a key driver to develop intercultural skills and international competencies (Ibid). Hence, the reliance on sending expatriates on IA is likely to persist on the long term.

There is extensive research on corporate expatriates (CEs) within the global talent management (GTM) literature with regards to high-potential talent development and global career management (Al Ariss, 2014; Cerdin and Brewster, 2014). However, studies concerning self-initiated expatriates (SIEs) as a potential talent pool (Vaiman et al., 2015) to fill the aforementioned skills gap are less common. The present study explores how SIEs develop global leadership competencies (GLC) during their international assignments (IAs) within the Gulf Cooperation

Council (GCC) countries with the ultimate aim of understanding how they can contribute to global talent shortages as effective global leaders.

SIEs are becoming a prevalent talented pool in our globalised marketplace (Singh et al., 2019). But despite this fact, there is a lack of researc on SIEs leadership skills development. Furthermore, there is a scarcity in research uncovering the perceptions of SIEs and the narratives (Scurry et al., 2013) they adopt to make sense of their experiences. This study aims to fill this void by considering the linkage between SIEs' learning from experience during an IA and the development of GLC within the context of the GCC countries. Moreover, this study elucidates the GLC that SIEs are required to learn and develop in order to lead effectively within the context of the GCC countries.

This chapter details the rationale for and focus of the thesis, which subsequently provided motivation for the development of the main research questions. The methodological approach undertaken is then summarised before the key contributions of the study and how they add originality are outlined. Finally, the structure of the study is previewed.

## 1.2 Research Rationale and Focus

The interest in this study stems from the researcher's background and work experience as a self-initiated expatriate which stimulated a personal interest in the topic. Although the number of SIEs is on the rise, there is scarce research on their work experiences (Jannesari et al., 2021). To the best of my knowledge no prior work that has explored this topic with regards to this category of expatriates. According to Kohonen (2005), expatriation and IAs are considered to be the most effective way to develop global effective leaders (e.g. Black et al., 1999a, b; Brake, 1997; Evans et al., 2002; Gregersen et al., 1998: Morrison et al., 1999). Moreover, global leaders' learning and development through IAs has been extensively emphasised by scholars (e.g. Black et al., 1999a, b; Briscoe and Hall, 1999; Caligiuri and Di Santo, 2001; Gregersen et al., 1998; Kamoche, 1997; Morrison et al., 1999; Morrison, 2000; Oddou et al., 2000; Peltonen, 1998; Shim and Paprock, 2002; Stanek, 2000; Suutari, 2002). On the other hand, evidence is scarce on how SIEs leaders actually develop during their IAs (Bonache et al., 2001). This could be the result of two factors. Firstly, self-initiated expatriation as a subfield of expatriation is in its infancy; hence, research is still scarce. Secondly, there appears to be a lack of conversation between the subfields of self-initiated expatriation and global leadership development (GLD).

Due to the lack of integration between the subfields of self-initiated expatriation and global leadership development, there is no established theoretical framework concerning the impact of working abroad on SIEs' learning experience in the development of global leadership skills. Few such conceptual frameworks exist with regards to CEs and those that do are not empirically validated. This study begins to fill this gap by theoretically integrating three theories in developing a theoretical framework. The theoretical framework developed for this study draws on Erwing Goffman's (1959) impression management theory, as well as integrating two additional theoretical perspectives: Weick's (1995) sensemaking theory as the back-region activity and displayed competencies as the front-region activity, and Kolb's (1984) theory on experiential learning as the activity that overlaps and connects the two regions. The aforementioned three theories included in the conceptual framework for this study are used as sensitising concepts, in order to "lay the foundation for the analysis of research data" (Bowen, 2006). A sensitising concept as emphasised by Blumer (1954, p.7) "gives the user a general sense of reference and guidance in approaching empirical instances".

This study begins to address the empirical gap regarding how expatriate managers (SIEs/CEs) learn and develop GLC during their IAs. Although the literature on GLD supports the critical role of experience gained abroad in developing GLC (McCall et al, 1988; McCall and Hollenbeck, 2002; DeRue and Wellman, 2009; Dragoni et al., 2009; McCauley et al., 1994), studies have focused instead on leadership skills and developmental challenges in general. One such framework was the right stuff model (Hollenbeck and McCall, 2001; McCall and Hollenbeck, 2002), which emphasised learned lessons by global executives during IAs. However, it did not shed light on the relationship between the challenges global executives went through while abroad and their development of GLC. The next section briefly outlines the research context of this study.

## 1.3 The Research Context

The uniqueness of the GCC countries make them interesting as a research context for several reasons. The pool of natural resources, economic appeal, and developed infrastructures (Sidani and Al Ariss, 2014) together with the inclination of locals to well-paid and more secure public sector job positions over private sector employment (Arab News, 2018), means that the region is heavily dependent on expatriate workers, with them constituting 62 per cent of the total workforce (Waxin and Bateman, 2016). More specifically, the number of expatriates as a percentage of the total population varies between a third in the Kingdom of Saudi Arabia (KSA) to 90 per cent in the United Arab Emirates (UAE) (Fitch Solutions, 2019).

Managing such a diverse workforce is not without its challenges because of 'the extreme heterogeneity of the workforce, the dynamics of managing pools of local versus foreign workers, and the distinctive regulatory environment vis-à-vis employment practices' (Sidani and Al Ariss, 2014, p.216). As a matter of fact, research has shown that the region's culturally diverse workforce was poorly managed (Al Ariss and Guo, 2016) as a result of the lag in implementing talent management processes there (Sidani and Al Ariss, 2014). Moreover, as conservative Islamic societies, the GCC countries are considered culturally tough destinations that feature impeding traditional management styles, including, for example, nepotism and authoritarianism (Sidani and Al Ariss, 2014).

Given that the GCC countries have become a top destination for both skilled and unskilled international employees who have to confront these challenges, the region provides a unique opportunity to examine the learning and development of GLC by SIE managers from both developed and developing countries.

## 1.4 Research Questions

SIEs are a vital asset to many global firms (Lee, 2005). For the last 20 years firms have targeted them in order to compensate for the lack of locally qualified staff, and to acquire talented staff to manage their branches abroad (Lee, 2005; Shahid et al., 2001; Kobrin, 1988; Edstrom and Galbraith, 1977). But, remarkably, research concerning SIEs is scare in comparison to that on CEs (Inkson et al., 1997; Suutari and Brewster, 2000; Jokinen et al., 2008; Doherty et al., 2013a), as the focus tends to be on CEs in managerial positions (McNulty and Brewster, 2017a). Self-initiated expatriation is an emerging field that lacks research and theory thickness (Doherty, 2013). One significant topic lacking research concerns leadership issues (Biemann and Andresen, 2010).

This study aims to shed light on the following question:
*How does an international assignment impact on the development of global leadership competencies of self-initiated expatriates (SIEs)?*

Moreover, it seeks to address the following secondary question:
*Which global leadership skills are required to be an effective SIE leader within the context of the GCC countries?*

## 1.5 Methodological Approach

In light of the research questions and the topic being investigated, a phenomenological approach was deemed the most appropriate research paradigm. The research design took an inductive strategy in order to build new theoretical insights. Moreover, the epistemological orientation used was interpretative, and the ontological orientation was constructivist. This study unit of analysis was the individual SIE manager. The data collection took the form of semi-structured interviews (30 in total) with SIEs subjects from developed and developing countries, holding managerial positions within public and private sectors organisations in the GCC countries.

The critical incident technique (CIT) (Flanagan, 1954) was used in order to collect the subjects' narratives. In this study a phenomenological perspective of CIT (Chell, 2004) was used. This was done by asking the subjects to retrospectively tell three stories about challenging experiences they had in the past concerning their work role during their IAs in the GCC countries and interpret these critical incidents as learning experiences that affected their development as global leaders. Thematic analysis (TA) with an inductive approach that is 'data driven'

(Braun and Clarke, 2006) was used to analyse the data from the critical incident interviews. This qualitative approach enabled the researcher to explore SIEs' subjective perceptions regarding the impact of an IA on developing GLC. The findings of this study thus contributed to the theoretical knowledge and practical implications within the field of self-initiated expatriation in a meaningful way.

## 1.6 Originality and Contributions of the Study

Overall this study generates fresh insight and adds to theoretical and empirical work on SIEs' learning and development of GLC within the context of the GCC countries. Following an extensive discussion in Chapter 6, in which the study's research questions are revisited, a model of how GLC can unfold within five stages is developed. The model is considered to be the main theoretical contribution of the study and highlights the importance of confronting cultural shock in challenging situations and devising ad-hoc strategies to learn the lessons from mistakes in order to develop and exhibit GLC.

A key contribution of this research is that it answers calls for more empirical research on how expatriates learn and develop GLC during an IA. While research to date has overly focused on theoretical frameworks rather than empirical studies, this study explores in detail the learning process SIEs undergo to develop global leadership competencies via encountered critical incidents within the unique challenging context of the GCC countries. In addition, this thesis contributes to the literature by delineating the crucial GLC that are required in order for SIEs to manage effectively within the said context. Thus, this research contributes to the growing minority of work that emphasises the importance of exploring GLD in cultural contexts other than Western developed countries (Yukl, 2012; Gao et al, 2011; House, 1995; Den Hartog et al., 1999; Dorfman et al., 1997; Hwang et al., 2015; Zhang et al., 2012; Bird and Mendenhall, 2016) as this will yield different results due to variations in leadership qualities and styles between collectivist and individualist cultures.

The originality of this thesis lies in combining experiential learning, sensemaking and impression management perspectives in order to develop a greater understanding of SIEs' experiential learning and development of GLC on both the theoretical and the empirical level. In so doing, the results of this research have significant practical implications for SIEs' career development and for human resource development (HRD) professionals' selection, recruitment and training of SIEs as a talented pool in order to cover the shortage of leaders on a global scale.

## 1.7 Structure of the dissertation

This thesis comprises six chapters. Chapter two provides a comprehensive analysis of the literature on SIEs. It begins by highlighting the differences and characteristics of a migrant, a SIE and a CE. This is followed by a discussion of SIEs' motivation in accepting IAs and their adjustment to a new culture are introduced. Next, SIEs as a talented pool of expatriates to tap in to and their suitability as global leaders is discussed. Finally, GLC are defined and the leadership competencies to be used are presented.

The third chapter introduces the experiential learning theory (ELT) as a key theoretical frame for the study. The chapter begins by introducing foundational conceptual arguments on experiential learning theory. This is followed by a presentation of both sensemaking and impression management (IM) theories. Before concluding with the introduction of the integrated approach of the three theories in the study.

Chapter four outlines the research methodology underpinning this study. Research philosophies are introduced to help rationalise the main methodological considerations that were employed in order to answer the core research questions. The data collection and analysis methods are described before the chapter concludes with an evaluation of the reliability and validity measures used for the study.

Chapter five presents the empirical findings. This section is structured around the key five themes that emerged from the thematic analysis of interviewee responses. More specifically, the chapter describes the SIEs' learning and development of GLC and adjustment to the new culture within the context of the GCC countries. The chapter delineates the global leadership skills most significant in leading successfully within the context of the GCC countries.

Finally, Chapter six presents the discussion and conclusions. It draws together the emerging findings and the theoretical framing outlined earlier to effectively answer the study's two research questions. The chapter is structured around answering the main research questions and drawing out the major contributions of the study in this regard. It concludes with the practical implications for organisations and individual SIEs before outlining the limitations of the dissertation and proposing some suggestions for future research.

# CHAPTER TWO

# The Historical Context of SIEs

## 2.1 Introduction

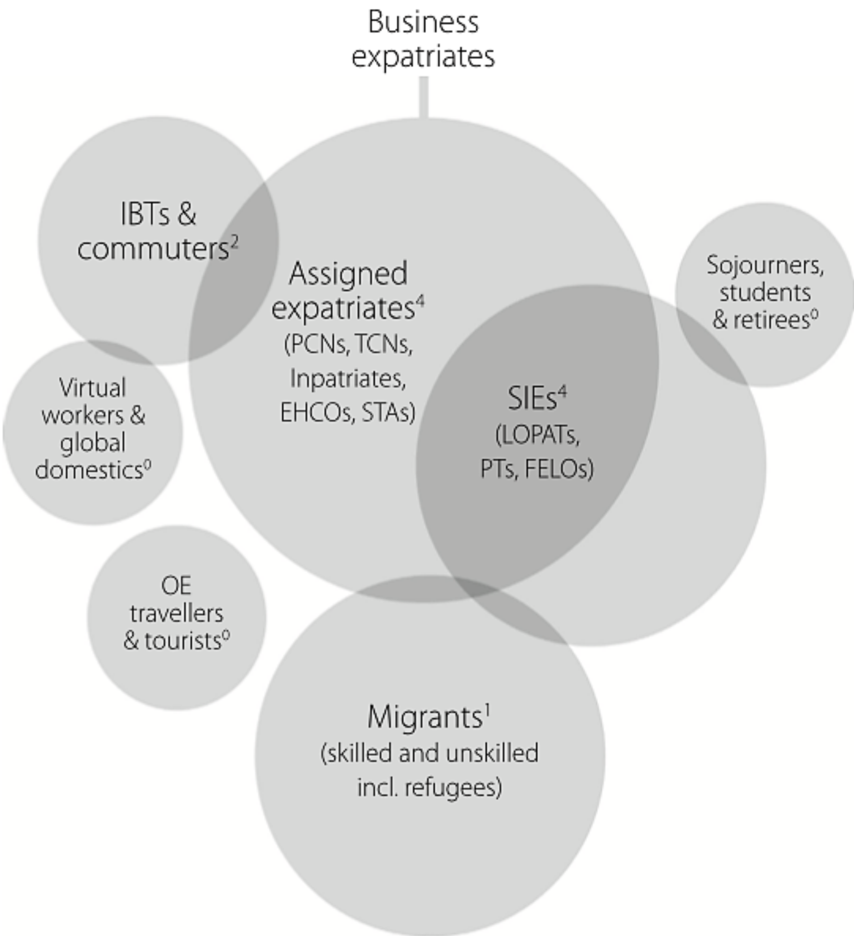
This chapter outlines the literature with regards to self-initiated expatriates (SIEs). For the purposes of this research and as a means of gaining a better understanding of self-initiated expatriation, it investigates the body of literature concerning SIEs by contrasting them with corporate expatriates (CEs). A historical background of SIEs is presented as well as their demographic characteristics in comparison with those of CEs. The chapter further examines the motivation of SIEs and CEs to start an IA and considers the cross-cultural adjustment of SIEs in contrast to that of CEs. In addition, the importance of SIEs as a talented pool of global leaders is explored. In concluding, definitions of global leadership, global leader, a competency and global leadership competencies are discussed.

## 2.2 General View on Business Expatriates

During the 2010s' several studies have developed the depiction of the various categories of expatriates, including SIEs and CEs, from a more generic illustration to a more specific one of business expatriates. In McNulty and Brewster's (2017b) generic illustration shown in Figure 2.1 expatriates are presented in a detailed prototype model as business expatriates including various types of SIEs and CEs. Business expatriates are defined by these scholars as:

> legally working individuals who reside temporarily in a country of which they are not a citizen in order to accomplish a career-related goal, being relocated abroad either by an organization, by self-initiation, or directly employed within the host country, some of whom are paid on enhanced terms and conditions to recognize their being foreigners in that country. (McNulty and Brewster, 2017a, p.30)

**Figure 2.1 Prototype Model of Business Expatriates**




(Source: McNulty and Brewster, 2017b)

Three types of SIEs are included in this prototype model. The first of these, localised expatriates (LOPATs), are defined as CEs who after the completion of their assignment decided on their own volition, or directed by their firm, to pursue their career at the host country subsidiary. The second type of SIEs include permanent transferees (PTs), described as employees who resign from the home country company and are hired by the host country subsidiary without an option for repatriation at a later stage. The third type of SIEs comprise foreign executives in local organisations (FELOs). This type encompasses employees who occupy local managerial positions supervising host country nationals. As for the five types of CEs, these include parent country nationals (PCNs), third country nationals (TCNs), inpatriates, short-term assignees (STAs) and expatriates of host country origin (EHCOs). For the purpose of this study, I will consider the third type of SIEs (FELOs) from the prototype model. The next section explains in more detail the two main categories of business expatriates, that is SIEs and CEs, which are both included under the umbrella term of migrant.

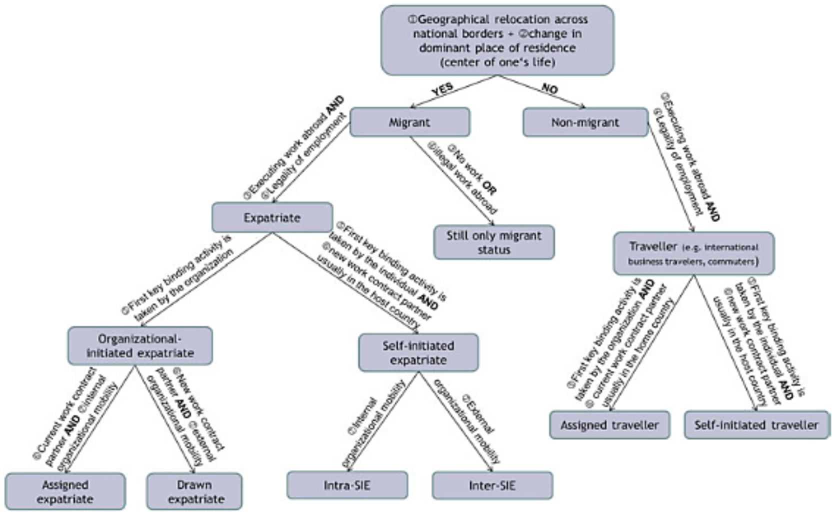
## 2.3 Categories of Migrants

Although the focus of this research is on self-initiated expatriates (SIEs), I begin by examining and differentiating between the meaning and various criteria to be considered in defining a SIE, a CE and a migrant. This will make clearer the distinction between the three terms and reduce probable conceptual confusion. Moreover, such demarcation is crucial for the purpose of this thesis as the focus will be on SIEs, which constitutes one of the main migrant categories of business expatriates. I use the decision tree in Figure 2.2 to distinguish a migrant as an expatriate (SIE and CE) from a non-migrant. According to Andresen et al.'s (2014) decision tree, there are two types of SIEs, namely Inter-SIEs and Intra-SIEs. In addition, there are two types of CEs, that is CEs and a new category named drawn expatriates.

Three criteria demarcate SIEs from CEs, namely the initiative of a key binding activity, change of work contract partner and internal versus external organisational mobility. The key difference between the two categories of SIEs is linked to who makes the decision regarding employment as such decision could be taken either by the same employer abroad (Intra-SIE) or a new employer (Inter-SIE) (Andresen et al., 2014). Intra-SIEs correspond to Altman and Baruch's (2012) distinct sub-group of corporate self-initiated expatriates. According to the researchers, these expatriates pursue an international career abroad through their organisations at home. According to many views within the literature (Cerdin and Selmer, 2014; Al-Meer, 1989; Lee, 2005; Biemann and Andresen, 2010; Bhuian et al., 2001), a self-initiated expatriate would have to change not only country but also organisation in order to be considered a SIE. This point of view finds me in agreement.

The difference between an assigned expatriate and a drawn expatriate stems from the new contract being offered to the latter from abroad by a new employer while the assigned expatriate is offered a temporary contract abroad by his employer at home (Andresen et al., 2014). For the purpose of this study I consider only one type of SIE, namely Inter-SIEs, and one type of CEs, namely assigned expatriate as defined by Andresen et al. (2014). The next three sections consider the definitions for this study of a migrant, a SIE and a CE.

**Figure 2.2: Decision Tree**

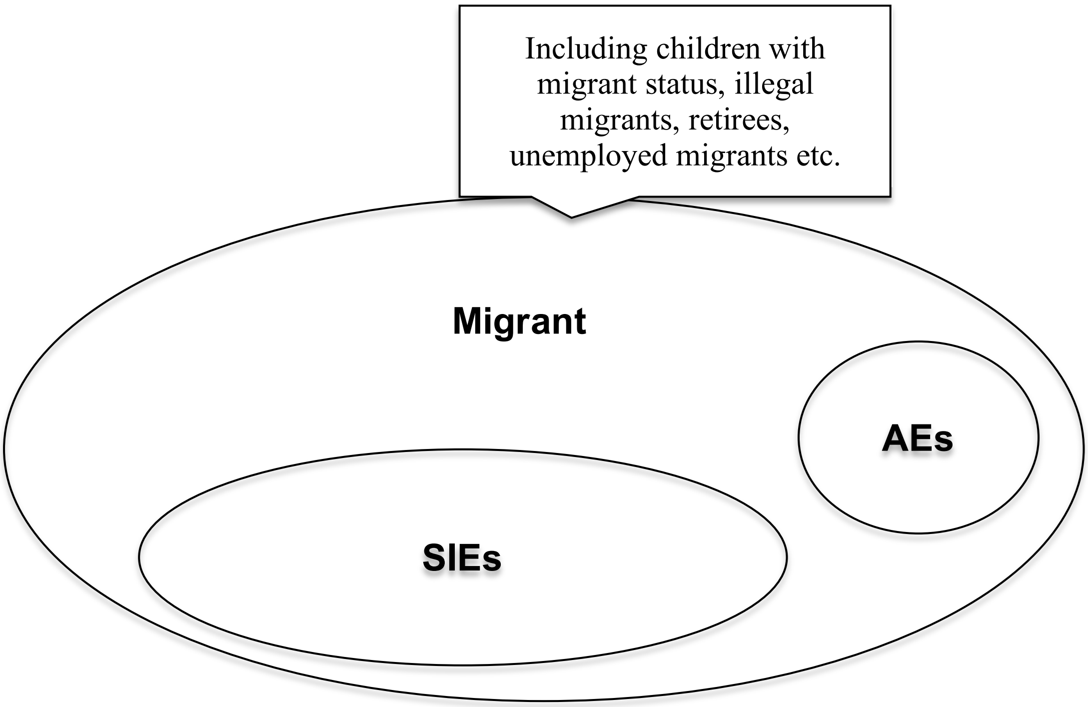



(Source: Andresen et al., 2014)

### 2.3.1 Definition of Migrant

There are several definitions of the term migrant. A broad definition would be that of the United Nations convention, which defines a migrant as “a person who is to be engaged, is engaged or has been engaged in a remunerated activity in a state of which he or she is not a national” (General Assembly of the UN, 1990). A more specific definition from the management literature defines migrants as “people who leave their home country on a long-term to permanent basis in order to live and work abroad, most with the specific intent of attaining citizenship of, and settling in, a new country” (McNulty and Brewster, 2017a, p.38). For the sake of clarity, ‘migrants’ is used in Figure 2.3 as an umbrella term. Moreover, all expatriates are migrants, however not all migrants are expatriates. For the purposes of this study migrants will be considered to be skilled expatriates (SIEs and CEs).

**Figure 2.3: Illustration of the Interrelation Between SIEs, CEs and Migrants**




(Source: Andresen et al., 2013)

### 2.3.2 Definition of Self-Initiated Expatriate (SIE)

There is a great variety and lack of accuracy in defining a SIE in the literature (Selmer et al., 2017), with a plethora of terminology being used to define the concept. Terms used to describe SIEs ranged from 'overseas experience' (Inkson et al., 1997), 'self-designed apprenticeship' (Arthur et al., 1999), 'free travellers' (Myers and Pringle, 2005), 'self-initiated foreign work experience' (Suutari and Brewster, 2000) and 'self-initiated expatriate' (Jokinen et al., 2008), 'self-made expatriates' (Tharenou and Caulfield, 2010), self-initiated movers (Thorn, 2009), 'locally hired expatriates' (Crowley-Henry, 2007), 'self-directed expatriates' (Richardson and McKenna, 2006) and self-initiated foreign employees (Fu et al., 2004). As can be seen, there is no consensus within the literature on a single term to describe this group of expatriates, however the term used in this thesis, self-initiated expatriates, is currently the most widely used.

Back from the end of the 1990s several definitions could be found in the literature depicting the various criteria to be considered a SIE. It is generally agreed that Inkson et al. (1997) were the first to coin the construct as ‘overseas experience’ (e.g. Dickmann and Doherty, 2010; Froese, 2012; Suutai and Brewster, 2000; Doherty et al., 2013b). Inkson et al. describe the overseas experience as “the initiative for international experience comes from the individual…overseas experience is, by definition, a personal odyssey, initiated and resourced by the self” (1997, p.352). The ‘overseas experience’ is termed as an adventure realised by young people in order to learn, gain experience abroad and one that is financed by themselves (Fitzgerald and Howe-Walsh, 2008). Inkson et al.’s (1997) construct was describing specifically young New Zealanders going abroad to acquire work experience. Through their study on Finnish citizens, Suutari and Brewster (2000) developed and advanced the delineation of attributes of people who travel abroad in order to live and work on their own without any help from a firm. Moreover, the term ‘overseas’ was replaced by ‘self-initiated work experience’ (Doherty et al., 2013b). This would fit the description of SIEs travelling within Europe and used as subjects in studies by European researchers. In 2010, most researchers publishing within the field agreed upon the unified construct of ‘self-initiated expatriate’ (Inkson and Richardson, 2010). The reasoning behind this specific concept is: first, ‘self-initiated’ would differentiate individuals sent by their organisation abroad from those who have chosen by free volition to move to a foreign country; second, ‘expatriate’ would set apart individuals who left their country temporarily from those who leave permanently, i.e. immigrants – a connected but qualitatively dissimilar group; third, the expression ‘foreign’ was considered identical to the term expatriate (ibid).

There is currently no common agreement as to the criteria used to define the construct of SIEs and demarcate who is considered a SIE. For example, Cerdin and Selmer (2014) used four criteria to define SIEs, namely a SIE (a) has to initiate his/her relocation abroad, (b) his/her job should be regular, (c) should have the intention to stay abroad temporarily, and (d) should be a skilled individual. Andresen et al.’s (2013) qualitative content analysis of articles on SIEs identified various definitions published between 2005 and 2010 and concluded that two criteria distinguish SIEs. The first is the decision to go abroad being taken solely by the SIE. The second criterion is the decision of employment, which is taken either by the same employer abroad (Intra-SIE) or a new employer (Inter-SIE). A more recent definition of an SIE by Selmer et al. (2017) includes three criteria: first, the decision regarding international relocation is taken only by the SIE not the firm; second, by relocating a SIE changes his/her dominant place of residence; and, third, self-initiation as a personal initiative assumes several behaviours from a SIE, such as being a self-starter, persistent and tenacious.

For the purpose of this study, I find Cerdin and Selmer's (2014) four criteria to define SIEs to be more detailed in describing and demarcating a SIE from a CE and a migrant in contrast to Andresen et al.'s (2013) two criteria or Selmer et al.'s (2017) three criteria. This is the case despite the fact that the criterion of intention to stay abroad temporarily is subjective with regard to how many years could be considered temporary. In many cases this will be determined by the migration laws of the host country (Muir et al., 2014). In this thesis a minimum period of one year will be required from the subjects in order to constitute a SIE. As for the criterion of a SIE being skilled, this is not always the case since, for example, SIEs who travelled abroad from Southern Europe for a job opportunity during the global financial and economic crisis that started in 2008 included both skilled and non-skilled individuals. However, for the purpose of this thesis I consider only highly-skilled SIEs from developed and developing countries holding managerial positions.

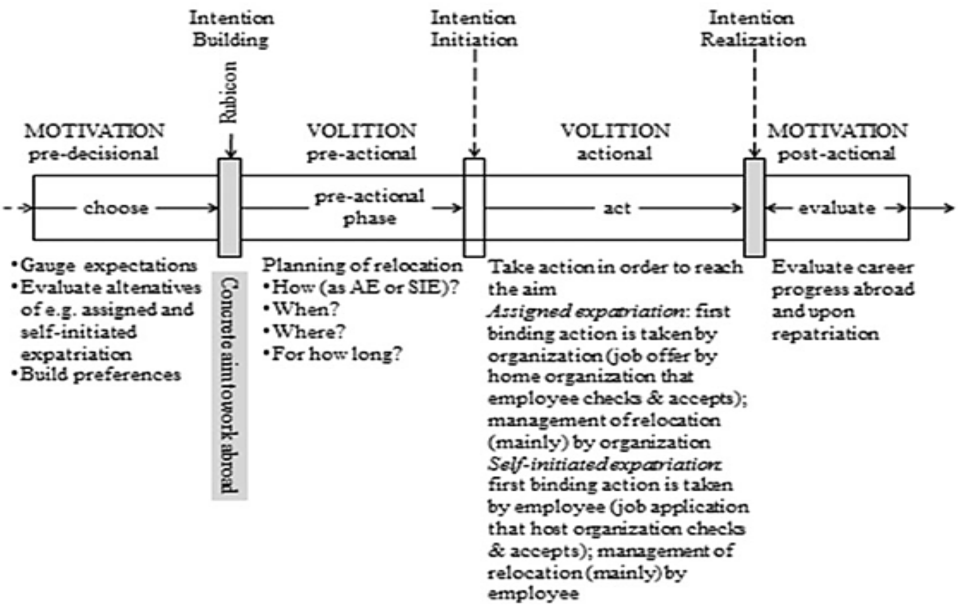
As this study concerns SIEs working in managerial positions in the GCC countries, I use Cerdin and Selmer's (2014, p.1287) definition of SIEs as "expatriates who self-initiate their international relocation with the intentions of regular employment and temporary stay, and with skills/professional qualifications". I now consider the definition of CEs in order to highlight the characteristics of this group of business expatriates in contrast to SIEs.

### 2.3.3 Definition of Corporate Expatriate (CE)

As with the definition of SIEs, several terms have been used within the literature to describe expatriates sent by their organisations abroad on an international assignment. For instance, they have been labelled as 'corporate expatriates' (Selmer, 1999), 'organisational expatriates' (Peltokorpi and Froese, 2009), ‘assigned expatriate’ (Biemann and Andresen, 2010), and ‘company-assigned expatriates’ (Tharenou, 2015). For the purpose of this study, I use the term corporate expatriate (CE). Andersen et al. (2013, p.11) define a CE as “an employee who is sent abroad by his/her firm, usually receiving a beneficial expatriate contract”.

The difference between SIEs and CEs in initiating their foreign movement can be seen in Figure 2.4, which delineates several phases they would go through in making the decision to expatriate up to the end of the cycle when they repatriate to the home country. The actional phase would be crucial in distinguishing between SIEs and CEs as a SIE will decide on their own volition to find a job abroad and relocate, whereas a CE will accept a job abroad through an initial job offer made by his/her organisation at home.

**Figure 2.4: Rubicon Model of Action Phases**




(Source: Andresen et al., 2013)

The next two sections examine the historical background of SIEs, including the demographic characteristics of SIEs and CEs and the various subcategories of SIEs, before demarcating the characteristics of SIEs that I take into consideration in my thesis.

## 2.4 Historical Background of SIEs

The two main themes previous SIE studies delved into were motivation for mobility (e.g. Thorn, 2009; Carr et al., 2005; Doherty et al., 2011; Selmer and Lauring, 2010) and adjustment (e.g. Peltokorpi, 2008; Peltokorpi and Froese, 2009; von Borell de Araujo et al., 2013; Cao et al., 2013; Alshammari, 2012). Other themes included career anchors (Cerdin and Le Pargneux, 2010; Crowley-Henry, 2007), gender and family (Tharenou, 2008, 2010; Richardson, 2006), repatriation (Tharenou and Caulfield, 2010), career capital (Jokinen et al., 2008; Rodriguez and Scurry, 2014), capital mobilisation (Al Ariss and Syed, 2011), career experiences (Al Ariss and Ozbilgin, 2010), career success (Cao et al., 2012), tax and salaries issues (Egner, 2013), work and life interaction (Mäkelä and Suutari, 2013), learning and development (Stalker and Mavin, 2011), and underemployment (Lee, 2005).

In Selmer's (2017) study on major themes in academic research articles on expatriates between 1960 and 2014, the topic of leadership was ranked 22nd, at the bottom of the ranking (Selmer, 2017). In the same study talent management was ranked 11th among the minor themes on expatriates. Such deficiency might be explained by the lack of dialogue between the fields of leadership, talent management and the expatriation. However, the majority of these research articles focused on leadership in relation to CEs and, to my knowledge, there is no research linking the literatures of leadership and talent management to SIEs. My study fills this gap in knowledge by exploring SIEs' global leadership skills development in international assignments. The need for this talented pool can be seen as vital in light of a new trend in talent management involving a shift of power from employers to employees who have taken ownership of their own career development instead of relying on their employers (Harrison and Michailova, 2013).

### 2.4.1 The Demographic Characteristics of SIEs and CEs

There is a general consensus that SIE and CE are two different terms (Inkson et al., 1997; Mo and Xia, 2010; Doherty, 2013; Suutari and Brewster, 2000; Shaffer et al., 2012), hence the dissimilarities between the two constructs in many variables. With regards to individual specific variables, Andresen et al., (2015) state that research illustrates that a typical SIE would be younger than a CE and would go abroad at the beginning of their international careers (e.g. Suutari and Brewster, 2000; Biemann and Andresen, 2010; Cerdin and Le Pargneux, 2010). Furthermore, a SIE would be more frequently single (Suutari and Brewster, 2000; Cedrin and Le Pargneux, 2010), have fewer children (Cedrin and Le Pargneux, 2010) and most often have partners working abroad (Suutari and Brewster, 2000). With respect to educational background, research shows that SIEs are very well educated (Thorn, 2009) with high professional qualifications (Tharenou and Caulfield, 2010). However, on the contrary, research shows that there are few dissimilarities in demographics between SIEs and CEs concerning age, marital status and education level (e.g. Jokinen et al., 2008; Froese and Peltokorpi, 2013; Doherty et al., 2011).

With regard to gender, according to Andresen et al. (2015), in four relevant studies SIEs samples included to a certain extent more women (e.g. Suutari and Brewster, 2000; Jokinen et al., 2008; Peltokorpi and Froese, 2009; Cerdin and Le Pargneux 2010) and in two of these studies this variance was of importance (Suutari and Brewster, 2000; Cerdin and Le Pargneux, 2010). This evidence indicates that CEs' assignments are male-dominated and SIEs' assignments are less gendered (Andresen et al., 2015). This should be taken into consideration by human resource management (HRM) departments given that the latest research shows that SIEs women have a faster career advancement due to accumulated benefits from their international experience, stimulating job positions and an increased capital accumulation (Thang et al., 2002; Myers and Pringle, 2005; Fitzgerald and Howe-Walsh, 2008). In addition, SIEs women tend to be highly qualified and experienced (Harrison and Michailova, 2013). Moreover, they have more positive work attitudes, particularly job satisfaction, than their male colleagues, even in countries with extreme cultures and traditions towards women (Bozionelos 2009; Andresen et al., 2013). The next section considers the various subcategories of SIEs.

### 2.4.2 Subcategories of SIEs

SIEs have been categorised in research in several ways (Dorsch et al., 2013). For example, Suutari and Brewster (2000) grouped SIEs in six categories, namely young opportunists, job seekers, officials, localised professionals, international professionals and dual career couples. However, this study has a crucial limitation since the sample used comprised only Finnish individuals within the engineering function. A more holistic review of SIE groupings would be that of McDonnell and Scullion (2013), because it combines several studies from a broad range of industries and a number of countries. The six subgroupings are presented in below Table 2.1.

The SIE subjects in my study belong to the subcategory of financial SIEs, the majority of whom left their home country for an IA due to the global financial and economic crisis in 2008. All 30 SIEs subjects in my thesis were senior managers from developed and developing countries who accepted job positions in local firms (private and public sectors) and MNEs.

**Table 2.1: Various Categories of SIEs**

| Group | Definition |
|---|---|
| *1. Discovering SIEs* | Young individuals who seek to travel the world and learn from new experiences |
| *2. Career-focused SIEs* | Assigned expatriates who regard their international knowledge as a ladder for career progression |
| *3. Financial SIEs* | Individuals who go abroad due to poor employment prospects at home |
| *4. Permanent SIEs* | Individuals who move abroad by themselves to work in different locations without any help from firms |
| *5. Localised SIEs* | Individuals who decide to stay at the host country after the end of their assignment and are no longer considered to be traditional expatriates |
| *6. Trailing SIEs* | SIEs could be the partner of a traditional expatriate. They would receive help from their companion's firm and thus have an easier transition |

(Source: McDonnell and Scullion, 2013; Inkson et al., 1997; Suutari and Brewster, 2000; Richardson and McKenna, 2002; Inkson and Myers, 2003; Thorn, 2009)

Studies on SIEs classified them either by their profession or function. For instance, with regards to classifications by profession, there were research studies on nurses (e.g. Bozionelos, 2009); students and travellers (e.g. Inkson et al., 1997; Inkson and Myers, 2003; Myers and Pringle, 2005), engineers (e.g. Suutari and Brewster, 2000) and several studies on academics (e.g. Selmer and Lauring, 2010; Selmer and Lauring, 2011a, 2011b; Alshammari, 2012). As for studies by function, there were some studies for non-managers (Fu et al., 2004; Bozionelos, 2009; Al Rajhi et al., 2006) and some studies comprising both managers and non-managers (e.g Suutari and Brewster, 2000; Cerdin and Le Pargneux, 2010). Three studies that did include SIEs managers and executives used subjects from developed countries only, namely Europeans, mainly from the UK, and the USA in Biemann and Andresen (2010), and Australia in the case of both Fitzgerald and Howe-Walsh (2008) and Stalker and Mavin (2011), which confirms Al Ariss's (2010) criticism that research till now has focused on individuals from developed countries. Furthermore, both Fitzgerald and Howe-Walsh (2008) and Stalker and Mavin's (2011) studies lacked a diverse sample of subjects as all SIEs were women and the sample size in both studies was very small. As for Biemann and Andresen's (2010) study, most subjects were CEs. My research avoids such drawbacks by including a sample of 30 men and women SIE subjects from developed and developing countries working in various professions and sectors of the economies of GCC countries within MNEs and local firms (public and private).

Concerning research on SIE populations within various geographies, most studies are conducted within the context of the developed world. For example, there are many studies on SIEs from Australia and Western Europe (Dorsch et al., 2013). There are, however, few studies on SIEs from the USA (ibid). In addition, many SIE studies within the context of developing countries were conducted in Europe and the majority are confined within Eastern Europe (e.g. Al Ariss, 2010; Al Ariss and Ozbilgin, 2010; Dustmann, 1999; Felker, 2011; Tung and Lazarova, 2006; William and Baláž, 2005). Research on SIEs within the context of the GCC countries is currently scarce (Doherty, 2013; Bhuian, 2001; Bozionelos, 2009) and the current study helps to fill this gap.

The next section looks at reasons for SIEs and CEs taking the decision to go abroad for work. This is of importance in my research since results from previous research show that the acquisition and development of competencies and having a challenging experience are two of the main motivations of both SIEs and CEs when deciding to go abroad.

## 2.5 Expatriation Motives of SIEs and CEs

In the last 50 years many studies researched the reasons for expatriates accepting an assignment abroad (Hippler, 2009). But while there is extensive research on the motivation of CEs (e.g. Cerdin, 2013; Dickmann et al., 2008; Stahl and Cerdin, 2004; Stahl et al., 2002), there is a dearth of studies on SIEs' motivation (Cerdin, 2013; Cerdin and Le Pargneux, 2010; Selmer and Lauring, 2011b; Dickman et al., 2008; Doherty et al., 2011). Moreover, in the first few studies there was no clear consensus in the literature review regarding SIEs' reasons for expatriation. This could be because the samples of SIEs used within these studies have different personal characteristics and professions and therefore represent a heterogenous group of expatriates. For example, in Inkson et al.'s (1997) first research on SIEs, curiosity in general rather than concrete goals was mentioned as the main motivation of New Zealander backpackers to go abroad, whereas in a later study by Richardson and McKenna, (2002; 2003) five reasons were stated for academic SIEs' expatriation, namely financial motives, family reasons, career factors, life change and relocation for adventure.

In later studies there was an attempt to compare and contrast SIEs' and CEs' motives for working abroad. Two distinctive studies with exhaustive and similar findings are those of Doherty et al. (2011) and Cerdin and Le Pargneux (2010). According to these studies, two of the main reasons to expatriate for both groups are seeking professional development and looking for a personal and professional challenge. In Doherty et al.'s (2011) study both motivations were more influential for CEs (second and third place) than for SIEs (fourth and fifth) among a total of 38 items. In Cerdin and Le Pargneux's (2010) research, however, out of just 12 items both motives were ranked first and second for SIEs and first and third for CEs. These differences may be due to the methodologies used in each study as well as to certain limitations. For example, in Doherty et al.'s study most subjects were of Western origin, half of them had no previous international work experience and no full details of their demographic and background were known.

While both studies are helpful in delineating the reasons for both SIEs and CEs to go abroad, a significant drawback, as in similar studies on motivation, is that expatriates were not asked about their personal reasons for going abroad but, rather, presented with a list of alternatives to choose from, which would lead to a narrower variety of reasons to expatriate (Hippler, 2009).

Moreover, qualitative studies on motives to expatriate are scarce and pay attention mostly to CEs and there is a call for more qualitative studies in motivation to address these limitations (Cerdin and Le Pargneux, 2010). Although researchers have studied the motivation of students, graduates and academics for going abroad (Dorsch et al., 2013), there is a paucity of research on SIE managers' motivation. This study responds to these calls by exploring the reasons for SIE managers initiating their expatriation and how their motivation affects their cross-cultural adjustment and learning and development of global leadership skills through experiential learning. In the next section the cross-cultural adjustment of SIEs and CEs is considered.

## 2.6 Cross-cultural Adjustment of SIEs and CEs

Cross-cultural adjustment is about reducing ambiguity and change in order to feel psychologically at ease within a new culture and synchronised with it (Black, 1988). An expatriate can achieve this adaptation by reducing his/her levels of anxiety and by learning or imitating local behaviours in a new culture (Peltokorpi, 2008). A well-adjusted expatriate would be open to the local culture and capable of adding new manners of behaving, laws and norms to his or her home culture (Church 1982; Peltokorpi, 2008). A number of studies reveal that the success or failure of an expatriate on an international assignment is mostly affected by his or her cross-cultural adjustment to the local culture (Caligiuri et al., 2009; Mendenhall et al., 2002). Moreover, many studies in corporate expatriation reveal that cross-cultural adjustment is considered a main predictor of job performance and satisfaction in the host country (Cao et al., 2013; Shaffer and Harrison, 1998; Bhaskar-Shrinivas et al., 2005). As for SIEs, a well-adapted self-initiated expatriate to the destination country would most probably possess more resources (emotionally, cognitively and interpersonally) than CEs in order to achieve other individual targets such as career progression and personal welfare (Cao et al., 2013).

There are several prevalent models of adjustment in the literature but the most prominent in research is that of Black et al. (1991), which despite received criticism remains in use today due to its simplicity and ease of application (Hippler et al., 2017). The three aspects of the model are as follows. First, general adaptation: psychological ease in relation to the local environment such as the weather, food and accommodation conditions. Second, adaptation to work: the degree of ease of job performance standards and work-related ethics. Third, adaptation to interactions with local people: psychological ease in connecting with individuals who possess different interpersonal styles (ibid). Moreover, Black (1988) delineates two types of adjustment, namely subjective and objective adjustment. Howe-Walsh and Schyns (2010) made some propositions to help firms support SIEs in both their subjective and objective adjustment. Their research was, however, theoretically based, while my empirical study suggests potential practical support that firms can offer to SIEs. Table 2.2 describes Black et al.'s (1991) three aspects of adjustment.

**Table 2.2: Aspects of Adjustment**

| | General adjustment | Work adjustment | Interaction adjustment |
|---|---|---|---|
| **Subjective adjustment** | Feeling familiar | Job fulfilment | Feeling comfortable in communications |
| **Objective adjustment** | Housing, social life | Accomplishments | Cooperation with local residents |

(Adapted from Black et al., 1991)

Although Black's (1988) model contributed much to our knowledge of cross-cultural adjustment, many scholars have pinpointed its drawbacks (Harrison et al., 2004; Hippler, 2000; Stahl and Caligiuri, 2005; Thomas and Lazarova, 2006). One drawback is the measurement of adjustment according to a one-dimensional component from unadjusted to adjusted (Haslberger and Brewster, 2009) when in fact adjustment has many facets of behaviours, cognitions and emotions (Kim, 1988; Shaffer et al., 2006; Ward et al., 2001), along with a personal facet and one shared with family, colleagues at work and other contacts (Haslberger and Brewster, 2009).

The capacity to adapt to the work, social and general cultural dimensions of a new culture seems to have positive effects on productivity in an international assignment (Kraimer et al., 2005; Bhaskar-Shrinivas et al., 2005). Given that the successful adjustment of a CE can predict job fulfilment and effective relationships building (Bhaskar-Shrinivas et al., 2005), knowledge of the skills that influence adaptation can be vital to the enhancement of an individual's performance in working abroad (Bird et al., 2010). Successful adjustment abroad for an expatriate will depend on how a manager can learn from experience while working abroad (Yamazaki and Kayes, 2004). But there is a scarcity of research on the relationship between expatriates' adjustment and learning while abroad (Yamazaki and Kayes, 2007). In addition, there is a paucity of research on how individuals learn and how such learning might change during adjustment while working in a new culture (ibid). More importantly, the cross-cultural adjustment process and outcome of SIEs and CEs can be expected to vary given the different context of the two groups (Al-Waqfi, 2013). There is a lack of organisational support for SIEs in comparison to CEs and, in addition, SIEs have to confront a new culture and a new employer whereas CEs would be working for the same firm (McDonnell and Scullion, 2013).

According to McDonnell and Scullion (2013) studies on expatriates' adjustment during IAs have focused on CEs, hence there is a dearth of conceptual and empirical studies that concentrate on SIEs' cross-cultural adjustment. Although few recent studies have dealt with SIEs' cross-cultural adjustment, findings in most of these works showed that SIEs adjusted better than CEs. For example, Froese and Peltokorpi's (2013) research, conducted in Japan, shows a noteworthy higher interaction adaptation for SIEs in comparison with CEs, facilitated by experiential learning via host-country language proficiency and host-country experience. The results of a second study, administered in South Korea, indicated that SIEs were rather well adapted (Froese, 2012), while a third study, conducted in Brazil (von Borell de Araujo et al., 2014), suggested that SIEs had better general, work and interaction adaptation than CEs. Furthermore, SIEs were found to be less negative and more inclined to follow local behaviours. A more recent study on SIEs and CEs as boundary spanners confirmed the efficiency of Japanese SIEs working in Japanese MNEs in China (Furusawa and Brewster, 2018), which the researchers traced to successful cross-cultural adjustment due to having lived and worked longer in the host country and speaking fluent Chinese. The findings in these studies suggest that SIEs are better adjusted than CEs within emerging market countries such as Brazil and Korea, which are known to be culturally tough, as well as in Japan, a country with a very homogenous and conservative culture. My study empirically assesses if this is the case for SIEs within the GCC countries, which, if proven, will suggest that SIEs should be considered as a potential alternative to CEs for IA in such tough cultures.

In sum, we could identify from scarce empirical studies that SIEs do adapt well abroad in comparison with CEs. On the other hand, with regard to the methodologies and samples used in existing studies, we can identify drawbacks. The majority of subjects were Europeans, Americans and Japanese, which confirms the scarcity of research on SIEs from developing countries (Al Ariss, 2010). The subjects in the study in Brazil held managerial positions, whereas a minority of the subjects were executives in the study in Japan, which also confirms the paucity of studies on SIEs holding managerial job positions. The next section describes the link between cross-cultural adaptation and GLC.

### 2.6.1 Linking Cross-Cultural Adjustment and Global Leadership Skills

There seems to be a clear indication that global leadership skills do intersect with the corporate expatriate adaptation skills domain in relation to intercultural efficiency (Bird et al., 2010). Moreover, from research on categorising global leadership skills, Mendenhall and Osland (2002) found an overlap between global leadership skills related to intercultural efficacy and aptitudes that are significant in respect of living and working abroad as an expatriate (Jokinen, 2005; Mendenhall, 2001; Mendenhall and Osland, 2002; Osland et al., 2006; Osland, 2017). In fact, as shown in Table 2.3, researchers have determined individual and external attributes that do relate to expatriates' adaptation and which seem to be conceptually similar to global leadership skills (Osland, 2017).

**Table 2.3: Individual Determinants of Expatriate Adjustment and Related Global Leadership Competencies**

| Expatriate adaptation determinants | Related global leadership skills |
|---|---|
| ***Self-efficacy*** <br> ***Resilience*** | Personal literacy, optimistic <br> Resilience, resourceful, energetic |
| ***Behavioural flexibility*** | Flexibility |
| ***Curiosity*** | Inquisitiveness, cultural interest |
| ***Extroversion*** | No relation |
| ***Broad category width*** | Savvy |
| ***Flexible attributions*** | Cognitive complexity |
| ***Open-mindedness*** | Open-mindedness |
| ***High tolerance for ambiguity*** | Duality, cognitive complexity |
| ***Empathy, respect for others*** | Cultural sensitivity, social literacy |
| ***Nonverbal communications*** | Social literacy |
| ***Relationship skills*** | Social literacy, building partnerships |
| ***Willingness to communicate*** | Social literacy, constructive dialogue |

(Source: Osland, 2017)

As the focus of my thesis is on SIEs' development of GLC, the link between SIEs' cross-cultural adjustment and their development of GLC is explored. The next section discusses the SIEs' potential as a talented pool of global leaders.

## 2.7 SIEs as a Talented Pool of Global Leaders

According to Collings et al. (2019), there is agreement that one of the most crucial challenges encountering MNEs is developing strong talent pipelines (e.g. Al Ariss et al., 2014; Cascio and Boudreau, 2016; Tarique and Schuler, 2010; Schuler et al., 2011). It has been suggested in the literature that SIEs could be a potential talented pool that can fill this shortage and, given several advantages they possess as a unique category of expatriate, even replace CEs. First, SIEs cost less than CEs in terms of travel, living costs, wages and taxation (Al Ariss and Crowley-Henri, 2013), logistical costs, cultural training (Andersen et al., 2013) and long-term commitment costs, for example pensions and permanent health insurance (Banai and Harry, 2005). For instance, a firm would spend in general two and half times more on a CE than on a locally-hired employee (McGoldrick, 1997). Moreover, SIEs are considered more efficient and, therefore, more cost-effective for firms (Banai and Harry, 2005). Second, SIEs tend to be more diverse populations; thus, firms could recruit them to increase the number of females in foreign subsidiaries (Andresen et al., 2013) and add to creative diversity at work (Harrison and Michailova, 2013). Third, SIEs have better cross-cultural adjustment, are able to adjust rapidly to the host country, and are confident in their ability to work and live in a foreign country (Tharenou and Caufield, 2010; Doherty and Dickmann 2008; Peltokorpi and Froese, 2009). Fourth, some CEs are hesitant to accept an IA (Collings et al., 2007; Doherty, 2013), or may accept moving abroad due to pressure from their company and fear of negative consequences on their career if they refuse the assignment (Biemann and Andresen, 2010; Stahl et al., 2002). Since SIEs travel abroad on their own volition (Vance, 2005; Froese, 2012; Peltokorpi and Froese, 2009), they will be more motivated to expatriation than corporate expatriates (Harris and Brewster, 1999). In addition, due to lack of opportunities in their home country and consequent reluctance to repatriate, they would tolerate cultural difference and poor fit in their job (von Borell de Araujo et al., 2014; Peltokorpi and Froese, 2009). Fifth, they would have more expertise in host countries (Inkson et al., 1997).

There are, however, some challenges for organisations in recruiting SIEs. For example, SIEs do not possess any firm-specific track record, a gap that could increase the risk of poor performance owing to a poor fit (Mayrhofer et al., 2008; Doherty et al., 2011; von Borell de Araujo et al., 2014). In order to deal with this drawback firms should follow a different approach in selecting and training SIEs (Mayrhofer et al., 2008), as well as using distinct management methods (Biemann and Andresen, 2010). Moreover, it is argued that firms are equally responsible to contribute to the development of SIEs by having in place an HRM model to speed up their adjustment at work and in private life (Stalker and Mavin, 2011; Howe-Walsh and Schyns, 2010). This is crucial for companies in order to protect their investment in recruiting and training a SIE, but also vital to the financial success of the business (Lee, 2005; Bartlett and Ghoshal, 1989; Black and Gregersen, 1999).

There is, however, currently no consensus in the literature on whether or not SIEs are a suitable replacement for CEs. Tharenou (2013), for example, argues that SIEs with senior managerial experience do possess competencies such as cross-cultural skills, local business knowledge and networks, and general international knowledge and networks. Because of these competencies, SIEs are considered a suitable replacement for CEs for jobs that involve managing the host-country culture within the subsidiary or taking charge of the local environment and market (Tharenou, 2013). In addition, SIEs are probably a good fit for technical and specialist jobs in lower and middle management positions, though they may be less suitable for jobs requiring control and coordination, transfer, and managing a subsidiary's operations, particularly at start-up.

In contrast, Haslberger and Vaiman (2013) claim that SIEs are considered to have a distinct role in international firms due to their distinctive position between local employees and CEs. SIEs' contracts are subject to local terms and conditions, but their outlook is non-native (ibid). They might, therefore, be better than CEs at covering critical job positions and function as bridge builders and integrators (Haslberger and Vaiman, 2013; Adler, 2002; Stroh et al., 2005). In the same vein, Furusawa and Brewster's (2018) study shows that Japanese SIEs are a good option to replace Japanese CEs in China as they live and work longer in the host country, are proficient in the Chinese language and build a trustworthy relationship with CEs, local employees and the parent company in Japan.

My study investigates the current roles of SIEs in the GCC countries within MNEs and local firms, as an alternative to CEs, and the practical implications for HRD professionals in the selection, recruitment and retainment of SIEs. The next section discusses and clarifies the definition of a global leader and global leadership as well as the GLC considered in my thesis.

## 2.8 Definition of Global Leadership and Global Leader

There is a consensus among scholars that global leadership differs from traditional or domestic leadership (Jokinen, 2005; Osland and Bird, 2006; Mendenhall, 2017). Jokinen (2005) claimed that the assumption might be that either global leaders have dissimilar competencies from those required for a local leader or that they developed their general skills to a higher global level. Mendenhall argued that "the global context significantly increases for leaders the valence, intensity and complexity of key contextual dimensions that also exist for those leading in a domestic context" (2017, p.16). More specifically, global leadership is dissimilar to domestic leadership in degree regarding matters linked to boundary spanning, ethical challenges, coping with stress and contradictions, developing learning environments, community and teams and leading change efforts across various cultures (Osland and Bird, 2006). In addition, global leadership differs in kind from domestic leadership in that transformational experience can be triggered by the nature of the outcomes the global context potentially can produce in them as they live and work in it (Osland, 1995). For the purpose of my study I consider Reiche et al.'s definition of global leadership:

> Global leadership is the processes and actions through which an individual influences a range of internal and external constituents from multiple national cultures and jurisdictions in a context characterized by significant levels of task and relationship complexity. (2017, p.562)

There is also an agreement in the literature that the terms 'management' and 'leadership' differ in relation to processes (Jokinen, 2005; Kotter, 1982), but that there is an overlap in some of their dimensions. Moreover, an efficient leader needs to possess vital competencies to be simultaneously a good leader and a good manager (Yukl, 2006). The definition I use in this study to define global leader is the following:

> An individual who inspires a group of people to willingly pursue a positive vision in an effectively organized fashion while fostering individual and collective growth in a context characterized by significant levels of complexity, flow and presence. (Mendenhall et al., 2012, p.26)

In preparation for my discussion in Chapter 6 of the GLC learned and developed by SIEs during their IAs in the GCC countries, the next section starts by defining a competency. It then defines global leadership competencies and concludes with the group of global leadership competencies considered in this study as a benchmark for the subjects' global leadership learning and development.

### 2.8.1 Definition of a Competency

There is an agreement in the literature that skills differ from abilities (Matthews et al., 1992). According to Chell (2013), exercising a skill produces proficiency in tasks whereas abilities are similar to more general traits. But Chell (2013) contends that some scholars nevertheless combine both, proclaiming that they fall under the general umbrella term "competencies" and allude to what a person has the potential to do (e.g. Mischel, 1973). With regards to the concept of competency in the workplace, in his seminal work McClelland defined a competency (1973, quoted in Bird and Stevens, 2017, p.212) as “a set of underlying characteristics that an individual or team possess that have been demonstrated to predict superior or effective performance in a job”. For the purpose of my study I consider this definition of a competency. The next section examines the definition of GLC and the framework of GLC categories considered in my thesis.

### 2.8.2 Global Leadership Competencies

According to Jokinen (2008) there is little consensus among scholars regarding the definition of global competence (e.g. Beechler et al., 1999; Jokinen, 2005; Mendenhall, 2006; Beechler and Javidan, 2007; Bhagat et al., 2007; Osland, 2008). Jokinen argued that:

> Competencies have been defined with terms describing certain personal traits, behaviours, skills, values, and knowledge, and many existing frameworks are combinations of these. In existing research, different types of dimensions have often been mixed and treated as equals. A certain trait in one framework is replaced with corresponding behaviour in another. (2005, p.201)

For the sake of clarity, I therefore consider the following definition of global leadership competencies (GLC) in my research:

> those universal qualities that enable individuals to perform their job outside their own national as well as organizational culture, no matter what their educational or ethnic background is, what functional area their job description represents, or what organization they come from. (Jokinen, 2005, p.200)

For the purpose of this study, I utilise the terms global leadership competencies (GLC) and global leadership skills interchangeably.

From early 1990s onwards an increasing number of researchers studied global leaders, aiming to describe the competencies crucial for their success (e.g. Bird and Osland, 2004; Jokinen, 2005; Mendenhall and Osland, 2002; Osland, 2008; Osland, et al., 2012a; 2012b; 2012c). Scholars have described over 200 competencies that impact global leadership efficiency (Bird, 2017), however numerous competencies overlap conceptually and are frequently set apart only by sematic differences (Jokinen, 2005; Osland, et al., 2012a). After reviewing theoretical and empirical studies published between 1993 and 2016, Bird (2017) proposed the following three categories of competencies: business and organisational acumen, managing people and relationships, and managing self. The purpose of using specific categories of GLC in my study is to achieve conceptual clarity as such an integration and synthesis is beneficial “in order to remove conceptual overlap, minimise semantic variation and achieve theoretical frugality resulting in a more parsimonious set of fifteen competencies” (Bird and Mendenhall, 2016, p.122). Moreover, doing so will increase the likelihood that the interpretation of empirical results will be less problematic, and the accumulation and integration of findings will be more easily achieved (Bird, 2017).

The first group of competencies, namely business and organisational acumen, links to the practical comprehension of business and organisational actualities and how things get done in an efficient and effective way (Bird, 2017). This group of competencies will not be considered in this study, firstly because the reason SIEs were recruited by their employers in the GCC countries was their expertise and proven business and organisational acumen skills. Secondly, the focus of my study is on interpersonal and self skills which are a subset of GLC linked primarily with cross-cultural efficacy. This is in agreement with Bird (2017) study of GLC.

The second group of competencies are the managing people and relationships competencies which constitute leadership at “close quarters” (i.e. leadership with people in direct interaction, frequently in person) (Bird, 2017). These competencies focus in general on managing people and interpersonal relationships (ibid). Managing people and relationships entail five composite competencies: cross-cultural communication, interpersonal skills, valuing people, empowering others, and teaming skills. Out of the five competencies, the first three account for approximately 70 percent of all dimensions mentioned. In this group of competencies, 47 competency dimensions were identified (ibid).

The third group of competencies are those of managing self. The emphasis of this group of competencies is on the predispositional, cognitive, and attitudinal procedures in the mind of the global leader, or relate to features of personal management (Bird, 2017). The competencies of managing self consist of five composite competencies: character, resilience, inquisitiveness, flexibility and global mindset. It is noteworthy that resilience, inquisitiveness and flexibility received numerous citations, while the global mindset composite received the least citations. The first three composites collected 75 per cent of the dimensions, with the composite of character having the most with 17 dimensions and global mindset the least with four (ibid). Detailed definitions of both groups' competencies (Bird, 2017) are given in appendix H.

## 2.9 Conclusion

This chapter provided a comprehensive historical background of the development of research with regards to SIEs. Such a review was important in delineating the differences between a migrant, a CE and a SIE. Inherent in this analysis is the role of SIEs' motivation for expatriation and cross-cultural adjustment while on an IA, a topic overlooked in the literature as the focus has been on CEs' motives and cross-cultural adaptation. After discussing the GCC countries as the context of this thesis and SIEs as a potential pool of leaders to fill the current talent shortage, this chapter concluded by considering the definitions of global leadership, global leaders and GLC and by detailing the framework of GLC categories used in this thesis. The next chapter reviews the three theories adopted in this study and their integration to culminate in the theoretical framework that is used as a lens to inform the research question.

# CHAPTER THREE

## Theoretical Perspective of The Study

### 3.1 Introduction

This chapter introduces experiential learning theory (Kolb, 1984), sensemaking theory (Weick, 1995) and impression management theory (Goffman, 1959) with a particular focus on how the use of these theories has evolved in the literature. Moreover, the way in which these theories have been applied in the expatriation and global leadership development literatures will be discussed. Taking this into account, a further elucidation on the integration of these theories in a novel way to present my theoretical framework will be presented for the purpose of analysing the data and investigating the research question of this study.

As the main research question of this thesis examines how SIEs learn from experience and develop GLC while working on an IA, the next section will consider the definitions of learning and development and the differentiation between both before discussing ELT.

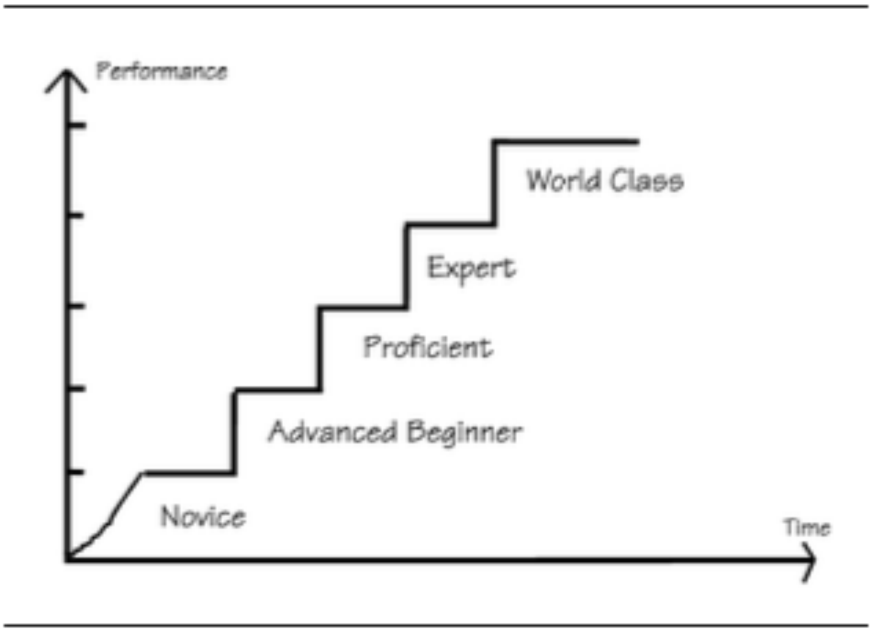
### 3.2 Definition of Learning and Development

The differentiation between learning and development is significant within an organisational context (Garavan, 1997). According to Garavan, learning and development have the same meaning to some researchers (e.g., Hales, 1986; Harrison, 1993; Reid and Barrington, 1994) but are considered distinct in nature to other scholars (Jarvis, 1995; Paterson,1979) writing outside the HRM subject area. There is great difficulty in defining 'learning' due to a lack of consensus among scholars on a broadly accepted definition (Garavan, 1997), combined with the challenge that it covers a broad range of conditions (Merrian and Caffarella, 1991). According to behavioural theorists, learning is defined as a procedure by which behaviour changes as an outcome of experience (e.g., Maples and Webster, 1980). Moreover, these scholars consider learning as essentially externally induced (Garavan, 1997). On the other hand, social learning and cognitivist theorists (Bandura 1986; Hergenhahn, 1988) define learning as a relatively permanent change in behaviour or in behavioural potential as a consequence of experience. The latter will be considered in this study as it expresses the cognitive learning that a SIE should go through to learn from experience.

Within HRM literature 'development' as an idea encompasses both the outer reality of the environment and organisational targets and the inner reality of the emerging self (Garavan, 1997). Hence, Pedlar (1995) defined 'development' as making the most that one can out of opportunities in both internal and external spheres. As for Baum (1995), he defines 'development' as a procedure that can occur at any time and is not restrained by formal parameters or at designated times within a person's life cycle. Such 'development' is neither limited to coaching or classroom situations, nor is it a situational term confined to formal or planned group sessions (ibid). According to Garavan (1997), it is significant that the concept of 'development' allows for substantial variety as to how it takes place, where and when. Moreover, Garavan posits that within definitions on HRD (e.g., Baum, 1995; Lauermann, 1992; McIntosh, 1994), there is an emphasis on the learner instead of the learning *per se* as the focus is on improving jobs by improving employees. Baum's (1995) definition of 'development' will be adopted in this thesis as it describes the informal development that a SIE will follow to develop his/her GLC.

According to Garavan (1997), within a developmental HRD model employees have to think for themselves with regards to their learning, thus they should be directing their own learning. In the same vein, McCall and Hollenbeck (2002) argue that global executives should take responsibility for developing their global competencies through learning. Learning can be considered as an umbrella term that includes 'development', all aspects of which tend to be defined on the ground, in practical instead of theoretical terms (Garavan, 1997). In the case of this study, an SIE's learning of competencies develops through trial and error via repetitive challenging experiences leading to the gaining of knowledge within the foreign cultural context. Hence, from a novice level SIEs achieve the level of an expert, as shown below in figure 3.1.

**Figure 3.1: The Levels of Competence Development**




(Source: Dreyfus and Dreyfus, 1986)

Several models have been suggested to illustrate the procedure of learning as an outcome of reflective thought (Drejer, 2000). Perhaps the best-known approach on learning from experience is that of Kolb (1984). In the next section ELT is defined and the use of this theory in management is discussed, and critiques of ELT are then considered.

## 3.3 Experiential Learning Theory

Throughout much of the twentieth century the focus within the fields of organisational behaviour and management was on performance as the main dependent variable for theories and concepts (Kolb, 1984). However, in the twenty-first century there has been a shift of attention away from the measurement of organisational and managerial performance, because such a focus tends to result in limited and short-term manipulation at the expense of long-term sustainability, toward measures of learning and adjustment to change (Kolb and Kolb, 2009). With his seminal work, Kolb (1984) has been a contributor and proponent of this shift in perspective. In addition, ELT is based on the work of acclaimed researchers from the past century who gave experience an essential role in their theories of human learning and development – remarkably John

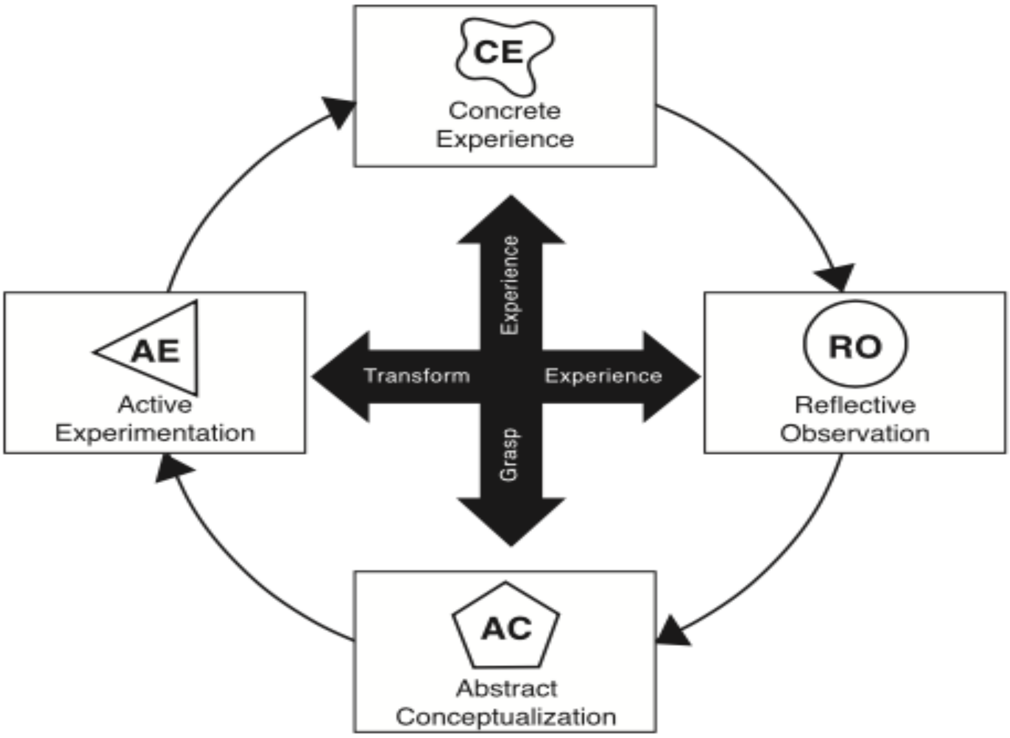
Dewey, Kurt Lewin, Jean Piaget, William James, Carl Jung, Paulo Freire, Carl Rogers and others – with the goal of developing a dynamic and holistic model of the learning from experience activity and a multi-linear model of adult development (Joy and Kolb, 2009).

### 3.3.1 Definition of Experiential Learning Theory

Experiential learning has been defined in a narrow or broad way depending on the scholar's views. A common usage of the term defines experiential learning as "a particular form of learning from life experience, often contrasted with lecture and classroom" (Kolb and Kolb, 2017, p. 13). A narrow use of the term defines experiential learning as situations in which previous experiences are accredited and as a result incorporated into programmes of formal learning (Evans, 1992). As a theory, experiential learning is not confined to formal education classrooms but is applicable in all arenas of life due to its holistic and dynamic nature in the process of learning from experience, and as a multi-dimensional model of adult development (Kolb and Kolb, 2017). In his seminal book, Kolb (1984) defines ELT as "the process whereby knowledge is created through the transformation of experience. Knowledge results from the combination of grasping and transforming experience'' (Kolb, 1984, p. 38).

Knowledge, according to Kolb (2015), occurs from the blending of grasping and transforming experience. Moreover, grasping experience alludes to the procedure of taking in information, and transforming experience is how individuals explain and act upon that information (ibid). Experiential learning cycle illustrates in figure 3.2 two opposing modes of grasping or taking in information, that is concrete experience versus abstract experience, and two opposing modes of transforming or processing that information, namely reflective observation versus active experimentation (Lewis and Williams, 1994). Learning results from the creative tension among these four learning modes (Kolb, 2015). The learner has to negotiate all four stages of the learning cycle in order for meaningful learning to occur (Lewis and Williams, 1994), that is experiencing (CE), reflecting (RO), thinking (AC), and acting (AE) in a repetitive process that is sensitive to the learning situation and what is being learned (Kolb, 2015). Within this learning cycle of four stages, concrete experiences are the cornerstone for reflections (ibid). These reflections are grasped into abstract conceptions from which new implications for action can be concluded, actively tested and serve as templates in creating new experiences (ibid).

**Figure 3.2: The Experiential Learning Cycle**




(Source: Kolb and Kolb, 2017)

### 3.3.2 Experiential Learning in Management

Despite the fact that a variation of experiential learning theory has been suggested, Kolb's (1984) version is still one of the most dominant theories of how managers learn from experience (Yamazaki and Kayes, 2004; Kayes, 2002; Yuen and Lee, 1994). Since the development of Kolb's theory in the late 1960s, many management topics have been impacted by experiential learning theory (Kayes, 2002), including person-job interaction (Sims, 1983), research and development team (Carlsson et al., 1976), organisational systems (Dixon, 1994), strategy development (Van der Heijden, 1996), design of management education (Lengnick-Hall and Sanders, 1997), job counselling (Hunt, 1987) and leadership (Kolb and Kolb, 2009; Robinson, 2005; Kayes et al., 2005a).

A growing stream of studies (e.g., Porter and Tansky, 1999; Ratiu, 1983; Spreitzer et al., 1997) put emphasis on the idea that a successful cross-cultural adjustment relies on how well an expatriate manager can learn from experience during an IA (Yamazaki and Kayes, 2004). Such rigorous cultural experience focuses on the holistic development of individuals by exposing them to the challenges of working and living in a foreign cultural context (Leung et al., 2008). Moreover, the growing attention on experiential perspectives on global leadership development might stem from the significance accrued to international experience (Ng et al., 2009).

A majority of business leaders do acknowledge the developmental value of IAs which results in greater career progression (Santa Fe, 2019). The adoption of such a developmental approach should put emphasis on learning effectiveness instead of work effectiveness (Ng et al., 2009). This perspective accepts that failures during IAs can present exceptional learning opportunities that support individuals in sharpening their GLC (Hall et al., 2001). Hence, the focus of my conceptual framework will be the theory of experiential learning in order to explore my main research question. The next section discusses the criticism that ELT has received.

### 3.3.3 Experiential Learning Theory and its Critics

The first criticism with regards to ELT concerns the empirical validation of the theory (Kayes, 2002). This critique questions the psychometric properties of the Learning Style Inventory (LSI), designed as a self-diagnostic tool for managers and students to evaluate their learning along the four dimensions of experiential learning (Freedman and Stumpf,1980). In response, Kolb redesigned the LSI twice and initial results demonstrate that the updated versions largely dealt with earlier concerns (see Greer and Dunlap, 1997; Loo, 1999). A second critique underlines the theoretical limitations of the theory's early formulation (Kayes, 2001). Critics point to the theory's emphasis on the essential role of experience concerning learning, which puts an emphasis on the individual experience at the expense of the social, psychodynamic and institutional features of learning (Vince, 1998; Reynolds, 1999; Holman et al., 1997).

Most critics of ELT appear to be questioning the psychometric properties of ELT and its measurements (Freedman and Stumpf, 1980). In acknowledgment of such criticism, Kolb redesigned the learning style inventory in 1985 and again in 1999, which largely addressed previous concerns (Kayes, 2002). A second form of criticism points to the theoretical foundations of ELT, suggesting that it provides only a limited account of the learning process (Kayes, 2001). However, such criticism is problematic as it is influenced by critical theory and social criticism (e.g. Habermas, Marx) which is opposed to pragmatic-humanism proposed by Dewey and Maslow (Kayes, 2002). Hence, much of the criticism of ELT is due to essentially different assumptions about the nature of management learning (Kayes, 2002).

Lastly, criticism that ELT has a lack of sufficient institutional standing to have an impact on academic advancement (Freedman and Stumpf, 1980; Miettinen, 1998) may suffer from professional myopia that confines learning research to an extremely consensual body of knowledge (Kayes, 2002). The debate in organisational studies resides in whether the field should embrace multiple approaches, paradigms and theories (Kayes, 2002). Furthermore, Kayes argues that if the goal of research in management learning is increasing learning in the academy, then experiential learning might be used as a guide. Additionally, if the best learning systems result in diversity, then the best perspective to advance management learning is by broadening not narrowing the field of inclusion (Kayes, 2002).

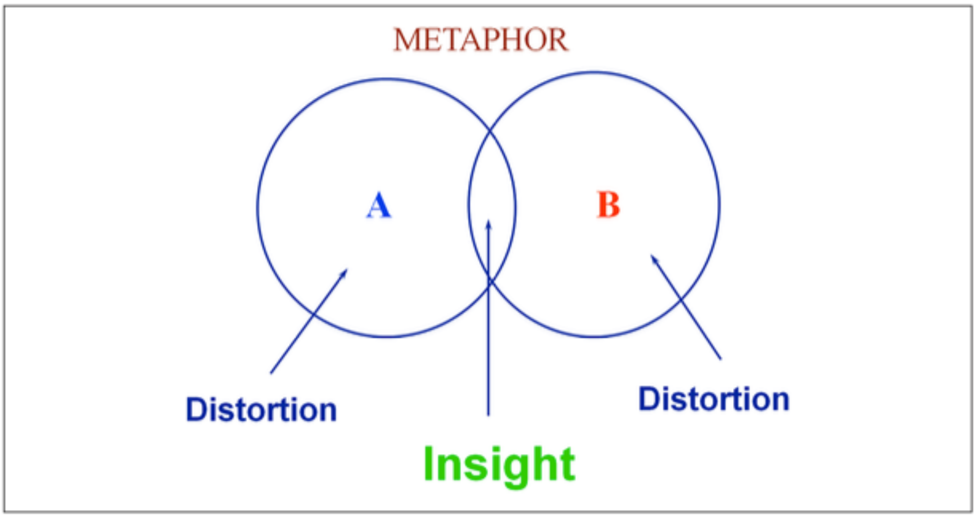
However, Kolb's learning theory has received significant empirical support (Kayes, 2002; Vince, 1998; Yamazaki and Kayes, 2004). Moreover, since 2000 research on ELT has increased fourfold (Kolb, 2015), while a review of management education research has shown that 27 per cent of top cited articles in management education journals were about ELT (Arbaugh et al., 2013). Additionally, as ELT has received extensive attention in the management development literature (Kayes, 2002; Kayes et al., 2005a, b; Kolb and Kolb, 2005; Yamazaki and Kayes, 2004), a stream of research has suggested the use of ELT in examining the development of GLC for leaders (e.g., Ng et al., 2009; Yamazaki and Kayes, 2004; Schwandt, 2005). Acknowledging the importance of this research, this study addresses the development of global leadership skills by adopting ELT as the basis of the conceptual framework to explore SIEs learning from experience during an IA.

As the next two theories which are part of my conceptual framework, namely sensemaking and IM, use metaphors, a clarification in the next section about the use of metaphors in organisational theories is presented to prepare for a discussion of the theories.

## 3.4 Organisational Theories as Metaphors

Metaphor is one of the most frequently used examples of a trope. A trope is defined as: “the generic term for figures of speech in which a word is used in a nonliteral way” (Parry, 2008, p.6). Tropes indicating similarity include metaphor, analogy, simile, metonymy and synecdoche. Tropes indicating difference include anomaly, irony and paradox (ibid). But within theorising about organisations, a metaphor is defined as referring to “a cross-domain mapping in the conceptual system” (Lakoff, 1993, p. 203). Hence, a metaphor is more than just a figure of speech or rhetorical trope (Cornelissen and Kafouros, 2008), as it is “a salient and pervasive cognitive process that links conceptualisation and language” (Fauconnier, 1997, p. 168). In his ground-breaking work ‘Images of Organisation’, Morgan (1986) used eight metaphors to understand and solve an organisation’s problems, namely the organisation as a machine, organism, brain, culture, political system, psychic prison, instrument of domination and flux and transformation (Digha, 2014). According to Morgan (2011), a metaphor is defined as a direct or inferred procedure that claims, “A is B”, as shown in figure 3.3. In this case the metaphor functions through the juxtaposition of images, as for instance in “the organisation is a machine”, where one element is apprehended in terms of another and this contributes to a novel way of seeing, acting and grasping in any given circumstances, frequently resulting in challenging taken for granted methods of understanding (Morgan, 2016). Moreover, as Morgan (1986, p.17) argues, through metaphor “we have a means of enhancing our capacity for creative yet disciplined thought, in a way that allows us to grasp and deal with the many-sided character of organisational life". All in all, Morgan (2006) asserts that metaphors present a one-sided insight in describing organisations and, while their use is biased, incomplete and possibly misleading, they create new ways of seeing things and present opportunities for new theories.

**Figure 3.3 Metaphor – A Process of Seeing A as B**




(Source: Morgan, 2011)

Morgan's (1986) seminal work had an influence on organisation theory, encouraging scholars to become aware of their preferred metaphors and to investigate the likelihood of finding new ones (e.g., Alvesson, 1993; Cornelissen, 2005; Cornelissen et al., 2008; Grant, 2004; Grant and Oswick, 1996; Oswick and Grant, 1996; Oswick et al., 2002; Tsoukas 1991; 1993). The metaphor perspective has also been applied to the analysis of specific features of organisation and management, for example, on strategy (Mintzberg et al., 2005), on managing projects (Winter, 2009) and on leadership (Avesson and Spicer, 2011).

Within organisational theories various metaphors have been used within expatriation literature to describe how CE/SIE leaders make sense of their new environment and strive to manage their impressions when communicating with locals in order to adjust to a challenging new cultural context. When an event is triggered an expatriate/leader has to frame the situation, make attributions and select a suitable script to manage impressions accordingly. Boxenbaum and Rouleau (2011, p.277) argue that "the notion of script contains metaphorical elements from the source domain of theatre, notably the idea of a stage and scripted dialogue and behaviour". As for Parry (2008, p.9), he asserts that "this idea of 'sensemaking' is perhaps the best metaphor for leadership" since the crux of leadership lies in sensemaking, a leader's role consisting of making sense of a situation encountered and conveying that sense to their followers as sense giving (ibid). The integration of sensemaking and IM theories as metaphors therefore brings novel insights on how SIEs learn and develop GLC in a challenging new cultural context.

In the following section the sensemaking concept is described and defined before intercultural sensemaking to expatriation is presented and sense-giving and sense-breaking related constructs to sensemaking are introduced. Lastly, the critique of sensemaking in the literature is examined.

## 3.5 Sensemaking Theory

The concept of sensemaking – the procedure through which individuals work to understand unfamiliar, unpredicted or ambiguous events – has become a paramount topic in the study of firms (Maitlis and Christianson, 2014). When members of an organisation face uncertain and confusing moments, they seek to shed light on what is going on by the extraction and interpretation of cues from their environment. They then use these as a cornerstone for a likely account that would provide order and ''make sense'' of what has happened, and through which they proceed to enact the environment (Brown, 2000; Maitlis, 2005; Weick, 1995; Weick et al., 2005). Sensemaking involves interpretation as well as authoring of events and frameworks in order to understand, as people play a role in the construction of the very situations they aim to comprehend (Weick, 1995; Weick et al., 2005). There is a rapidly increasing body of research on sensemaking within the literature on organisations, which examines how sense is made in firms (e.g., Clark and Geppert, 2011; Cornelissen, 2012; Hernes and Maitlis, 2010a; Monin et al., 2013; Navis and Glynn, 2011; Rudolph et al., 2009; Sonenshein, 2007; Whiteman and Cooper, 2011), as well as the effect of sensemaking on various companies' processes, comprising strategic change and decision making (Gioia and Thomas, 1996; Rerup and Feldman, 2011; Sonenshein, 2010), innovation and creativity (Drazin et al., 1999; Hill and Levenhagen, 1995), and learning in firms (Blatt et al., 2006; Catino and Patriotta, 2013; Gephart, 1993; Weick, 1988; 1990; 1993). Hence, sensemaking is an essential activity in companies and a central one in organising (Maitlis and Christianson, 2014). The next section discusses the use of sensemaking in the literature as a theory and as a perspective.

### 3.5.1 Sensemaking as a Theory or a Perspective

To define sensemaking is a challenging task since there are a number of alternative forms in how it is applied (Maitlis and Christianson, 2014). While some academics refer to sensemaking as a theory (Holt and Cornelissen, 2013; Jensen et al., 2009; Stein, 2004), there is no single theory of sensemaking (Maitlis and Christianson, 2014). As a matter of fact, many other scholars (e.g., Drazin et al.,1999; Hsieh et al., 2011; Schultz and Hernes, 2013) agree with Weick's reference to sensemaking as a 'perspective', referring to his definition of sensemaking as 'a developing set of ideas with explanatory possibilities' (Weick, 1995, p.ix) and noting that 'there is no such thing as a theory of organisations that is characteristic of the sensemaking paradigm' (Weick, 1995, p.69). Other scholars make reference to a 'sensemaking lens' (Sonenshein, 2009; Stensaker and Falkenberg, 2007; Vough, 2012), while other writers (e.g., Helms Mills et al., 2006; Mikkelsen, 2013) refer to Weick's (1995) 'sensemaking framework' with its seven properties (Maitlis and Christianson, 2014). Sensemaking is frequently cited as a common notion, without a related definition. But even when sensemaking is defined, several meanings are linked to it (ibid).

Although it is considered as a theory within the literature, in my view sensemaking can be seen more as a perspective than a theory since Weick (1995), the father of sensemaking, refers to 70 definitions of sensemaking (Ancona et al., 2007). Moreover, it is described as a set of developing ideas with explanatory possibilities, instead of a body of knowledge (Weick, 1995). In addition, sensemaking is viewed as a form of a discussion in progress (ibid). The next section considers sensemaking definitions.

### 3.5.2 Definitions of Sensemaking

Sensemaking has several definitions within the literature. Some are concerned with sensemaking within organisations (e.g., Weick, 1995), while others are concerned with sensemaking between or within people (Maitlis and Christianson, 2014). In his seminal book Weick defined sensemaking as a perspective encompassing seven characteristics, that is ''a process that is grounded in identity, retrospective, enactive of sensible environments, social, ongoing, focused on and by extracted cues driven by plausibility rather than accuracy'' (1995, p.17), going on to describe the seven characteristics of the sensemaking perspective as follows:

a. Grounded in identity construction – The self-identity of the actor and the identity of the firm combined intricately in order to form and sustain a constructed social meaning attributed to events (Schwandt, 2005).
b. Retrospective – Sensemaking is described as a significant lived experience. Meaning is assigned after one sees what one has experienced.
c. Enactive of sensitive environment – Action is a prerequisite for sensemaking; individuals frequently do create part of their environment, and sequentially, the environment affects the individual's meaning making and actions (Giddens, 1979).
d. Social – Sensemaking is not created in isolation by an individual internally, since what a person does has implications for others. Moreover, collective action is a required experience in order to create and test meaning (Czarniawska-Joerges, 1992).
e. Ongoing – Sensemaking is an ongoing process which, as described by Weick, "neither starts fresh nor stops cleanly'' (1995, p.49).
f. Focused on and by extracted cues – The environmental setting, companies' vocabularies, search strategies and observation (Starbuck and Milliken, 1988) all influence the nature and importance of the extracted cues.
g. Driven by plausibility instead of accuracy – Sensemaking does depend on plausibility, practicality, coherence, sensibility, creation, invention and instrumentality instead of accuracy. Since sensemaking is retrospective, a manager deals with reconstructed insights that are modified by social, cognitive and emotional dynamics (Schwandt, 2005).

In Maitlis and Christianson's definition, fewer characteristics are considered crucial for sensemaking in comparison with Weick's definition. They describe sensemaking as:

> ''a process prompted by violated expectations, that involves attending to and bracketing cues in the environment, creating intersubjective meaning through cycles of interpretation and action, and thereby enacting a more ordered environment from which further cues can be drawn'' (2014, p.67).

While both aforementioned definitions are useful in describing sensemaking within organisations, they do not depict sensemaking on a personal level as in the case of an expatriate during his/her IA. A different interpretation of sensemaking adopted in this study is that of Louis, which is based on a newcomer's managing and making sense of his/her new experiences in order to adapt in the new environment. Louis describes sensemaking as:

> a recurring cycle comprised of a sequence of events occurring over time. The cycle begins as individuals form unconscious and conscious anticipations and assumptions, which serve as predictions about future events. Subsequently, individuals experience events that may be discrepant from predictions. Discrepant events, or surprises trigger a need for explanation, or post-diction, and, correspondingly, for a process through which interpretations of discrepancies are developed. Interpretation, or meaning, is attributed to surprises...it is crucial to note that meaning is assigned to surprise as an output of the sensemaking process, rather than arising concurrently with the perception or detection of differences. (1980, p.241)

In her seminal work, Louis's (1980) definition puts emphasis on the thinking procedure and the use of reflection to delineate surprises (Weick, 1995). For the purpose of my research, I use Louis' definition because it aids in the depiction of a SIE's journey during his/her adjustment period while on an IA. Given that sensemaking occurs within and between individuals (Maitlis and Christianson, 2014), this can apply to a SIE's newcomer entry experiences (Louis, 1980) in a new organisation and country. An example of such self-activity is Gioia and Chittipeddi's definition of sensemaking as: 'a process in which individuals develop cognitive maps of their environments' (1991, p.444). Furthermore, sensemaking has a social characteristic as it occurs in a social context of other actors (Weick et al., 2005). I consider Louis (1980) sensemaking process as the most relevant for my research.

### 3.5.3 Trigger Events within Intercultural Context

A trigger event has different meanings within various disciplines – e.g., chemistry, operations research, education, computer science, etc. (Osland et al., 2007). At an organisational level a trigger event is defined as an interference in a cognitive flow (Weick, 1995), whereas on an individual level a triggered event is defined as:

> cues – such as issues, events or situations – for which the meaning is ambiguous and/or outcomes uncertain. Such occurrences, when noticed, interrupt people's ongoing flow, disrupting their understanding of the world and creating uncertainty about how to act. This happens when there are discrepancies between expectations and reality - either an unexpected event ... or the non-occurrence of an expected event. (Maitlis and Christianson, 2014, pp.70)

In the case of managers working abroad, in new cultural contexts, trigger events "jerk people out of routines and force them to make sense of intercultural events they do not understand" (Osland and Bird, 2006, p.116). Trigger events are therefore interconnected with the intercultural context; for example, during interaction between people from various culture there is a high probability of misunderstanding due to disparities between the expected and the experienced (Osland et al., 2007).

Osland et al.'s (2007) work was concerned with trigger events characteristics within a multidisciplinary literature review. A first characteristic of trigger events is the deviation from expectations, as in Louis's (1980) definition of a surprise or discrepancy. Second, trigger events are interruptions to a stable situation that result in a new situation. Third, trigger events elicit change in trajectory or direction. Fourth, trigger events instigate preceding learned responses. Fifth, trigger events can be manifold. Sixth, trigger events can be accumulative and take one of two forms: as a perpetual cue (Billings et al. 1980), for instance, repeated complaints from a supplier that might lead to a corrective action; or in the form of multiple disparate cues in aggregation (Cowan, 1986), for example, in the case of an employee realising that he should start searching for a new job after noticing a sequence of events. And, lastly, trigger events can lead to change, deeper apprehension and higher awareness (Osland et al., 2007).

Trigger events were categorised in three types of situations in which people alter to conscious engagement, namely novelty, deliberate initiative and discrepancy (Louis and Sutton, 1991). Novelty alludes to circumstances that are distinctive and uncommon; discrepancy makes reference to cases in which assumptions vary from reality and are regarded as impediments or unpredicted fiasco; and deliberate initiatives refer to external and internal requests for a higher level of awareness, which takes place when people are ordered or questioned to think or be attentive. As aforementioned scholars delineated the importance of a trigger event within intercultural context, hence, for the purpose of this study, culturally trigger events will be considered as a necessary antecedent of intercultural sensemaking, which is delineated in the next section.

### 3.5.4 Intercultural Sensemaking as a Form of Sensemaking

There are various forms of sensemaking. Some are applications of sensemaking to a specific context (e.g., ecological or market sensemaking), while others are relevant to the nature of the cues or content of the sense made (e.g., intercultural, interpersonal, or prosocial sensemaking) (Maitlis and Christianson, 2014). Intercultural sensemaking is defined as "an ongoing process involving an iterative cycle of sequential events: framing the situation, making attributions, and selecting scripts, which are undergirded by constellations of cultural values and cultural history" (Osland et al., 2007, p.24). The process of intercultural sensemaking starts in framing the situation when a person identifies a context and consciously observes cues that provide information about the situation (Bird and Osland, 2005). In deciding what to take into consideration and what to ignore, an individual 'frames the situation' (ibid). The second step is making attributions. During this process cues are analysed in order to match the context with suitable schema. Conclusions are drawn regarding the people implicated, such as their intention and trustworthiness (ibid). The third phase, selecting a script, entails selecting a suitable schema or a cultural script that is a pattern of social interaction characteristic of a certain cultural group. Such cultural scripts and suitable ways of behaving are acknowledged, identifying certain patterns of interaction. Hence, we learn how to choose a cultural script from personal experience (ibid).

Intercultural sensemaking can lead to various outcomes, with gaining knowledge and learning being common outcomes (Osland et al., 2007). There are, nonetheless, other outcomes such as cue identification, pattern recognition, development of cognitive schema, increased awareness of trigger events, automatic responses to similar events, emotional earmarks and ascending re-stabilisation, which is a higher order of cultural understanding (ibid).

Efficient managers consciously work through the sensemaking activity every day (Bird and Osland, 2005). The main differences between local and global contexts are the expanded business complexity and extended cultural complexity associated with a global workplace (McCall and Hollenbeck, 2002). The sensemaking level would, therefore, be expected to be less accurate within the global context (Bird and Osland, 2005), particularly in cases of a lack of cultural overlap between the SIEs' cultural context and the host country's cultural context. Furthermore, managers faced with increased levels of business and cultural complexity have a wide range of signals and cues to pay attention to, and lack certainty with regards to interpretation, attribution and ambiguity in terms of deciding on relevant behavioural scripts (ibid). Accordingly, precise intercultural sensemaking is a vital component for efficient global leadership (Osland et al., 2007).

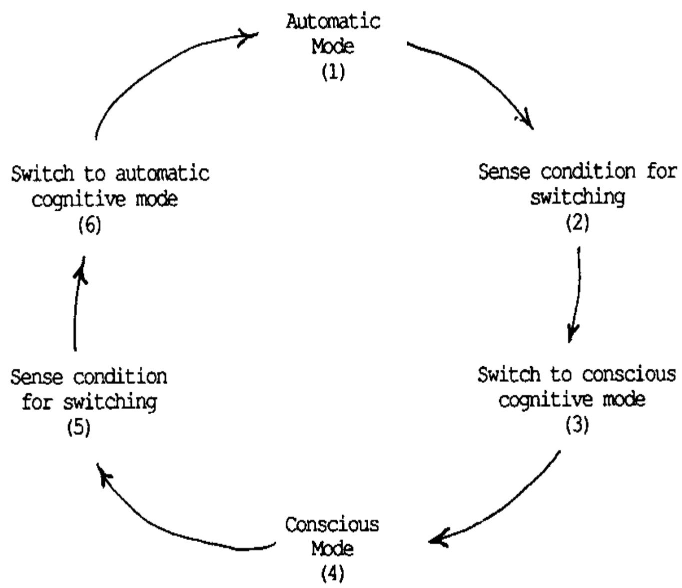
From among the various forms of sensemaking, the form of intercultural sensemaking is adopted in my study as it captures the challenges of SIE/manager/leaders' cross-cultural adjustment in diverse cultural contexts. In the next section I consider Louis and Sutton's (1991) view of switching cognitive gears when processing a cultural script as the final step in intercultural sensemaking.

### 3.5.5 Cultural Script Process

When processing a cultural script, an actor switches cognitive gears, that is the ability to switch between cognitive modes from an automatic procedure to conscious engagement, in other words from habits of mind to active thinking and back again (Louis and Sutton, 1991). As detailed in the cycle in cognitive processing below in figure 3.4, an individual's efficiency with regards to switching between cognitive modes depends on (1) operating in an automatic cognitive mode, (2) recognising when dependence on habits of mind is unsuitable, (3) shifting from automatic to conscious cognitive mode, (4) operating in a conscious cognitive mode, (5) identifying when active thinking is no longer required, and (6) shifting from cognitive to automatic cognitive mode (Louis and Sutton, 1991). As noted by Griffith (1999), the aforesaid cycle in cognitive processing was not empirically tested by the two scholars. For the purpose of this study, the cycle in cognitive processing will be part of my theoretical framework which will be empirically tested.

The next section considers the two constructs relating to sensemaking, namely sensebreaking and sensegiving, as both constructs are intertwined with the sensemaking perspective.

**Figure 3.4: The Cycle in Cognitive Processing**




(Source: Louis and Sutton, 1991)

### 3.5.6 Sensebreaking and Sensegiving Constructs

While in recent years there has been a rapid increase of sensemaking-interconnected constructs, two have made a noteworthy contribution to our knowledge of how sensemaking is achieved (Maitlis and Christianson, 2013). The first construct is 'sensegiving', defined as "the process of attempting to influence the sensemaking and meaning construction of others toward a preferred redefinition of organizational reality" (Gioia and Chittipeddi, 1991, p.442). Sensegiving is often researched within the context of how leaders or managers strategically form the sensemaking of members within a firm using symbols, images and other influence methods (Gioia and Chittipeddi, 1991; Maitlis and Lawrence, 2007; Rouleau, 2005).

The second construct, ‘sensebreaking’, is defined as ‘the destruction or breaking down of meaning...it involves a fundamental questioning of who one is when one’s sense of self is challenged’ (Pratt, 2000, p.464). Although sensebreaking is less researched, it grasps a critical part of activities encompassing sensemaking and sensegiving (Maitlis and Christianson, 2014). Moreover, sensebreaking could be a motivation for individuals to reflect upon their made sense, to examine their underlying beliefs, and to examine further their course of action (Lawrence and Maitlis, 2005). Sensebreaking is frequently a preliminary phase to sensegiving, in which leaders or firms fill the meaning gap shaped through sensebreaking with new meaning (Pratt, 2000). Both sensebreaking and sensegiving have essentially been considered as activities conducted by managers or leaders (Mantere et al., 2012; Pratt, 2000). For the purpose of my study, both constructs will be used as part of the intercultural sensemaking. The integration of all three theories will be discussed later in this chapter. In the next section criticism of sensemaking is considered.

### 3.5.7 Sensemaking Perspective Critiques

There are several critiques addressed to sensemaking theory. One criticism according to Sandberg and Tsoukas (2015) is the relative vagueness of the actual process of sensemaking (e.g., Decker, 1998; Gioia and Mehra, 1996; Hong-Sang and Brower, 2008; Magala, 1997; Mills and Weatherbee, 2006; O’Connell, 1998). Sandberg and Tsoukas (2015) argue that although such criticism lacks accuracy regarding the aspects of processes that generate confusion, it does point in the right direction. The reason for such criticism according to Sandberg and Tsoukas (2015) stems from the fact that both ‘creation’ and ‘interpretation’ processes are combined in sensemaking research, although Weick (1995) claims to the contrary that sensemaking is not synonymous with interpretation. Moreover, such criticism is not valid concerning intercultural sensemaking given the three specific steps that follow a trigger event delineated earlier: framing the situation, making attributions and choosing a script.

Another criticism is that sensemaking theory is a self-fulfilling prophecy. Individuals are simply creating the implication they aspire to despite the environment, then they act and believe as if the world were like that all along (Miles, 2012).

Moreover, enactment as a conception signifies that constraints are to a certain extent the result of an individual's own actions (Weick et al., 2005). Furthermore, individuals are not capable of being neutral, objective and isolated witnesses of events. Rather, they are biased witnesses who alter their situation by their attendance. Individuals take part only in the events and cues that would reinforce the results they created deliberately (Miles, 2012). I would partly agree with this criticism in the case of intercultural sensemaking, but a SIE is capable of being objective and refraining from being a biased witness when he/she selects a cultural script that suits the current situation.

Critics have also claimed that sensemaking does not deal with reality but only with plausible or reasonable meaning, possibly with no relationship to reality. Individuals create stories that are sensible but not sensable, thus, not perceived by their five senses. Consequently, managers should focus on reality instead of most likely or possible explanations for events (Miles, 2012). Such criticism is not sustainable in the case of intercultural sensemaking as a SIE manager on an IA would confront real cases of false impressions, tensions and challenging situations due to a dissonance between the expected and experienced situation.

A final criticism to sensemaking is that it is retrospective and not forward thinking. Change and ambiguity are observed, then reasonable sense is made of those events, then individuals move on (Weick, 2001). But retrospective clarifications are helpful in order to settle tension conditions by reinstating equilibrium (Louis, 1980). Moreover, critical incident technique used in interviews with SIEs is characterised as retrospective, which enables subjects to reflect on their learning and development through past experiences.

The next section investigates impression management theory, then IM within firms is examined and cross-cultural IM is reviewed. Finally, the critique of IM theory in the literature is considered.

## 3.6 Impression Management Theory

Dramaturgy is seen as the study of how human beings achieve meanings in their lives (Brissett and Edgley, 2009). According to Geertz dramaturgy, as with other types of interpretive explanation, is resolved around ‘’connecting action to its sense rather than behavior to its determinants'' (1983, p.34). In addition, the dramaturgical principle becomes more evident through the study of how human beings fulfil significant lives (Brissett and Edgley, 2009). The dramaturgical interest resides in how individuals accomplish their actions rather than in the action itself, the intentions behind the action or the reasoning for the action (ibid).

Erving Goffman is considered to be the godfather of dramaturgy (Brissett and Edgley, 2009). His seminal work, 'The Presentation of Everyday Life', is based on his ability to observe others and make sense of these observations (Sannicolas, 1997). Goffman's theory of impression management (IM) was developed from anthropological fieldwork through the exploration of social interaction in a small rural community in the Shetland Isles (Lewin and Reeves, 2011). His data suggested that when individuals presented themselves to others, they made use of verbal and nonverbal communications (ibid). In addition, Goffman pinpointed that individuals overemphasise communicative signals that strengthen their desired self and underemphasise communicative gestures that diminish their desired self (ibid). Hence, according to Lewin and Reeves (2011), the way in which impressions of self are managed by individuals in an active way during social interactions would be described as impression management (IM).

Goffman (1959) applied the drama metaphor to behaviour (Grove and Fisk, 1992). The activity of presenting oneself is viewed as a performance which is undertaken in two separate areas, the public front region and the private back region (Lewin and Reeves, 2011). Goffman contends that front region presentations are formal and controlled, whereas back region presentations are more casual, which permits an individual to feel more relaxed and step out of their front region personality (ibid). The usefulness of both regions is summarised as follows: ''There is a back 'region' where the show is prepared and we rehearse our parts; and a 'front region' where the performance is presented to an audience'' (Joseph, 1990, p.316). The next section considers the literature of IM theory within organisations.

### 3.6.1 Impression Management in Organisations

Impression management is a significant organisational phenomenon because of the breadth of its ramifications for organisations and individuals (Bolino et al., 2008). There is, however, a debate within the literature regarding the scope of IM (Schlenker and Weigold, 1992). One group of scholars have restricted views, usually linking IM with a narrow set of motives (e.g., approval or personal gain) and frequently hinting that IM entails fraud or deceit (Gardner and Avolio, 1998), while another group of scholars, examining IM according to a broader view, that is IM as a universal element of social behaviour (Schlenker, 1985), reject this notion of IM's intrinsic superficiality and deception. Although the focus in my study is on the broader view of IM, I also explore SIEs involvement in cases of deception.

Within the field of organisational studies, the theatrical metaphor has been used as a lens to examine organisational life (Boje et al., 2003). One perspective is "organising-is-like-theatre'' which was developed most notably in Goffman's work (ibid). Within this perspective organisational members are actors who take part in various formal and casual performances (Morgan, 1980). Giacalone (1989) defined IM as the tendency to present oneself in socially desirable ways to others – especially others in authority. Bolino et al. defined IM as "behaviours that employees (commonly referred to as actors) use to shape how they are seen by others (commonly referred to as targets – who are typically supervisors and co-workers, but sometimes subordinates and customers) at work" (2016, p.378).

IM is now acknowledged as a common occurrence in organisational settings (Bolino and Turnley (1999). Moreover, according to Bolino and Turnley scholars have lately started to empirically investigate IM behaviours within diverse organisational contexts, including feedback seeking (e.g., Ashford and Northcraft, 1992), performance appraisal (e.g., Ferris et al., 1994; Wayne and Ferris, 1990), interviewing (e.g., Kacmar et al., 1992; Stevens and Kristof, 1995), leadership (Wayne and Green, 1993), and careers (Judge and Bretz, 1994). Guadagno and Cialdini (2007) state that within the literature individuals used numerous ways to reveal their IM objectives, for example, a person appears agreeable by using the following tactics: compliments and ingratiation (e.g., Gordon, 1996; Jones and Wortman, 1973), highlighting similarity (e.g., Berscheid and Walster, 1978; Cialdini, 2001), physical attractiveness (e.g., Eagly et al., 1991), and projecting humility (e.g., Wosinska et al., 1996). In addition, a person appears capable by engaging in activities designed to project capability: self-promotion (e.g., Arkin and Shepperd, 1989), staging performances to appear capable (e.g., Goffman, 1959), making excuses for failures (e.g., Giacalone and Riordan, 1990), and claiming obstacles to success (e.g., Shepperd and Arkin, 1989). Furthermore, a person expresses status by exhibiting artifacts of power through their attire and accessories (e.g., Mast and Hall, 2004), engaging in conspicuous consumption (e.g., Fussell, 1983), associating with powerful people (e.g., Cialdini et al., 1976), and communicating dominance non-verbally (DePaulo, 1992). But, according to Bolino et al. (2016), the two types of IM that have been most studied are the use of self-promotion and ingratiation within the context of job interviews and performance evaluations (e.g., Ferris et al. 1994; Stevens and Kristof, 1995; Wayne and Ferris 1990; Wayne and Kacmar, 1991; Wayne and Liden, 1995; Swider et al., 2011). Conversely, fewer studies have paid attention on the use of defensive impression management behaviours such as excuses, accounts, justifications, apologies (ibid).

Leadership researchers have frequently examined the significance of IM procedures for charismatic leadership, regularly referring to this procedure as image building. Gardner and Avolio's (1998) seminal work advanced the relevance of the dramaturgical perspective to the study of charismatic leadership (Sinha, 2010). Leaders strive for approval, acceptance, and, at times, recognition, hence they become involved in self-monitoring behaviours during social interactions (Couto, 2010). Consequently, leaders acquire causal attributions or schemata about how diverse audiences act in response to specific IM strategies and tactics (Gardner and Martinko, 1988). Individuals create and adjust their self-image or self-presentations to secure desired responses; as a result, individuals have the potential to assess how far their real public behaviours are from where they could be – the ideal (Burke, 1950). Self-monitoring may equip charismatic leaders to use a range of IM strategies to convey and maintain appropriate self-images, namely, (a) exemplification behaviours to introduce oneself as a good role model, (b) ingratiation behaviours to make oneself more attractive or pleasant to others, (c) self-promotion behaviours to introduce oneself as highly capable regarding certain competencies or abilities, (d) intimidation behaviours to introduce oneself as a dangerous and dominant person who is capable of and willing to challenge others, and (e) supplication behaviours to introduce oneself as vulnerable with the intention of requesting aid from others (Sosik et al., 2002).

In its exploration of SIEs self-monitoring cases, my study examines both the broader sense of IM as social interactions and the narrower sense as pursuing specific motives such as approval via deceit. The next section considers the relationship between IM and cross-cultural adjustment.

### 3.6.2 Cross-Cultural Impression Management

The majority of studies on IM have been conducted in the USA and have been based on assumptions and theories that display how IM tactics are likely to work in Western cultures (Sandal et al., 2014). Studies contrasting the use of IM across countries have been rare, proceeding in a scattered and fragmented manner (Bye et al., 2011), and little research has been conducted on how cultural values impact the use and interpretation of IM (Bolino et al., 2016). As the majority of existing studies have used students as samples (ibid), an exploration of IM amongst employed individuals globally is therefore significant. Additionally, most previous studies have put emphasis on individual differences that are mainly significant in the USA, hence the need for more research that is applicable in other parts of the world (ibid). The results of the few studies conducted regarding IM on a global scale outside the USA have been mixed. For instance, the results of Montagliani and Giacalone's (1998) study suggest that successful adjustment in the host country was linked to IM capabilities, whereas in Foldes et al. (2006), IM scale scores were not correlated to either adjustment or job performance.

The capability to adjust cross-culturally to specific cultural contexts in foreign countries seems to be a culminating point for a successful IA (Montagliani, 1996). The capacity to use IM efficiently is therefore extremely significant for expatriates, as it is essential for them to adjust to the parent firm expectations concerning their behaviour (Mendenhall and Wiley, 1994). An expatriate manager needs to perform not only the challenging interpersonal interactions in the parent firm, but also has to deal with delicate interpersonal interactions with host country national colleagues (Foldes et al., 2006). In order to manage impressions, individuals use communication in a strategic and deliberate way to create desired impressions of themselves (Johansson, 2007). As a result, communications skills play a crucial role in the successful adjustment of an expatriate (Montagliani and Giacalone, 1998). The use of effective communication competencies such as listening, controlling verbal and non-verbal cues and feedback contribute to culturally suitable behaviour and adaptation to the host country culture (Montagliani, 1996). My study explores how SIEs use these skills in order to manage their impressions towards their colleagues, clients and bosses and adjust to the new cultural context in GCC countries. The next section examines the criticism towards Goffman's theory and my responses to that criticism.

### 3.6.3 Critique of Impression Management Theory

Erving Goffman was considered both an influential and controversial scholar within the discipline of sociology (Johansson, 2007). Several critiques of Goffman's theory and to the dramaturgy perspective in general have appeared. A first criticism is that dramaturgy is not an appropriate theory concerning human behaviour as it does not include the characteristics of a formal theory and does not produce testable hypotheses (Brissett and Edgley, 2009). It cannot, therefore, be considered a theory as it does not induce "interrelated propositions joining variables implied by a conceptual scheme'' (Stryker, 1987, p.603). A response to the criticism of Goffman's theory characteristics and methodology is that his work should be conceived as an alternative theory to influential post-war sociology, as for example Talcott Parson's grand theories and quantitative research, hence the difficulty in categorising Goffman's work (Best, 2008). This was the case because, firstly, his methodologies were unusual as he did not use only examples from his field work but also from a wide variety of written references such as novels, academic texts and newspaper extracts (Manning, 1992), and, secondly, his work could not be classified within the widely known categories of social psychology (Best, 2008). In essence, this critique of Goffman's work might stem from the difficulty encountered within sociology in combining theoretical to practical work (Manning, 1992). Manning argues that Goffman was not only an empiricist, his work was also conceptually advanced.

A second criticism of dramaturgy by several critics who do consider it to be a theory is that it has no universal implications regarding human behaviour (Brissett and Edgley, 2009). This critique is based on the fact that dramaturgy is not considered an explanatory theory (Mitchell, 1978). According to these critics, dramaturgy is an artifact of situational behaviour studies within Western culture (Brissett and Edgely, 2009) and is not generalisable to different contexts and hence not appropriate to other cultures, times or places (ibid). But Goffman contends that "when the individual presents himself before others, his performance will tend to incorporate and exemplify the officially accredited values of the society'' (1959, p.45). In other words, as proper behaviour differs between various cultures, our ability to display a flexible diversity of behaviours is vital to generating favourable impressions and developing efficient relationships with individuals in a multicultural environment (Gudykunst et al., 1988). For example, in Middle Eastern societies, one of the basic values within Arab culture is to behave in such a way as to make a good impression on others (Nydell, 2018). Furthermore, in Eastern societies social status is considered the foundation for the Confucian system of social order (Lin, 1936). The objective of facework is to increase standing in relevant social groups through shaping members' impressions (Begley and Tan, 2001), and, thus, 'saving face' in the Chinese social code is crucial to avoiding embarrassment. Goffman (1967) argued that saving one's face is applicable to Anglo-American societies as well some other societies. Therefore, IM situational behaviour is not confined to Western culture, but would have global implications.

A final criticism of Goffman's theory is the trivial influence of larger social units such as organised institutions on human behaviour (Brissett and Edgely, 2009). In fact, Goffman fails to include economic, political, religious, cultural and general social organization as well as specific organisations in his writings (Burns, 1992). But as Best (2008) argues, this is due to his distinctive subject matter; he was considered a minimalist, working on a small scale and focussing on quotidian social interactions in everyday life.

In conclusion, theatrical metaphors are useful since it is partly true that we do play roles, mystify our performances, participate in team behaviour, differentiate spatially between front and back stages and in general we exhibit considerable aptitude at IM (Manning, 1992). Metaphors can both enlighten and conceal facets of our behaviour, depending on whether we use them as a constraint or as a springboard for theorising (ibid). I would agree with Manning's opinion regarding the merits of using IM as a metaphor within organisations. Moreover, the use of IM for a SIE within a foreign cultural context should be challenging given the ambiguity and uncertainty of such a conservative environment as the GCC countries. But if the SIE successfully navigates these challenges by managing appropriately his/her impressions, that would potentially lead to cross-cultural adjustment. My thesis explores how SIEs reflected in the back region and used communication skills in the front region to manage their impressions in order to adjust to a new cultural context. The next section reviews the integration perspective of the three theories discussed which frame the data collection and empirical analysis.

## 3.7 Integration Approach of Theories

To inform my main research question on how SIEs learn and develop GLC through their international work assignments, this study integrates three streams of research from management and organisational behaviour, social psychology, organisational psychology, namely ELT (Kolb, 1984), sensemaking theory (Weick, 1995) and impression management (Goffman, 1959). The integration of ELT and sensemaking is now discussed.

### 3.7.1 Integrating ELT and Sensemaking

Although the sensemaking construct and adult learning have their roots in different disciplines, a relationship exists between reflective learning and managerial sensemaking (Schwandt, 2005). Indeed, both theories recognise the capability of adults to have significant experiences and interpretive skills that enable them to make sense during their interactions in ambiguous social environments (Schwandt, 2005). This would be the case for a SIE manager during his/her working experience on an IA while reflecting and making cross-cultural sense of daily challenges confronted as a leader of an organization. As stated by Pye, "to understand leadership as a sensemaking process helps illustrate more clearly what happens in the daily doing of leading" (2005, p.31). In addition, Parry (2008) asserts that the work of other scholars (e.g., Weick, 1995; Pye, 2005) demonstrates that the crux of leadership lies in sensemaking, that is leaders in their roles make sense of the circumstances they are confronting, which assists them in conveying that sense to employees. As a consequence of this sensegiving, employees are in a position to perform better and adjust to their experienced leadership. Humphreys et al. (2012) affirm that several researchers consider sensemaking and sensegiving as key elements of the leadership procedure (e.g., Colville and Murphy, 2006; Maitlis and Lawrence, 2007; Pye, 2005; Smircich and Morgan, 1982; Smircich and Stubbart, 1985).

Critical incidents are one form of experiential learning (Lewis and Williams, 1994). When a SIE encounters a challenging critical incident, he/she has as a learner to go through a learning procedure of four bases, namely experiencing, reflecting, thinking and acting in order to transform experience into successful learning (Ng et al., 2009). When ‘experiencing’ such a cross-cultural trigger event, the SIE is still behaving in an ‘automatic mode’ (Louis and Sutton, 1991) as he/she would have back home. During the second cycle of experiential learning, the SIE will be ‘reflecting’ on the reasons for such discrepancy by using sensemaking strategies to gather and analyse information. The SIE at this stage is ‘sensing a condition for switching’ his/her behaviour (Louis and Sutton (1991). Throughout the third cycle of experiential learning, the SIE is ‘thinking’ about the new behaviour that should be adopted within the new cross-cultural environment. That means ‘sensebreaking’ (Pratt, 2000) with old habits and ‘switching to a conscious cognitive mode’ (Louis and Sutton, 1991) of new meanings and interpretations that suits the host country cultural context. Lastly, during the fourth cycle the SIE leader is ‘acting’ by displaying the new behaviour towards employees, bosses and clients. Sensegiving (Gioia and Chittipeddi, 1991) in this case is achieved by being in a ‘conscious mode’ (Louis and Sutton, 1991) when displaying the new behaviour. According to Humphreys (2011), both sensemaking and sensegiving are triggered in a wide scope of contexts, especially when matters are considered important to leaders and in environments characterized by complexity and unpredictability (Weick et al., 2005; Maitlis and Lawrence, 2007), as is the case for SIEs during an IA in the context of the GCC countries. All in all, there is a consensus in the literature regarding the integration of ELT and sensemaking, and this approach will potentially yield novel results on SIEs’ sensemaking and learning from new challenging experiences in the GCC countries.

### 3.7.2 Integrating Sensemaking and IM

From the literature review it appears that there is no dialogue between sensemaking and IM, hence, relationships between sensemaking and impression management have not been investigated (Brown and Jones, 2000). However, given that cross-cultural sensemaking (Osland et al., 2007; Bird and Osland, 2006) relies on schemas or scripted dialogue and behaviour, cross-cultural sensemaking and IM are intertwined through theatrical metaphors. With regard to IM, an actor has to control his/her performance on the front stage and reflect and prepare on the back region. Within expatriation literature, such a relationship between both theories takes the following form:

> The process of expatriation involves a change in identity and role, and having to develop new ways of presenting oneself, and so, a way of reconstructing the actor's identity is an important part of functioning in the new environment. Thus, in a situation like those faced by expatriates and other sojourners, it would stand to reason that strategic self-presentation forms a part of their adjustment to the new situation of changed event sequences and changed sensemaking norms of what happened and what is supposed to happen. (Lowe et al., 2011, p.34)

When a SIE/actor is confronted with a critical incident due to the selection of an inadequate cultural script, he/she has to frame the situation by making sense cross-culturally of the reasons for such a discrepancy. Such reflection will take place in the back region (at home or personal office) by using sensemaking strategies. The next step for the SIE/actor is to make attributions by analysing the cues before selecting the right cultural script, as the next step, in order to adjust his/her performance in the front region through the enactment process towards the audience (employees, bosses, clients).

These two theories have more characteristics in common. For example, the grounded identity construction property is described by Weick (1995) as a 'parliament of selves', an individual being constructed by adapting between the different selves. In a similar vein, within impression management a skilful performer has a range of selves (Bissett and Edgley, 2009) as described by MacClintock (1951): "No human being is the same at all times, but changes from moment to moment, from place to place, according to the contact he makes with his fellowmen'' (in Baumann, 1967, p. 595). In addition, an individual is presented in Goffman's work as: ''a series of selves, one inside the other, after the fashion of a Chinese box, or a Russian doll'' (Burns, 1992, p.107). This could be said of a self-initiated expatriate who has more than one self (local and international). Thus, when faced with incongruity between expectation and reality in the host country, a SIE will be competent in dealing with cultural paradoxes based on his multiple cultural identities (Osland and Bird, 2000).

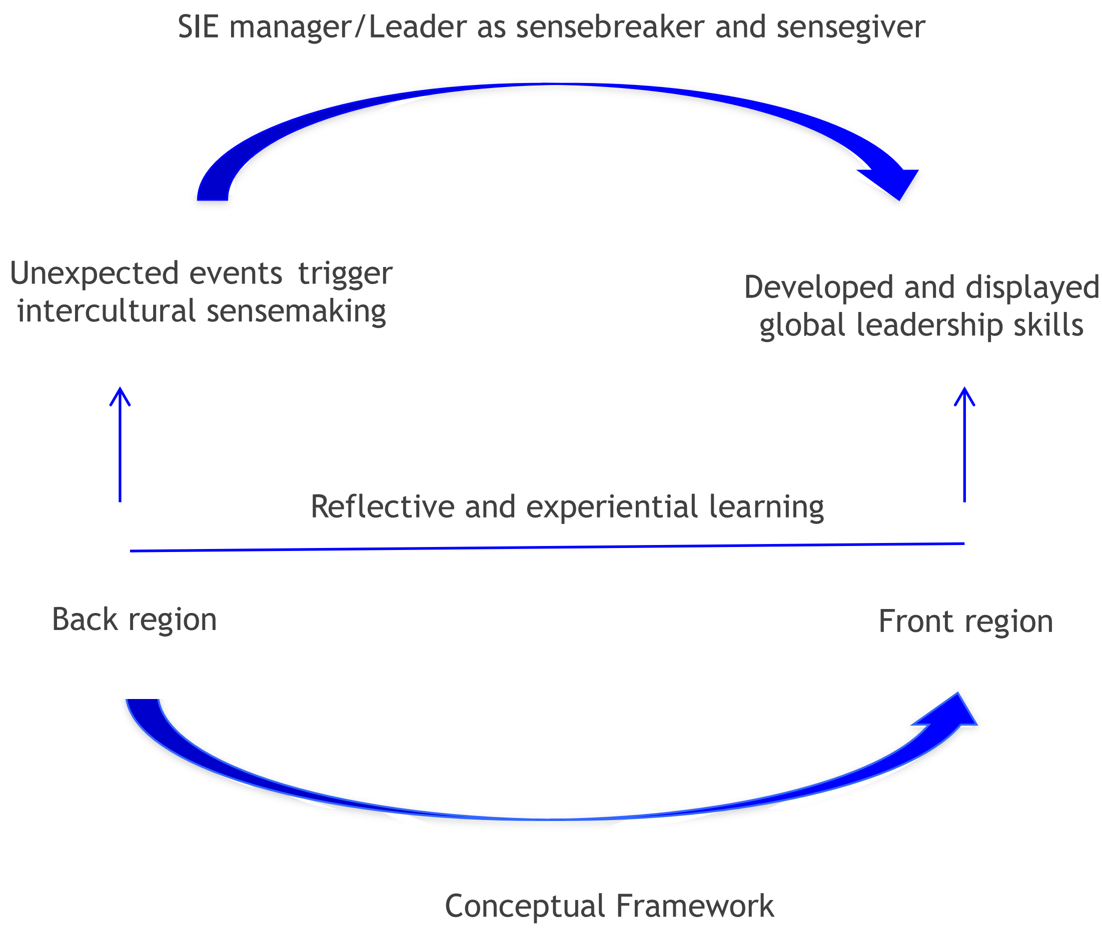
Secondly, sensemaking is described as retrospective since: "actions are known only when they have been completed'' (Weick, 1995, p. 26). Moreover, the dramaturgical self in Goffman's perspective is altered through a 'retrospective act' (Mead, 2015) by "looking back on who and what we were at a given time in the past...as an illuminating experience'' (Brissett and Edgley, 2009, p. 21). Thirdly, both perspectives rely on action (Weick, 1995; Brissett and Edgley, 2009). Within the sensemaking perspective, individuals are often causing the part of the environment they encounter (Pondy and Mitroff, 1979). Thus, they act and by doing so they shape the materials that would become the limitations and opportunities they confront (Weick, 1995). In a similar manner, IM involves roles which are played (Mead, 2015) or enacted (Sarbin, 1977) by performers.

### 3.7.3 Integrating ELT and IM

Although ELT and IM are not linked in the literature, a relationship exists between these two theories within expatriation regarding the learning and development of GLC in order to achieve cross-cultural adjustment while working in a foreign country. An important feature of Goffman's IM perspective is the distinction between the front region and the back region activity of every performance. The front region alludes to that part of the SIE/actor performance which is visible and at which the audience/employees are present, whereas at the back region the audience/employees are excluded, allowing the SIE/leader/performer: "to relax; he can drop his front, forgo speaking his lines, and step out of character'' (Goffman, 1959, p.115). According to Burns, this allows for: "some time and space for the preparation of procedures, disguises or materials essential to the performance, or the concealment of aspects of the performance which might either discredit it or be somehow discordant with it'' (1992, p.112). This is evident for a SIE/ leader who faces an ambiguous cultural context, has to make sense of discrepancies, find solutions and adequate actions but also avoid embarrassment and *faux pas*. Thus, the back region would be suitable on an individual or social level for reflection and thinking.

Since cultures differ in their social norms for appropriate behaviours, the ability to display a flexible range of behaviours or adaptive behaviours is critical to creating positive impressions and developing effective intercultural relationships with other actors in the culturally diverse environment (Gudykunst et al.,1988). When individuals are flexible, they are less offensive to others, more likely to fit in and better adjust. Research has linked behavioural flexibility to various intercultural outcomes (Ramalu et al., 2010). Black (1990) found that behavioural flexibility correlated with general, interaction, and work adjustments in a sample of Japanese expatriates working in the USA. Another study found that flexibility predicted both general and work adjustment in expatriate managers working in a variety of countries (Shaffer et al., 2006). Hence, during the experiential learning cycle the SIE exhibits cross-cultural flexibility and as aforesaid communications skills discussed here while self-monitoring his/her performance to cross-culturally adapt the performance to suit the host country cultural context. Figure 3.5 below brings together a preliminary theoretical insight of the integrated three theories which acts as sensitising constructs for my research data collection and analysis (Blumer, 1954).

**Figure 3.5: Conceptual Framework**




## 3.8 Conclusion

This chapter has given an overview of the three theories that were blended to develop the conceptual framework for this study, namely ELT, sensemaking and IM. Together, they developed an argument on the mechanisms the SIEs used to learn and develop GLC and ultimately achieve cross-cultural adjustment within the GCC countries. This opened up a window of opportunity for a more in-depth examination of the relationship between international assignment working experience and learning and developing GLC by focusing on the experiential learning lens within the theoretical framework of this thesis. This conceptual argument forms the basis for empirically investigating and analysing SIEs' experiential learning cycle and cross-cultural adaptation during IAs in the GCC countries. The next chapter will look at the main research design used for this thesis.

# CHAPTER 4

# Research Methodology

## 4.1 Introduction

The purpose of this phenomenological qualitative study is to explore the link between SIEs' learning from experience during their international assignments and the development of global leadership competencies within the context of the GCC countries. In order to investigate this issue, I focus on critical incidents faced by SIEs during their work experience in the GCC countries. The qualitative research method described below was chosen because it is best suited to capturing the individual's perceptions of the personal impact of working abroad experience on learning and developing global leadership skills. As a matter of fact, Grint (2000) challenged the positivistic stance of other leadership studies, arguing that efficient leadership depends on managing subjective significations. Moreover, he claimed that the leadership concept can be researched only by comprehending the significance of the concept to the participants of this form of social action (ibid).

In this chapter, an overview of the research design is provided. Next, the data collection method is presented. This is followed by an outline of how data were analysed.

## 4.2 Research Design

A research design provides a structure for collecting and analysing the data (Bryman and Bell, 2003). The selection of a research design reveals the decisions regarding priority in view of a range of dimensions of the research procedure (ibid). In my study, the investigation adopts an inductive approach that uses qualitative semi-structured interviews with thirty SIE managers working in private and public companies within various sectors in the Kingdom of Saudi Arabia (KSA), Qatar, the UAE, Kuwait and Bahrain. I will now discuss my research design strategy, namely qualitative methodology, then inductive reasoning as my positioning of theory within research. Finally, interpretivism will be presented as my epistemological orientation, followed by phenomenology as one of the alternative forms of interpretivism.

### 4.2.1 Qualitative Research

Quantitative and qualitative research are viewed as having dissimilar epistemological underpinnings (Bryman and Bell, 2011). Qualitative research puts emphasis on words and the individual's interpretation of their social world and follows an inductive process to generate theory, with social reality subjectively constructed by the individuals (ibid). Whereas quantitative research stresses quantification in collecting and analysing the data, placing emphasis on natural science and a positivistic stance and follows a deductive approach to test theory, viewing social reality as objective and external (ibid), qualitative research is defined by Denzin and Lincoln (2011, p.19) as:

> a situated activity that locates the observer in the world. Qualitative research consists of interpretive, material practices that make the world visible. These practices transform the world. They turn the world into a series of representations, including field notes, interviews, conversations, photographs, recordings, and memos to the self. At this level, qualitative research involves an interpretive, naturalistic approach to the world. This means that qualitative researchers study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meaning people bring to them.

Qualitative research methodology was deemed appropriate in my study in order to explore the subjects' challenging experiences and learning as SIEs in the GCC countries. Moreover, qualitative research with regards to leadership tends to pay more attention to the ways in which leaders and styles of leadership must be or tend to be receptive to particular circumstances (Bryman, 2004). In determining leadership styles and what is considered to be more or less successful, qualitative researchers are more likely to put emphasis on the importance of the sector within which leadership takes place (ibid). Table 4.1 outlines the key differences between qualitative and quantitative research. I will now consider deductive and inductive reasoning.

### Table 4.1: Characteristics of Qualitative and Quantitative Research

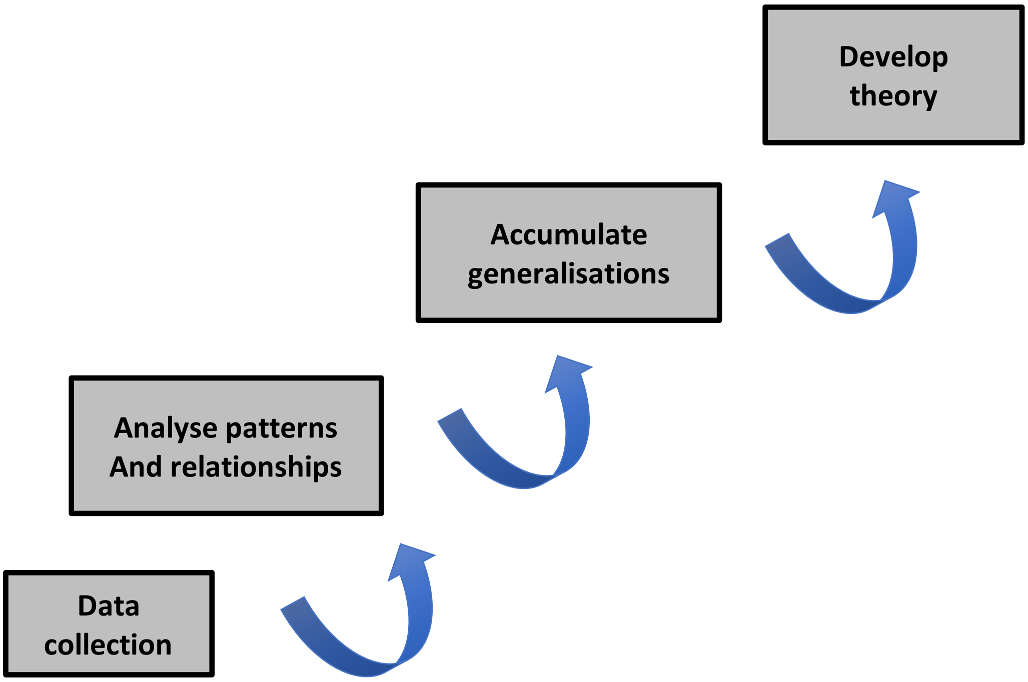
| Point of comparison | Qualitative Research | Quantitative Research |
|---|---|---|
| ***Focus of research*** | Quality (nature, essence) | Quantity (how much, how many) |
| ***Philosophical roots*** | Phenomenology, symbolic interactionism, constructivism | Positivism, logical empiricism, statistical |
| ***Associated phrases*** | Fieldwork, ethnographic, naturalistic, grounded, constructivist | Experimental, empirical, statistical |
| ***Goal of investigation*** | Understanding, description, discovery, meaning, hypothesis generating | Prediction, control, description, confirmation, hypothesis testing |
| ***Design characteristics*** | Flexible, evolving, emergent | Predetermined, structured |
| ***Sample*** | Small, nonrandom, purposeful, theoretical | Large, random, representative |
| ***Data collection*** | Researcher as primary instrument, interviews, observations, documents | Inanimate instruments (scales, tests, surveys, questionnaires, computers) |
| ***Primary mode of analysis*** | Inductive, constant, comparative method | Deductive, statistical |
| ***Findings*** | Comprehensive, holistic, expansive, richly descriptive | Precise, numerical |

(Source: Merriam, 2009)

### 4.2.2 Inductive Reasoning

The research approach selected is linked to a researcher following either a deductive or inductive theory process. A deductive approach develops a theory and hypothesis and then designs a research strategy to test the assumptions, whereas an inductive approach collects data and develops theory as a result of data analysis (Saunders et al., 2002). I have adopted an inductive reasoning approach because of the explorative nature of my study. Three sensitising concepts formed the conceptual framework used in this study. The use of sensitising concepts provide a starting point to build inductive analysis (Bowen, 2006). According to Creswell (2013, ch.3, para.10): “qualitative researchers build their patterns, categories, and themes from the ‘bottom up’, by organising the data inductively into increasingly more abstract units of information”. These patterns then become generalisations, and the accumulated generalisations become theories (Blaikie, 2000). Figure 4.1 delineates the inductive reasoning approach used in my study.

**Figure 4.1 Inductive Reasoning Process**




(Source: Blaikie, 2000)

### 4.2.3 Philosophical Assumptions: Interpretivism

Auguste Comte (1798–1857) is considered to have coined the term positivism, but most probably he just popularised the word (Crotty, 1998). As an epistemological orientation positivism favors applying natural sciences *modus operandi* in research (Bryman and Bell, 2011). According to Rosenberg (2012), positivists state that "our knowledge of the world can be justified only by the testimony of the senses - that is, by experience, observation and experiment" (ch.4, para.15). Hence, positivism is founded on the viewpoint of an external reality that can be studied in an objective way (Schurink, 2011) by testing theories and providing data to develop new laws (Bryman and Bell, 2011).

Interpretivism is, however, based on the belief that there are fundamental differences between the social sciences and the natural sciences (Schurink, 2011). Thus, the methodology used should be one that "respects the differences between people and the objects of the natural sciences and therefore requires the social scientist to grasp the subjective meaning of social action" (Bryman and Bell, 2011, p.17). Hence, "reality should be interpreted through the meaning that research participants give to their life world. This meaning could only be discovered through language" (Schurink, 2011, p.23).

Achieving the current research objective of exploring how SIE managers learn and develop global leadership competencies while working in the GCC countries will require the subjects' interpretation of the various critical incidents. Thus, interpretivism as a research philosophy is well suited to my study. Table 4.2 below summarises the key contrasting general orientation of qualitative and quantitative research.

**Table 4.2: Basic Strategies in Qualitative and Quantitative Research**

| | Qualitative | Quantitative |
|---|---|---|
| ***Positioning of theory within research*** | Inductive | Deductive |
| ***Epistemological positioning*** | Interpretivism | Positivism |
| ***Ontological positioning*** | Constructionism | Objectivism |

(Source: Bryman and Bell, 2011)

#### 4.2.3.1 Phenomenological Approach to this Study

Interpretivism has many variants, among which is phenomenology which I will use in my study as a research strategy. Phenomenology has been influenced by the philosophical ideas of Alfred Schutz and Edmund Husserl and by Weber's concept of "Verstehen" (Bryman and Bell, 2011), which put emphasis on the interpretation of human interaction (Schurink, 2011). Van Manen et al., (2010, p.449) define phenomenology as "the study of lived or experiential meaning and attempts to describe and interpret these meanings in the ways that they emerge and are shaped by consciousness, language, our cognitive and noncognitive sensibilities, the ontics of meaning, and our personal, social and cultural preunderstandings". As reported by Moustakas (1994), when a researcher uses phenomenology, experiences are condensed to a key interpretation or the substance of the experience.

Researchers using phenomenology as a research strategy utilise interviewing among various other methods of data collection, which will be discussed in the next section.

## 4.3 Data Collection

Semi-structured critical incident interviews via skype were used as the primary source of data collection. More specifically, thirty Skype interviews were conducted between June 2015 to May 2016. This section begins with an outline of the unit of analysis in this study. An overview of the subjects and the selection criteria and sampling process is then followed by a detailed discussion of using critical incident interviews and the use of Skype in data collection.

### 4.3.1 Interview Guide

An interview guide is “a script, which structures the course of the interview more or less tightly” (Brikmann and Kvale, 2015, p.156). In my study the interview was semi structured, hence I had a list of the questions with topics to be covered, but still had flexibility with each subject. That is, the interview questions did not follow the exact script as outlined in the guide. Moreover, in some interviews some questions were asked that were not in the guide. That was the case, for example, when a subject had more than one working experience within the GCC countries, thus he/she was asked to compare and contrast these assignments.

With regards to the interview questions design, Brinkmann and Kvale (2015, p.157) assert that:

> Dynamically, the questions should promote a positive interaction, keep the flow of the conversation going and stimulate the subjects to talk about their experiences and feelings. The questions should be easy to understand, short, and devoid of academic language.

The design of my interview guide (see Appendix D) followed the aforementioned principles. Topics were divided into two parts in relation to the research question. In part one topics were related to the subject’s background, motivation for the assignment and adjustment period in the GCC countries. In part two, the three questions were linked to critical incidents. Before the Skype interview every subject received an email including the purpose of the interview and benefits for them (Appendix A), the consent form (Appendix B) and demographic information form (Appendix C).

### 4.3.1 Unit of Analysis

The level of analysis concerns "the level of aggregation of the data collected during the subsequent data analysis stage'' (Sekaran and Bougie, 2013, p.104). As my research question addresses self-initiated expatriates' learning and development of global leadership skills while working abroad the unit of analysis in my study is the individual SIE manager.

### 4.3.2 The Subjects

Within a qualitative interview a researcher engages in a conversation with individuals not as objects restricted by causal laws but as subjects who actively take part in meaning making (Brinkmann and Kvale, 2015). Moreover, individuals are subject to discussions, power relationships and various beliefs which are not of their own making but which they are, nevertheless, influenced by and hence these are part of their stories (ibid). I agree with Brinkmann and Kvale (2015) that the use of the term 'subject' is more appropriate than the term 'participant' due to the active role of the interviewees in the interviews, but also due to the impact of the environment on their experiences. Thus, I will use the term 'subject' instead of 'participant' to describe the self-initiated expatriate interviewees in my study.

### 4.3.3 Criteria for Subjects Selection

The purpose of qualitative study is to perceive and interpret a phenomenon from the point of view of the subjects. Hence, the researcher must decide on a sample from which the most can be learned (Merriam, 2002). In doing so a researcher must specify the criteria for the sample selection, which will provide the most information about the phenomenon under study. Given the scope and objective of my study (i.e., self-initiated expatriates learning and developing global leadership skills within the context of the GCC countries), the criteria for the self-initiated expatriate subjects for selection were as follows:

1. Individuals who moved to the GCC countries on their own initiative in order to work in a new organisation. The new job position abroad could have been found either before or after relocation to the host country.

2. Subjects had to hold a middle or senior managerial job position within any industry.
3. Subjects had to have at least six months of working experience in the host country and have the intention to relocate to their home country at some point in the future.

As for the nationalities of the thirty subjects, nearly two-thirds (18) were Irish (14) and British (4). The remaining subjects' nationalities were as follows: Greeks (3), Egyptians (2), Americans (2), Canadian (1), Egyptian/Canadian (1), Canadian/Irish (1), Lebanese (1) and Sri Lankan (1). The interviewees were mainly based in KSA (16), Qatar (8), UAE (4), Kuwait (1) and Bahrain (1). Most of the subjects work in the banking, healthcare and construction sectors. A major challenge this study faced was finding more subjects in general and, more specifically, subjects from developing countries. I sent many emails to subjects from both developed and developing countries, but in most cases subjects from developed countries were more willing to participate in an interview. With regard to gender, the majority were men (27), while three were women. Despite diligent attempts to locate more female SIEs, only three were found as there is a shortfall of foreign women in managerial positions within the GCC countries. According to Brookfield Survey (2016) on global mobility trends, only 25 per cent of assignees are women. Table 4.3 below details the demographic profile of all subjects.

The age of the subjects ranged from 24 to 58 years. The majority of the subjects were over 45 years old and therefore had extensive experience in their respective countries, and all held middle or senior positions in the GCC countries. With regard to education, most of the subjects had a master's degree in their respective field. Moreover, the majority of the subjects were married and had families, but few brought their families to the GCC countries. As for location, most of the subjects were based in three countries KSA, Qatar, and the UAE. Just two were based in Kuwait and Bahrain respectively. Appendix F presents the profile of each subject.

### Table 4.3 Demographic Profiles of Subjects

| Total number of participants 30 | n | % |
|---|---|---|
| **Age** | | |
| *21-29* | 1 | 4 |
| *30-39* | 2 | 6 |
| *40-49* | 11 | 37 |
| *50-59* | 16 | 53 |
| | | |
| **Marital status** | | |
| *Single* | 6 | 20 |
| *Married/partner* | 24 | 80 |
| | | |
| **Years in the GCC countries** | | |
| *1-3* | 5 | 16 |
| *3-5* | 11 | 37 |
| *5-10* | 11 | 37 |
| *10+* | 3 | 10 |
| | | |
| **Education** | | |
| *Diploma/College* | 3 | 10 |
| *Bachelor* | 10 | 33 |
| *Masters* | 16 | 53 |
| *Doctorate* | 1 | 4 |
| | | |
| **Previous international experience** | | |
| *None* | 13 | 43 |
| *1 country* | 10 | |
| *2 countries* | 4 | |
| *3 countries* | 1 | |
| *More than 3 countries* | 2 | |

### 4.3.4 Sampling Procedure and Size

Both convenience and snowball sampling techniques were used as a sampling procedure in my study in order to identify the 30 final interviewees. Convenience sampling is considered to be a kind of non-random sampling. Subjects are chosen on practical bases such as ease of reach for the researcher, available when needed, geographical closeness and the inclination to take part (Etikan et al., 2016). The use of convenience sampling was considered because of the difficulty in yielding enough subjects by using snowball sampling. Moreover, convenience sampling was facilitated by my supervisor's contacts with the Irish community in the KSA.

The snowball sampling method relies on asking one subject to give the researcher the name of another subject, who sequentially provides the name of a third subject and so forth (Vogt, 1999). Subjects are invited to participate according to meeting the inclusion criterion defined by the researcher (Spreen, 1992). Snowball sampling is well suited to explorative and qualitative studies (Atkinson and Flint, 2001), predominantly through interviews, as is the case with my study. Moreover, snowball sampling is an efficient and inexpensive way (Faugier and Sargeant, 1997, in Evans, 1994) to find subjects within the aforementioned countries in the GCC countries when it would be difficult to locate these SIEs within the expatriate population.

Given that snowball sampling relies on a succession of referrals between a group of people known to each other (Berg, 1988), it can have the disadvantage of leading to biased results (Sadler et al., 2010) due to an over-representation of subjects with social relationships that result in similar characteristics (Magnani et al., 2005). One way to avoid such a drawback that I utilised in my sampling method is to use more referral chains, with less links in each, in order to arrive at a more diversified sample of subjects. Nearly half the subjects in my study were selected by snowball sampling. First contacts were found from expatriates' groups on Facebook, friends working in the GCC countries, acquaintances of my PhD colleagues and from expatriates working in the GCC countries that I approached while working as a recruitment consultant in Dublin.

With regards to the sample size, although many more invitations were sent to subjects, only thirty agreed to participate in the interviews. Marshall et al. (2013) contend that there is no agreement between qualitative researchers regarding the sample size. Moreover, Mintzberg (1979) argues that small samples should not be excluded if they can yield better results; hence, researchers should not express regret even for a sample size of one. Concerning expatriation studies, Tharenou (2015) posits that there is a consensus among a number of scholars that valid results can be yielded in interview studies from an average sample size of thirty subjects (cf. Thomson, 2010; Barker et al., 2012; Dworkin, 2012).

The estimated sufficient sample size is also related to the data saturation concept (Marshall et al., 2013). That is “the point at which the data collection process no longer offers any new or relevant data” (Dworkin, 2012, p.1319). In my study the sample size was adequate since the homogeneity of subjects (nearly half Irish and British) meant that my interviews did not yield any new data.

### 4.3.5 CIT Phenomenological Interviews as Research Strategy

In this study I use a phenomenological approach to my semi-structured critical incident technique (CIT) interviews. This data collection method is well suited to my research, as according to Stern et al. (1998, p.196):

> The phenomenological interview (Thompson, Locander, & Pollio, 1989) complements the CIT (Bitner et al., 1990) by eliciting information about the antecedents and consequences of a single incident, moving backward and forward in time to situate a single incident in the individual's life history.

In addition, the combination of CIT and phenomenological approaches in the interviews yields positive results because of their different perspectives. This is the case according to Stern et al. (1998), as the use of CIT interviews generates replies to a sequence of research-driven questions (Bitner et al., 1990), while the phenomenological approach generates the subject’s point of view rather than the researcher’s assumptions (Polkinghome, 1989).

#### 4.3.5.1 Critical Incident Technique (CIT)

In his seminal work, Flanagan (1954, p.327) defined CIT as:

> a set of procedures for collecting direct observations of human behavior in such a way as to facilitate their potential usefulness in solving practical problems and developing broad psychological principles. The critical incident technique outlines procedures for collecting observed incidents having special significance and meeting systematically defined criteria. By an incident is meant any observable human activity that is sufficiently complete in itself to permit inferences and predictions to be made about the person performing the act. To be critical, an incident must occur in a situation where the purpose or intent of the act seems fairly clear to the observer and where its consequences are sufficiently definite to leave little doubt concerning its effects.

The use of CIT in the 1950s was undoubtedly one of the most influential quantitative research procedures in the social sciences (Chell, 2004). Yet, the critical incident definition was modified through the years (Edvardsson and Roos, 2001). These changes made sense as CIT was applied in various new contexts (Mallak et al., 2003) as an investigative tool within qualitative research (Chell, 2004). Such an alternative definition is Chell's (2004, p.48), who described the critical interview technique as:

> a qualitative interview procedure, which facilitates the investigation of significant occurrences (events, incidents, processes or issues), identified by the respondent, the way they are managed, and the outcomes in terms of perceived effects. The objective is to gain an understanding of the incident from the perspective of the individual, taking into account cognitive, affective and behavioural elements.

Hence, such a method supposes that reality is unique instead of specific, that collected data are subjective rather than objective and that knowledge is socially interpreted as opposed to scientifically verified (Chell and Pittaway, 1998).

The CIT was used in my semi-structured interviews to elicit various challenges the subjects had to face in order to learn and develop global leadership skills during their working and living experience in the GCC countries. I chose CIT for its flexibility in the design of my research with regards to sampling, data collection and data analysis (Bradbury-Jones and Tranter, 2008). As noted by Mintzberg (1973, quoted in Wang, 2011, p.12):

> This method uses factual accounts of actual events in which the purpose and consequence of the behavior are clear, focusing on the specific reasons for actions and behaviors. This technique is considered to be one of the best research techniques for focusing on the more important aspects of managerial behaviour and allows for intense probing and the collection of concrete examples of behaviour.

The reclamation of applying CIT to various studies related to managerial skills and behaviour has been emphasised by a variety of scholars. For example, Graf (2004) suggested the use of CIT to measure intercultural competencies to select expatriates. Moreover, Mintzberg (1973) recommended CIT to measure managerial behaviour. In addition, CIT was successfully used to determine the efficient practice and skills for a broad range of professionals in many disciplines (Hettlage and Steinlin, 2006). Furthermore, CIT was also used in order to elicit competencies, effectiveness and cultural competence (Koskinen et al., 2009) with regards to expatriate managers and leaders (i.e. Neupert et al., 2005; Ruiz et al., 2013; Wang, 2011), leadership competencies (i.e Boak and Coolican, 2001), managerial capabilities specifications (Borman and Brush, 1993), managerial and leadership efficiency (i.e. Hamlin, 2004; 2005; Hamlin and Serventi, 2008), successful and effective repatriation (i.e Janssens et al., 2006; Stahl, 2001), and inefficient managerial coaching (i.e. Ellinger et al., 2008).

#### 4.3.5.2 The Background of CIT

John Flanagan developed CIT during World War II for the USA Army Air Forces as the head of the Aviation Psychology Program. As the number of pilot failures during training was unreasonably high, this led to an analysis of personality traits predicting successful training which proved to be deficient (Fountain, 1999). As a different option, Flanagan examined confirmed incidents leading to success and failure in training, then looked to retrospective behaviours that yielded positive and negative results (Flanagan, 1954). Flanagan's findings played a major role in determining assessment specifications for flight crews and developing flight training plans of action (Weisgerber et al.,1990). After Flanagan (1954) published his classical article, the use of CIT declined from the late 1950s onwards as more attention was given to quantitative research (Norman et al., 1992). In the 1990s CIT gained popularity as a qualitative research method and is acknowledged as an efficient investigational instrument (Chell, 2004; Woolsey, 1986).

According to Butterfield et al. (2005), CIT has been used broadly in varied disciplines, including communications (Query and Wright, 2003; Stano, 1983), nursing (Dachelet et al., 1981; Kemppainen et al., 1998), job analysis (Kanyangale and MacLachlan, 1995; Stitt-Gohdes et al., 2000), counselling (Dix and Savickas, 1995; McCormick, 1997), education and teaching (LeMare and Sohbat, 2002; Oaklief, 1976; Parker, 1995; Tirri and Koro-Ljungberg, 2002), medicine (Humphery and Nazarath, 2001; McNabb et al., 1986), marketing (Derbaix and Vanhamme, 2003; Keaveney, 1995), organisational learning (Ellinger and Bostrom, 2002; Skiba, 2000), performance appraisal (Evans, 1994; Schwab et al., 1975), psychology (Cerna, 2000; Pope and Vetter, 1992), and social work (Dworkin, 1988; Mills and Vine, 1990).

#### 4.3.5.3 The Evolution of CIT

Following Flanagan's (1954) influential article, CIT has been expanded as a method within the last 60 years. Four notable expansions to Flanagan's method were identified (Butterfield et al., 2005). According to Stano (1983, cited in Butterfield et al., 2005), at first CIT was behaviourally focused, with no emphasis on studies regarding experiences and psychological conditions. That changed with articles, for example, on studying work motivation (i.e. Herzberg et al., 1959), the quality of life in the USA (Flanagan, 1978) and the link between cognitions and emotions (i.e. Weiner et al., 1979). The second modification concerned the use of retrospective recalled stories by subjects as opposed to Flanagan's (1954) direct observation (Butterfield et al., 2005). The third alteration regarded the analysis of data, as some researchers did not follow Flanagan's formation of categories in data analysis (ibid). That could be the case because the extent of CIT has been expanded from task analysis to the exploration of personal experiences, emotions and psychological constructs (ibid). Finally, the fourth extension concerns the demonstration of credible and trustworthy CIT expanded studies (ibid). This is understandable as two older studies (cf. Andersson and Nilsson 1964; Ronan and Latham 1974) which followed a positivistic stance were used to demonstrate the credibility of findings in CIT studies.

As pinpointed by Flanagan (1954, p.335), CIT "does not consist of a single rigid set of rules governing such data collection. Rather it should be thought of as a flexible set of principles that must be modified and adapted to meet the specific situation at hand". Flanagan's view makes perfect sense today as CIT is widely used within many fields in both quantitative and qualitative studies.

#### 4.3.5.4 CIT Five Steps Procedure

In the 1950s, CIT was used as a scientific tool as the positivistic approach was the norm (Chell, 2004). But since the 1990s CIT has been widely used and adopted as an investigative tool within qualitative research (ibid). In conducting my interviews, I adopted Chell's CIT phenomenological approach. I will now delineate the steps used in conducting my critical incident interviews.

At the start of the skype interview rapport with the subject was built and, if needed, more explanation was given as to the definition of critical incident in order to facilitate the subject's recall of suitable critical incident events. Each candidate was asked to recall three positive or negative incidents that they experienced. A challenge during the first interviews was the difficulty some candidates had in recalling three critical incidents. I managed to overcome this challenge by sending the questions beforehand to the subjects in order for them to have the time to think back on specific critical incidents. The interviews lasted anywhere from thirty minutes to ninety minutes, averaging about forty-five minutes in total. Although the interviews were recorded with the permission of the subjects, I took notes during and after each interview with regards to interesting details recalled by the interviewees. It is worth noting that half of the subjects had at least one previous international assignment. In cases where the assignments were both in the GCC countries, interviewees were asked to compare and contrast between faced challenges in both countries and how previous assignment-gained experience helped them to adjust and perform in their current assignment.

In my study, the subjects were asked to identify critical incidents that affected their learning and development of GLC. Therefore, subjects were not asked directly about what kind of competencies they developed during their stay and how they developed them. Rather, they were asked about critical incidents they learned from in order to adjust to their new environment. The CIT five steps process is described below.

##### a. Focusing on Events

Each subject was asked to recall three critical incidents (positive or negative) and interpret their learning experiences (See Appendix D). My role as the interviewer was to probe the subject in order to have complete data on each critical incident, including the chronological order of events coupled with as much detail as possible. In some interviews recalled incidents were not relevant, hence I had to ask the interviewees to recollect another incident. Additionally, in some interviews subjects initially shared challenges in general they had to face. In this case I had to ask them to recall a specific incident.

### b. Control of Interview

All subjects were probed with specific questions to recall each critical incident event. Probing questions were organised in the following order: a) probing on antecedent information, so for example: "what was the background situation that led up to the critical incident?"; b) probing on action, so for instance: What happened next? How did it happen? Why did it happen? How did you feel?; c) probing on reaction, such as: what was the outcome of the critical incident that you described? What led to the positive or negative outcome? What did you learn from this experience? What part of the experience would you consider learning? How have these experiences influenced or not influenced you as a manager in the decisions that you have subsequently made?

### c. Conducting the Interview

At the end of the interview the subjects were thanked for their participation and reassured of the confidentiality of the information provided. Furthermore, they were informed that they would receive a report with the findings of the research. The subjects were also asked for their permission to be contacted at a later stage if more information was needed. After the interviews the majority of the subjects were contacted by email to clarify some of their responses.

### d. Ethical Issues

The study qualifies as a low risk social research project as it was approved by Dublin City University Research Ethics Committee on 24th of April 2015 (Ref number: DCUREC/2015/118). Moreover, the names of the SIE managers are not revealed in the data analysis but are substituted with numbers.

### e. Data Analysis

An English native speaker was hired to transcribe each recorded interview into a Word file. I had to review the recordings and transcriptions for accuracy. The method of transcription used was "denaturalism", "where pauses are removed, grammar corrected, and even non-standard accents standardised" (Caulfield and Hill 2014, p.181). This method of transcription suited the purpose of my data analysis, that is the description of the subject's learning experience as a SIE that would allow the analysis of data via my developed conceptual framework.

Data analysis in a qualitative study consists of "preparing and organising the data for analysis, then reducing the data into themes through a process of coding and condensing the codes, and finally representing the data in figures, tables or a discussion" (Creswell, 2013, p.148). An inductively driven thematic analysis (TA) is used to analyse the data from the critical incidents' interviews. Performing TA is detailed in Section 4.4.

#### 4.3.5.6 Main Criteria for Incidents

In order to be critical, an incident was required to meet the following four criteria: (1) occurred during the SIE's stay in the current host country; (2) involved the SIE manager versus employee/supervisor interaction; (3) being either a positive or negative incident from the SIE's perspective; (4) having enough details to be visualised by the interviewer. Each subject in my critical incident interviews was asked to identify three positive or negative incidents, episodes or events in total, and interpret their learning experiences. According to Bradbury-Jones and Tranter (2008), this process is the most effective technique among researchers (Grant et al., 1996; Kemppainen et al., 1998; Redfern and Norman 1999; Wendt et al., 2004; Persson and Martensson 2006). Moreover, identifying positive and/or negative incidents helps to provide a better description of the studied phenomenon (Cormack, 2000) through the advantageous use of probing questions (Edvardsson and Roos, 2001).

#### 4.3.5.7 Advantages and Drawbacks of CIT Interviews

According to Cope and Watts (2000), many researchers pinpointed the advantages of CIT as a data collection method (i.e. Gilbert and Morris, 1995; Ronan and Latham, 1974; Andersson and Nilsson, 1964). One of the main strengths of CIT is its flexibility as a research methodology, which can be adjusted to fit the current circumstances at hand (Flanagan, 1954), either in qualitative or quantitative research (Chell and Pittaway (1998). Secondly, CIT is context-rich as subjects will recall subjective incidents pertinent to them regarding the investigated case (Gremler, 2004). This is coupled with robust probing and the collection of specific instances of behaviour as Hamlin (2004) and Wang (2011) reported from Mintzberg (1973). Thus, data generated will be detailed and incidents will be recorded thoroughly (Grove and Fisk, 1997). Thirdly, CIT is identified as a “culturally neutral method” (Perkins et al., 1994). Consequently, subjects interviewed can share their perspectives from various incidents instead of replying to specific questions from a survey, which is less sensitive culturally (Gremler, 2004). Finally, using CIT suits my interview questions well regarding experiential learning and sensemaking. As Parker et al. (1995, p.112) argue, CIT allows subjects “to both learn from experience and make sense of past experiences” (i.e. Flanagan, 1954; Rimon, 1979; Clamp, 1980). Moreover, CIT is considered as “a real technique for the revelation of sensemaking processes in crisis situations” (Parry, 2003, p.247). Table 4.4 below delineates the key advantages of CIT.

Nevertheless, CIT is not without disadvantages. One mentioned limitation is that recalled incidents are retrospective (Chell, 1998), therefore subjects may fail to remember the exact facts from the incidents, as mentioned by Singh and Wilkes (1996, reported in Gremler, 2004). But thoroughness is expected in collecting and analysing the data in qualitative research (Denzin, 2000). Moreover, since incidents are ‘critical’, subjects should be able to bring details to mind (Chell, 1998).

### Table 4.4: Advantages of CIT

| |
|---|
| ***Collected from actors' perspective vs the opinions of outside experts*** |
| ***Reinforces idea of the 'answers are in the model'*** |
| ***Especially useful in determining detailed situational behaviour*** |
| ***Develops a comprehensive picture*** |
| ***Best technique for developing behavioural criteria*** |
| ***Ability to discover both universal and contingent behaviour*** |
| ***Proven methodology - used with considerable documented success*** |
| ***Generates rich qualitative data*** |

(Source: Ellinger, 1997 adapted from Clawson, 1992)

Moreover, the fact that an incident is retrospective is well suited to my interview question relating to sensemaking, as one of sensemaking's characteristics is being retrospective. A second concern is the validity and reliability of CIT with regards to the importance and criticality of collected incidents in order to be significant (McNeil and Perdigo, 2001). Andersson and Nilsson (1964), in one of the most important studies on CIT reliability and validity, found this to be the case. Furthermore, as Sharoff (2008, p.307) contends: "Validity of data gleaned is partially ensured by the fact that all participants focus on the same issues." Additionally, in order to improve the CIT interviews reliability as advised by Chell (2014), I have conducted a second interview with few subjects to elicit clarifications. In general, according to Bitner et al. (1990) several researchers found CIT to be both reliable and valid (i.e. Andersson and Nilsson, 1964; Ronan and Latham, 1974; White and Locke, 1981). Moreover, CIT is considered in general to be a well-founded method of data collection (Gremler, 2004; Bitner et al., 1990).

### 4.3.6 Using Skype In Qualitative Interviews

Bradbury-Jones and Tranter (2008) postulate that many CIT interviews are conducted face to face. But, due to financial and time restrictions, face-to-face interviews are not convenient in cases where the subjects are geographically and physically dispersed (Cater, 2011). As this was the case with the interviewees in my study, using Skype videoconferencing was the most appropriate tool to conduct the interviews for multiple reasons.

The use of Skype interviews to collect data has some advantages and a few drawbacks. One of the main advantages of using Skype in research interviews is the ability to connect with subjects all over the world without incurring travel costs (O'Connor et al., 2008). Secondly, the researcher has the opportunity to speak and see the subject in real time as in face-to-face interviews (Deakin and Wakefield, 2014). Hence, the interactions can have a "human feeling" (Salmons, 2015) and rapport can be built between the researcher and interviewees (Deakin and Wakefield, 2014. Thirdly, visual and audio interaction can be recorded in Skype videoconferencing (Hanna, 2012), hence, the interviewer gains a wealth of verbal and nonverbal data (Bertrand and Bourdeau, 2010). In my study, only audio interaction was recorded as visual interactions are not critical in my phenomenological interviews. Fourthly, Skype interviews enable both the interviewer and the subject to be flexible with regards to the time schedule (Deakin and Wakefield, 2014 and day (i.e. weekends) of the interviews. That was not, however, the case with many of my interviews as the weekend in the GCC countries is on Friday and Saturday. Moreover, there are four hours of difference between the GCC countries and Europe. Hence, Saturday was usually the only viable option to conduct the interviews. Fifthly, concerning ethical issues, the subject can always withdraw during the interview with a click of a button, or disclose his/her phone number (Janghorban et al., 2014). Finally, both interviewer and subject choose their own location for the interview and do not impose on each other's personal space (Hanna, 2012). In some cases, the interviewees were at home or on vacation, while in other cases they were at work as they are busy professionals.

As for the disadvantages of Skype, technical problems with internet connections or recorders might emerge as an issue (Sullivan, 2012). As a result, in two interviews the use of FaceTime was more convenient for the subjects than Skype. Moreover, ‘dropout’ rates of Skype interviews might be higher than for face-to-face interviews (Janghorban et al., 2014). This happened in a few of my planned interviews due to the ease of just not showing up on a Skype interview, whereas a subject would most probably take the initiative to cancel a face-to-face interview. All-in-all, using Skype to conduct my study’s interviews was a practical research method, available globally due to the expansion of broadband internet availability (Deakin and Wakefield, 2014).  In addition, the advantages of Skype clearly prevail over the disadvantages (Sullivan, 2012).

All Skype interviews were recorded with the permission of the subjects then saved and sent for transcription. An informed consent form and a demographic information form were sent to all subjects to fill in before the interview. All Skype interviews were conducted in English, although English was not the mother tongue of all subjects. This may have been a disadvantage for non-native English speaker subjects. During each skype interview I kept notes regarding some interesting facts mentioned by the interviewee and my comments about the interview.  In the next section performing TA is discussed.

## 4.4 Performing Thematic Analysis

According to Kawulich (2004, p.96), data analysis within a qualitative research should derive from:

> a combination of factors, which include the research questions being asked, the theoretical foundation of the study, and the appropriateness of the technique for making sense of the data. Analysing qualitative data typically involves immersing oneself in the data to become familiar with it, then looking for patterns and themes, searching for various relationships between data that help the researchers to understand what they have, then visually displaying the information and writing it up.

After the collection of data and transcription of the interviews, “two tasks have to be tackled: the decision about a general frame of reference to describe the incidents and the inductive development of main and subcategories” (Gremler, 2004, p.66). Hence, my selected interviews data were analysed in two stages. In the first stage, all selected data including the critical incidents were subjected to thematic analysis involving a first-level open coding to generate, among other things, the number of positive and negative incidents. Information contained in the stories was carefully scrutinised to identify data categories that summarise and describe the incidents (Grove and Fisk, 1997; Stauss, 1993). Thus, in the second stage, the coded data from the first stage were subjected to second-level open coding in order to compare and contrast, then categorise them into themes according to their similarities and differences.

The main categories of classification can either be deduced from theoretical models or formed on the basis of inductive interpretation (Stauss, 1993). Given these considerations, my research adopts an inductive approach that employs qualitative critical incidents interviews to explore how SIEs develop global leadership skills during their working experience in the GCC countries. Data was analysed through thematic analysis (TA).

The following sub-sections deal with the background of TA, an overview of various definitions of TA, a code and a theme. This is followed by a consideration of the advantages and disadvantages of TA. Next, the suitability of TA in my study is discussed. I then conclude with the phases of TA to be followed in the data analysis and the quality issue in my qualitative study.

### 4.4.1 Historical Background of Thematic Analysis

Thematic analysis was developed by physicist and historian of science Gerald Holton in the 1970s (Merton, 1975). Although TA was used by many researchers (e.g., Aronson, 1994; Boyatzis, 1998; Guest et al., 2011; Joffe and Yardley, 2004; Patton, 1990; King, 2004), it was not well defined as a qualitative data analysis method (Braun and Clarke, 2006). Moreover, in many cases researchers used TA while naming it differently (e.g., grounded theory or discourse analysis), or used TA without any guiding reference (Braun & Clarke, 2012). TA possibly emerged out of content analysis and could be viewed as a type of qualitative content analysis (Joffe, 2012). Additionally, TA is frequently linked to an experiential perspective to qualitative psychology (Braun and Clarke, 2014), and some researchers distinguish TA as a phenomenological method (e.g., Guest et al., 2011; Joffe, 2012). Braun and Clarke (2014), both critical psychologists, proposed a theoretically flexible method of doing TA. Howitt and Cramer (2008) argue that Braun and Clarke (2006) developed TA in a structured and sophisticated way.

Today TA is a recognised, approved and more broadly discussed data analysis method (Whittaker, 2012; Joffe, 2012; Rogers, 2011; Howitt and Cramer, 2008).

### 4.4.2 Definition of Thematic Analysis

Within human sciences narrative analysis makes reference to a group of methods of analysing various types of texts which shares a storyline form (Riessman, 2005). Narrative is described as: "one method of recapitulating past experience by matching a verbal sequence of clauses to the sequence of events which (it is inferred) actually occurred" (Labov, 1972, p.359-60). TA is considered as one type of narrative analysis which stresses the content of a text (Riessman, 2005).

Some definitions of TA are narrowly focused on the use of the method in phenomenological studies and define the use of "themes" in analysing the data. For example, Wilson (1993, p.342) states that "Thematic analysis is a strategy in phenomenological research that involves recognising common themes in textual data." In other definitions the emphasis is put on the various phases and objectives of TA. For instance, Boyatzis (1998) describes thematic analysis as a way of perceiving. Moreover, according to Boyatzis (1998) this process is used with qualitative data and can be used with almost all qualitative methods. Furthermore, it consists of three stages of investigation, namely observation that antecedes understanding, identifying a vital moment (seeing) which antecedes encoding it (see it as something) which in succession antecedes interpretation. Furthermore, thematic analysis in this case is viewed as a method with manifold purposes, that is: to analyse qualitative information; understand unrelated material; systematically to observe an individual, a situation or an interaction; and to convert qualitative information into quantitative data (ibid). It is worth mentioning that Boyatzis work was criticised by Braun and Clarke (2006) for being inaccessible to inexperienced researchers with qualitative techniques, it being situated in the positivist paradigm.

Braun and Clarke (2006, p.6) define TA as:

> a method for identifying, analysing, and reporting patterns (themes) within data. It minimally organises and describes your data set in (rich) detail. However, it also often goes further than this, and interprets various aspects of the research topic.

This definition was adopted in the current study as it highlights the purpose and flexibility of TA as a method. Braun and Clarke (2013) consider TA to be just an analytic method rather than a methodology. Furthermore, they regard TA as theoretically flexible, which means that it can be implemented to a variety of theoretical frameworks (Braun and Clarke, 2014). In my study I use Braun and Clarke's (2006) approach to TA for its flexibility as a method of data analysis. In addition, Braun and Clarke published several detailed articles and a book on how to perform TA. Even more helpful were the examples of TA within their articles as well as common errors to avoid. Hence, TA was accessible to me as a researcher.

In the next two sections I provide the definitions of ‘code’ and ‘theme’.

### 4.4.3 The Definition of a Code

Differentiation between a theme and a code is crucial as collected data gets first coded then a theme would be the result of “coding, categorization, and analytic reflection” (Saldaňa, 2015, p.13). It should be noted that codes are the basis of data analysis, hence, if analysis is envisaged as a brick, tiled-roof house, then themes would be the roof and walls and codes the individual tiles and bricks (Braun and Clarke, 2013).

A code is defined in qualitative research as “a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data” (Saldaňa, 2015, p.3).

### 4.4.4 The Definition of a Theme

TA demonstrates which themes are significant in the description of the phenomenon under study (Daly et al., 1997). Since TA makes reference to themes, it is vital to define the meaning of the term theme. In one definition, a theme is defined as “a data analysis technique used in phenomenological studies involves data from interviews with study subjects to discover themes or categories of experiences as viewed from the subjects’ perspective” (Dempsey and Dempsey, 1996 p.145). This definition confines the term theme within phenomenological studies. Additionally, it is more a definition of thematic analysis than of the term theme (DeSantis and Ugarriza, 2000). A second definition of theme states that:

> Thematic analysis involves the search for and identification of common threads that extend throughout an entire interview or set of interviews. Themes are usually quite abstract and therefore difficult to identify. Often the theme does not immediately “jump out” of the interview but may be more apparent if the researcher steps back and considers. “What are these folks trying to tell me?” The theme may be beneath the surface of the interviews but, once identified, appears obvious. Frequently, these themes are concepts *indicated* by the data rather than concrete entities directly described by the participants... Once identified, the themes appear to be significant concepts that link substantial portions of the interviews together. (Morse and Field, 1995 p.139–40)

This long definition of the term theme uses thematic analysis as a frame of reference. For the purpose of my data analysis, Braun and Clarke’s (2006, p.6) definition was adopted in my research. This states that a theme “captures something important about the data in relation to the research question and represents some level of *patterned* response or meaning within the data set”. This definition is more concise and highlights the link between themes’ important patterned responses and the research question.

### 4.4.5 Advantages and Disadvantages of TA

After considering several research methods, TA was selected in my study as the most appropriate for analysing my data. Two main advantages of TA are its accessibility and flexibility as a method of data analysis (Braun and Clarke, 2012). TA can be applied within a broad range of theoretical frameworks from essentialist to constructionist (Braun and Clarke, 2013). Moreover, TA can be used to tackle a broad range of research questions (Braun and Clarke, 2014), including questions on individual’s experiences and points of view (Braun and Clarke, 2006). In addition, TA can be used to analyse most types of qualitative data, either large or small datasets (Braun and Clarke, 2013) and produce ‘bottom-up’ data-driven or ‘top-down’ theoretically-driven data analyses (Braun and Clarke, 2014). In Table 4.5 the advantages of TA are delineated.

Thematic Analysis has been successfully used in analysing critical incident interviews data (e.g. Boyatzis, 1998) for similar research questions as in my study. More specifically, TA has been used to analyse critical incident data with the same unit of analysis (expatriate managers) in order to identify various competencies (i.e leaders' effectiveness) in numerous studies (e.g. Ruiz et al., 2013; Wang, 2011; Hamlin and Patel, 2012; Hamlin et al., 2006; Hamlin et al., 2010).

**Table 4.5: Advantages of Thematic Analysis**

| |
|---|
| A flexible method of analysis. |
| Relatively easy and quick method to learn and do. |
| Accessible to researchers with little or no experience of qualitative research. |
| Results are generally accessible to educated general public. |
| Useful method for working within participatory research paradigm, with participants as collaborators. |
| Can usefully summarise key features of a large body of data, and/or offer a "thick description‟ of the data set. |
| Can underline similarities and differences across the data set. |
| Can generate unpredicted insights. |
| Allows for social as well as psychological interpretations of data. |
| Can be useful for producing qualitative analyses suited to informing policy development. |

(Source: Braun and Clarke, 2006)

Moreover, the combination of TA with phenomenology (e.g. Fereday and Muir-Cochrane, 2006) and its diverse forms has the potential to yield rich results (Joffe, 2011). This is due to the fact that the prime concern is on the subjects' subjective experience (ibid) instead of the researcher's concept of invented reality (Fereday and Muir-Cochrane, 2006). As agreed by several researchers (Klemp and McClelland 1986; Boyatzis, 1982; Spencer and Spencer, 1993, quoted in Boak and Coolican, 2001, p.215) "CIT are favoured for identifying competencies in order to uncover what a person actually does, as opposed to what they would like to think they do". Therefore, the subjects could disclose their genuine behaviour instead of their own explanation (Spencer and Spencer, 1993).

As for the limitations of TA, the method has been regarded by some qualitative researchers as less robust by comparison with other well established theoretically driven methods (e.g. grounded theory; interpretative phenomenological analysis)

(Braun and Clarke, 2013). Thus, TA would have a narrow interpretative potential if not related to a theoretical framework (Braun and Clarke, 2006). Furthermore, if interpretative analysis is pursued, the researcher is faced with lack of instructions (Braun and Clarke, 2014). In conclusion, these disadvantages can be overcome when research is guided by both a suitable research question and a broader theoretical assumption (Braun and Clarke, 2006). Hence, my analysis will interpret the data by taking into consideration my theoretical framework as a lens in order to inform my research question.

### 4.4.6 Major Decisions for Thematic Analysis:

Before starting the TA in my study some major decisions needed to be taken and explained. A first decision concerned doing selective coding as opposed to complete coding. I undertook a selective coding of my data, related to a group of themes linked to my research question. Hence, the process of coding focused on the critical incidents faced by subjects and their adjustment to the Gulf's culture. Subjects' responses with regards to their background and motivation for the assignments were discarded from the coding process as not linked directly to the research question.

An inductive perspective was used in my thematic analysis in order to provide a rich description of the data overall (Braun and Clarke, 2006). The inductive approach focal point is that "themes identified are strongly linked to the data themselves" as described by Patton (1990, cited in Braun and Clarke, 2006, p.12). Hence, my theoretical perspective, was used as a lens to inform my research question and as a support to what to look for regarding the challenges faced by the subjects, learning and adjustment to the new culture, and leadership competencies displayed. These challenges are linked to the phenomenological lived experiences of the subjects. Thus, the inductive perspective with regards to data coding and analysis is a bottom-up approach and data-driven (Braun and Clarke, 2012). But as noted "researchers cannot free themselves of their theoretical and epistemological commitments, and data are not coded in an epistemological vacuum" (Braun and Clarke, 2006, p.12).

Themes are identified at an interpretative level rather than a semantic level, which means that TA:

> will go beyond the semantic content of the data, and starts to identify or examine the underlying ideas, assumptions, and conceptualisations - and

> ideologies - that are theorised as shaping or informing the semantic content of the data. (Braun and Clarke, 2006, p.13)

The researcher's interpretative lens is always guided by his research epistemology regarding what can be said about the data and how meaning is theorised (Braun and Clarke, 2006). In my study a constructionist paradigm is used, in this case:

> meaning and experience are socially produced and reproduced, rather than inhering within individuals (Burr, 1995). Therefore, thematic analysis conducted within a constructionist framework cannot and does not seek to focus on motivation or individual psychologies, but instead seeks to theorise the socio-cultural contexts, and structural conditions, that enable the individual accounts that are provided. (Braun and Clarke, 2006, p.14)

Next, I delineate the six stages for TA to analyse my data, adopted from Braun and Clarke (2006).

### 4.4.7 Stages of Thematic Analysis

TA was performed in six steps within my study, as reported in Table 4.6. The first step included reading the transcribed data from my interviews in depth twice and listening to recorded interviews in order to look for "similarities and differences that enable the researcher to develop themes and categories" (Kawulich, 2004, p.104) at a later stage. During the reading I "pre-coded" by highlighting significant features offered by the subjects, details that struck me during the interviews, to use later as illustrative examples in my data analysis. Moreover, the transcription of the interviews was checked for accuracy with regards to the original audio recording (Braun and Clarke, 2006). Some minor mistakes were detected in transcribed interviews; this was the case when, for instance, subjects mentioned some Arabic words (such as the name of a company) during the interviews.

### Table 4.6: The Process of Thematic Analysis

| Stage | Description of procedure |
|---|---|
| ***1. Familiarisation with the data:*** | Transcribing data, reading and rereading the data, noting down initial ideas. |
| ***2. Generating initial codes:*** | Coding interesting features of the data in a systematic fashion across the entire data set; collating data relevant to each code. |
| ***3. Searching for themes:*** | Collating codes into potential themes; gathering all data relevant to each potential theme. |
| ***4. Reviewing themes:*** | Checking the themes work in relation to the coded extracts (Level 1) and the entire data set (Level 2); generating a "thematic map‟ of the analysis. |
| ***5. Defining and naming themes:*** | Ongoing analysis to refine the specifics of each theme, and the overall story the analysis tells; generating clear definitions and names for each theme. |
| ***6. Writing-up the report:*** | The final opportunity for analysis. Selection of vivid, compelling extract examples; final analysis of selected extracts; relating back of the analysis to the research question and literature; producing a scholarly report of the analysis. |

Source: (Braun and Clarke, 2006)

The second step involved the detailed and systematic coding of the data that are possibly pertinent to my research question (Braun and Clarke, 2012). Furthermore, the incorporated codes were both descriptive and interpretative (Braun and Clarke, 2012), that is capturing both the meaning of data on the surface and through my interpretative lens (Braun and Clarke, 2014). My aim at the beginning of this stage was to generate initial codes within the selected data as most researchers "feel that only the most salient portions of the corpus merit examination" (Saldaňa, 2015, p.15).

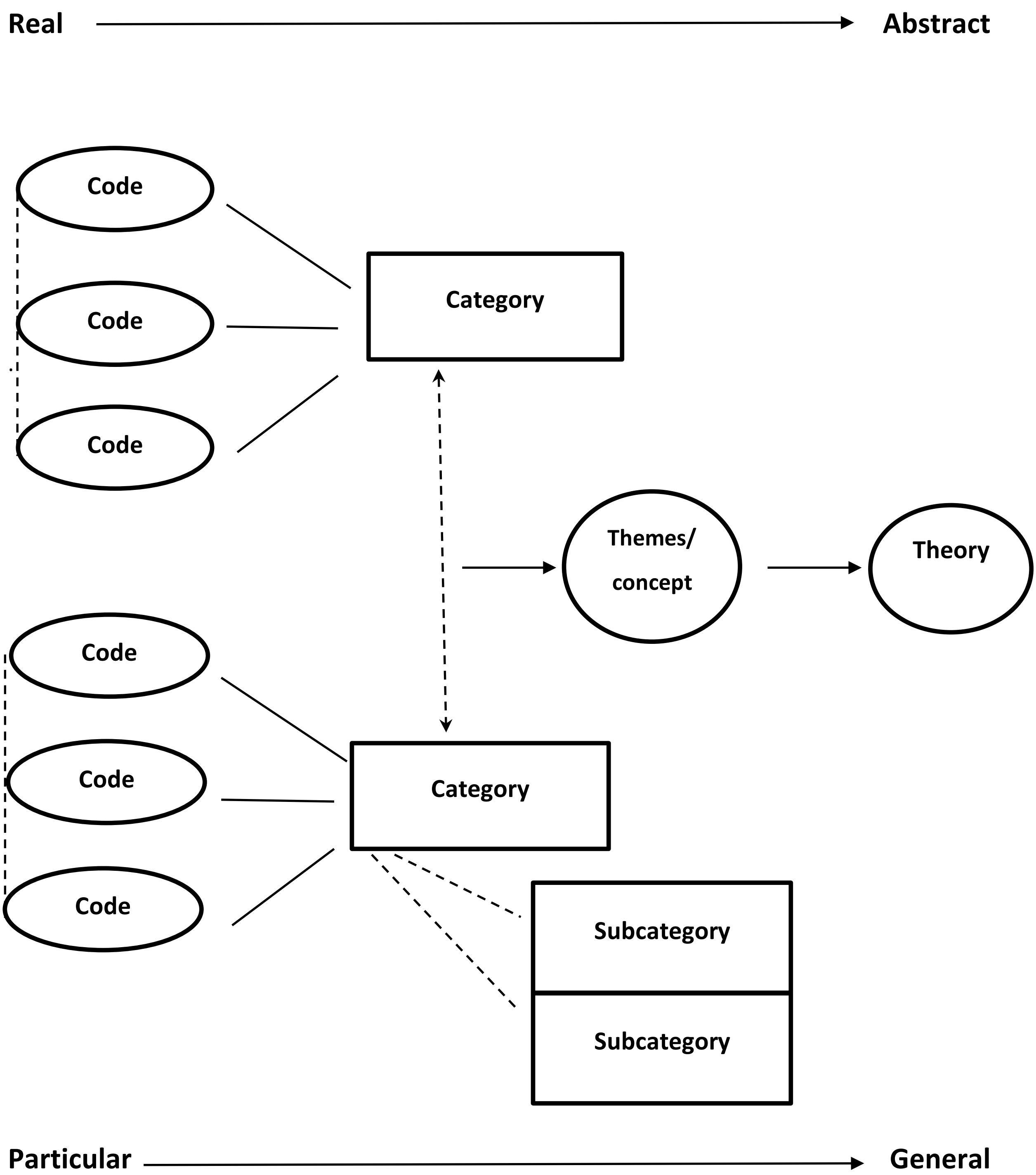
The coding of data was done manually, without the use of software. The advantage in this instance is "having more control over and ownership of the work" (Saldaňa, 2015, p.22). Moreover, a Word document was used to include the raw data from each interview transcripts in a first column, preliminary codes from first-cycle codes were added in a second column and final codes from second-cycle codes were added in a third column (Saldana, 2015). With regards to coding, I decided to split the data into smaller codable sentences (splitting) instead of using holistic coding (ibid) by coding a large chunk of sentences (Saldana, 2015). Hence, I generated more codes as my objective was to examine carefully the subjects' responses.

The emergent codes from second-cycle coding were then categorised based on my questions within the interview guide to explore specific topics (i.e. displayed leadership competencies) related to my research question. So, for example, codes such as empathy, mentoring, building trust were categorised as global leadership competencies. As described by Richard and Morse (2012), categorising is reached by getting up from the variety of data to shaped data (cited by Kawulich, 2004). The main characteristics of categories according to Kawulich (2004, p.98) are the following: "reflect the purpose of the research, be exhaustive, be mutually exclusive, be sensitive to category content and be conceptually congruent". The number of identified categories depended on the rate of occurrence of each category, the study's audience and distinctiveness of categories (ibid). The categories were then grouped and sorted to explore the potential themes.

Figure 4.2 delineates the model used in my qualitative investigation.

The third step focused on generating a set of prospective themes (Braun and Clarke, 2014) from the specified categories. Themes represent "some level of patterned response" (Braun and Clarke, 2006, p.10). My decision on the final themes was guided by the frequency of data captured within the chosen codes and categories and the use of the theoretical framework as a lens to infom my research question. Five candidate themes were selected at the end of this step.

Figure 4.2 A Simplified Codes-to-Theory Model for Qualitative Investigation




(Source: Saldaňa, 2015)

The fourth step comprised two levels to review and refine my themes. Candidates themes were checked if they fitted with regards to both the coded data extracts and entire data set (Clarke and Braun, 2013). A challenge in this stage was to decide if the sensemaking theme should be merged with the experiential learning challenges theme.

My final decision was that these two themes should remain separate as both tell a different part of the story. Moreover, there was enough data to support both themes. Another challenge in this phase was the decision I had to make regarding which quotes to include in each theme, given the numerous extracts within my data. Furthermore, some quotes seemed to fit in more than one theme. Hence, my decision to include or exclude a quote was based on the decided boundaries of each theme within the whole story.

As for step five, it consisted of defining and naming each one of my final five themes. A detailed analysis of each theme was conducted in order to identify its uniqueness (Braun and Clarke, 2012) and substance (Braun and Clarke, 2013) and included in chapter five, section 5.2. A definition was given to each theme and a characteristic sentence from the interview extracts was included in each theme title. Themes were presented in a logical and meaningful way (Braun and Clarke, 2012) with sufficient data extracts in order to confirm the prevalence of each theme (Braun and Clarke, 2006). Experiential learning challenges was the first theme. The second theme was reflecting via sensemaking, the third theme was learning through thinking, the fourth theme was acting by displaying global leadership skills and the fifth theme was adjustment in the new environment within the GCC countries. These five themes were selected as they captured and covered vital information with regards to my research question (Braun and Clarke, 2006) and theoretical framework. A thematic map was designed to include the five themes. In addition, selected extracts from the data were presented and analysed in order to build a story around each theme (Braun and Clarke, 2012). Figure 4.3 below presents the final thematic may including the five themes. Moreover, appendix E details an overview of a categorical analysis including codes, categories and the five themes.

Finally, step six contained the discussions and conclusions of my thematic analysis as findings are presented in chapter six. According to Kvale (1996), interpretation of data within qualitative analysis has three contexts:

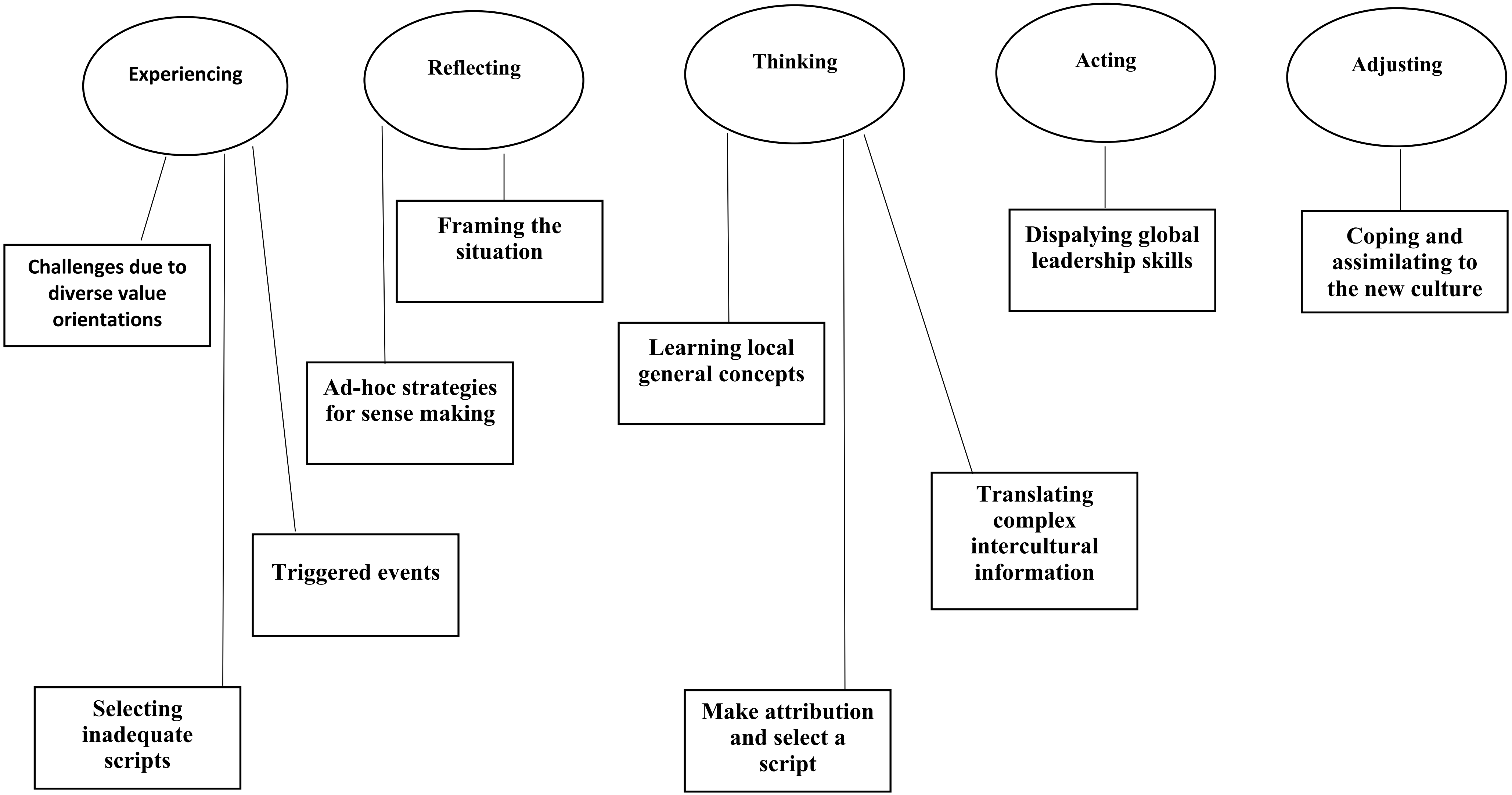
1. Self-understanding: Where the researcher put together in an abridged form what the subjects themselves comprehend and mean by their statements.

2. Critical common-sense understanding: Where the researcher makes use of general knowledge about the context of subjects' statements to position them in a wider framework.
3. Theoretical understanding: Where the interpretation of the subjects is positioned in a wider theoretical approach.

All three aforementioned perspectives were adopted in my data analysis. Moreover, by following this analytical process I was guided by my theoretical framework. The theoretical concept "provides the lens through which the data are viewed and helps the researcher to situate the results in the theory, which helps to facilitate the understanding of the data within that theoretical perspective" (Kawulich, 2004, p.100). In addition, the outcomes of analysis are compared and contrasted with the literature in order to draw conclusions.

Within my data analysis Braun and Clarke's (2006) criteria for good thematic analysis as a guidance are taken into consideration. Table 4.7 details a summary of the criteria for good TA.

Figure 4.3 Final Thematic Map



### 4.4.8 Reliability and Validity

Concepts of both reliability and validity were developed within quantitative research (Ritchie and Lewis, 2003). Reliability refers to whether the results of a study can be repeated (Bryman and Bell, 2011); that is, the replication of research findings in another study if the same or similar methods are used (Ritchie and Lewis, 2003). Such an example would be the IQ tests as a stable measurement of intelligence (Bryman and Bell, 2011). Validity, on the other hand, is concerned with "the integrity of the conclusions that are generated from a piece of research" (Bryman and Bell, 2011, p.42); for instance, the measurement of inflation and cost of living by using the retail price index (ibid).

Quantitative researchers put a lot of emphasis on validity and reliability criteria in evaluating the quality of research (Bryman and Bell, 2011). According to Carcary (2009), such criteria have little relevance for interpretivist researchers (e.g. Kvale, 1996; Marshall and Rossman, 1995; Mason, 2002). Hence, some authors have argued that qualitative research should be assessed according to different criteria from those used in quantitative research (Bryman and Bell, 2011, Guba and Lincoln, 1994).

### Table 4.7 A 15-Point Checklist of Criteria for Good Thematic Analysis

| Process | No. | Criteria |
|---|---|---|
| ***Transcription*** | 1 | The data have been transcribed to an appropriate level of detail, and the transcripts have been checked against the tapes for 'accuracy'. |
| | | |
| ***Coding*** | 2 | Each data item has been given equal attention in the coding process. |
| | 3 | Themes have not been generated from a few vivid examples (an anecdotal approach), but instead the coding process has been thorough, inclusive and comprehensive. |
| | 4 | All relevant extracts for all each theme have been collated. |
| | 5 | Themes have been checked against each other and back to the original data set. |
| | 6 | Themes are internally coherent, consistent, and distinctive. |
| | | |
| ***Analysis*** | 7 | Data have been analysed - interpreted, made sense of - rather than just paraphrased or described. |
| | 8 | Analysis and data match each other - the extracts illustrate the analytic claims. |
| | 9 | Analysis tells a convincing and well-organised story about the data and topic. |
| | 10 | A good balance between analytic narrative and illustrative extracts is provided. |
| | | |
| ***Overall*** | 11 | Enough time has been allocated to complete all phases of the analysis adequately, without rushing a phase or giving it a once-over-lightly. |
| | | |
| ***Written report*** | 12 | The assumptions about, and specific approach to, thematic analysis are clearly explicated. |
| | 13 | There is a good fit between what you claim you do, and what you show you have done - i.e., described method and reported analysis are consistent. |
| | 14 | The language and concepts used in the report are consistent with the epistemological position of the analysis. |
| | 15 | The researcher is positioned as active in the research process; themes do not just "emerge‟. |

(Source: Braun and Clarke, 2006)

An alternative set of criteria was adopted by Lincoln and Guba (1985) to ensure the trustworthiness of qualitative research, namely credibility, transferability, dependability and confirmability (Shenton, 2004). I have adopted from Shenton's (2004) study the following set of actions in order to address each trustworthiness criterion described below in table 4.8.

**Table 4.8 Techniques to Ensure the Trustworthiness of Qualitative Research**

| Quality Criterion | Provision made by researcher |
|---|---|
| ***Credibility*** | Adoption of appropriate, well-recognised research methods. |
| | Use of "reflective commentary"<br>Description of background, qualifications and experience of the researcher<br>Thick description of phenomenon under scrutiny<br>Examination of previous research to frame findings |
| ***Transferability*** | Provision of background data to establish context of study and detailed description of phenomenon in question to allow comparisons to be made |
| ***Dependability*** | In-depth methodological description to allow study to be repeated. |
| ***Confirmability*** | Admission of researcher's beliefs and assumptions<br>Recognition of shortcomings in study's methods and their potential effects<br>In-depth methodological description to allow integrity of research results to be scrutinised. |

(Adapted from: Shenton, 2004)

The next section describes the context of the study, that is the GCC countries.

## 4.5 The Context of the GCC Countries

I have chosen the GCC countries as the context of my research for several reasons. As the region discovered oil which resulted in the accumulation of wealth that meant the need for foreign low and highly skilled employees in all the sectors of the economies (Biygautane and Al Yahya, 2014). Such demand for a foreign working force was intensified by the preference of locals for job positions in the public sector due better wages, security and to their limited qualifications to work in the private sector (Ibid). As for the attraction of foreign employees to the GCC countries that was due to tax free salaries they are offered (Finglobal, 2017) and the level of security and safety they enjoy in the region (Gulf news journal, 2015). As a result of the demand for foreign work force and the appeal of the GCC countries for expatriates the immigrant population rose from 8 to 10 million from 1990 to 2000, then spiked to 20 million in 2010 and 25 million in 2015 (UNDESA, 2017). As a matter of fact, the percentage of foreign work force in the employed population in the GCC countries is among the highest in the world with an average of 70.4 per cent (International Labour Organization, 2019).

In a new survey there is a consensus among 70 per cent of HR professionals regarding the lack of talented leaders to guide their organisations into the future (Korn Ferry, 2018). But in spite of the fact that a large number of MNEs operate in the GCC countries, only few studies are published on the experiences of expatriates in this region (Baruch and Forstenlechner, 2017). Moreover, a contradiction that emerged from the literature is that although there is a fierce competition between firms in the region to acquire talented expatriates and the region falls behind in talent management processes (Sidani and Al Ariss, 2014), research findings suggest that firms in the region do not invest in training and development of SIEs (Rodriguez and Scurry, 2014; Stalker and Mavin, 2011; Tahir and Ertek, 2018) and that organisations are managing poorly this culturally diverse work force (Al Ariss and Guo, 2016).

All aforementioned arguments make the GCC countries a unique context beside being also a challenging destination for expatriates to adjust as conservative Islamic societies, and its political, business and social distinct environment. Hence, my study's aim to explore the suitability of SIEs managers to learn and develop GLC in the context of the GCC countries in order to replace CEs as a talented pool of expatriates. As a consequence, that would have practical implications on HRD professionals in the selection, recruitment and retention of SIEs.

## 4.6 Conclusion

This chapter detailed the rationale of my research methodology approach. After the introduction of my philosophical underpinnings in the form of phenomenological interpretivist, the data collection through the use of critical incident interviews was discussed. Thematic analysis was then reviewed as my data analysis methodology and finally the context of te study was presented. The next chapter presents the analysis of the critical incidents interviews that I carried out with the thirty subjects.

# CHAPTER 5

# Research Findings

## 5.1 Introduction

This chapter describes the subjects' reflections on living and working in the GCC countries. It delineates five key themes with regards to how SIE managers developed global leadership skills during working experience in the GCC countries. The first theme identified focuses on the experiential learning challenges faced by the subjects at work and in everyday life during their IAs within the GCC countries. The second theme maps the subjects' reflections in making sense of each incident they faced. The third theme outlines the subjects' learning from mistakes and making attributions. The fourth theme revolves around the most important global leadership skills demonstrated by the SIE managers during their assignments in the GCC countries. As for the fifth theme, it displays the adaptation of SIEs in the GCC countries.

The first section below provides preliminary information on the GCC countries as a working destination for expatriates. The SIEs' motivation for accepting an assignment in this region are discussed in 5.1.2 and the challenges they confronted are delineated in section 5.1.3. After the scene is set in section 5.2, sections 5.3 to 5.7 provide reports on my five themes.

### 5.1.1 The GCC Countries as an Expat's Destination

The GCC countries are considered to be a tough location for expatriates to live and work in. As a matter of fact, in three global expat reports, GCC countries were ranked unfavourably as destinations for expats. The InterNations Survey in 2016 ranked three GCC countries in the bottom ten: Qatar 60th, KSA 63rd and Kuwait 67th. The UAE was ranked in 40th place. In the Brookfield Global Mobility Trends Survey 2016, the KSA and the UAE were in the list of countries with greatest challenges for expatriates and their families. Lastly, in the HSBC Expat Explorer Report 2016, the UAE was ranked 12th, Qatar 29th, Saudi Arabia 31st and Kuwait 35th. This is mainly due to difficulties of adjustment to the culture, family aspects and bureaucracy. It is worth noting that all six GCC countries had a top ranking regarding the subcategory of economics (HSBC report, 2016), which is due to the tax-free salaries and good benefits offered to highly skilled expatriates.

### 5.1.2 Motivation to Work in the GCC Countries

Although the Gulf region is a challenging location in which to work and live for expatriates it is a popular destination for high- and low-skilled expatriates for financial reasons. The main pull factor for the majority of the 30 SIEs I interviewed was the tax-free salary and benefits they were offered. The following statement is indicative:

> *Yeah. I think the decision was money, actually. They wrote a figure down on a sheet of paper and I said, 'Yes, I can do that.'...I think, in fairness, people are working in the Middle East because of the tax-free good salaries.* (Interviewee 15).

As for the main push factor, for most SIEs it was the bad state of the economy in their home countries. As a matter of fact, most of the interviewees decided to relocate after the global financial crisis in 2008. For example, the following was expressed by an Irish subject who used to work in the construction sector in Ireland:

> *I joined an engineering company in Ireland, and I came in as the managing director. And I would still be there except for the construction crash/property crash in Ireland. Very happy there, fulfilling that role, it was absolutely fantastic. There weren't any other similar roles in Ireland available to me, so when I moved it was predominantly to get a job where I could… I didn't want to go make a retrograde step. I wanted to get a job that was equal to or better than the position I was in. I explored Canada, Australia and the Middle East. And then after about six months, I settled on the Middle East.* (Interviewee 8)

Another subject from the UK, an architect, said the following about the economic situation back home: "The work had started to diminish because of the economic depression, I suppose. So, then I thought it was time to start looking for an alternative source of income.'' (Interviewee 10). A fourth subject, a Canadian national working in the banking sector in the USA, decided to accept a job position in the KSA for the same financial reasons as quoted below:

> *...after 17 years at a bank, they were either offering, you know, mega downsizing, financial crisis. And it was either take a job that was a lesser one than I was accustomed to or take severance. So, what happened was when I ended up meeting the people at Saudi Investment Bank through this head-hunter who was doing this search, my view was, 'I'll take this role.* (Interviewee 18)

The majority of the interviewees in my study pinpointed that their job back home was affected by the global financial crisis. Most of them were over 45 years old and had a family. It was evident during the interviews with SIEs that securing a job after the global financial crunch in 2008 was a priority in order to fulfil their financial responsibilities. For example, one of the Irish subjects working as Operations manager in the KSA declared the following;

> *Well, to be honest, the financial thing was a big driver because, as I said, I have a family. We'd a large house in the country. Yes, we needed to be working. My last job in Ireland, I was doing van deliveries because I had several vans of my own, and I was also a bouncer in a casino in Athlone, which was not suitable, but I needed the money. I'd do anything I had to earn enough money to keep my family going. It was that.* (Interviewee 27)

Although oil prices have dropped significantly, expatriates in the GCC countries are considered to have one of the highest disposable income in the world (HSBC report, 2016). This fact was confirmed for example by Interviewee 9: *"My main driver coming out here was to get an income, as opposed to the actual saving money".* Further confirmation of this factor came from Interviewee 20 whose motivation to extend his stay in Bahrain after spending two and half years in the KSA is to save more money: *"...and if I can get another year in and get the finances a bit more stabilized, that I would feather the nest a little bit".* This finding differs from Inkson et al (1997) and Doherty et al (2011) whose research results state that SIEs' primary motive was that of adventure. As a matter of fact, the most important reasons for SIEs to move abroad in the current study were to achieve career-related targets and to escape from the repercussions of the financial crisis back home that started in 2008.

Besides monetary considerations, some secondary motives for embarking on IAs in the GCC countries were also mentioned by the SIEs. For example, wanting a new challenge. That was the case for Interviewee 28, who was working in the banking sector in Sri Lanka. He moved to Qatar as he was motivated by *"the* *challenge to work in a different country"*. As for Interviewee 11, she had 12 years of work experience in the UK in HR positions in a "male dominated" environment and was looking for "*a fresh challenge… and a whole new experience*".

Another motive of SIEs for accepting an IA in the GCC countries was to develop further their career and gain more skills and knowledge in various different or higher-level roles than previous ones. For instance, after spending 35 years in the British army, Interviewee 1 accepted a new role as Strategy Advisor in a large public hospital in Qatar. As he alluded to, his goal was *"to develop my knowledge and skills in a different way, in a different context"*. As for Interviewee 26, having many years of experience in the Irish banking system, he accepted his role as a transformation advisor in a Saudi bank due to *"the seniority of the role and the level at which I was reporting was also very attractive".* Moreover, Interviewee 29 moved to the KSA as an industry director in a German multinational because *"I wanted to go back to a multinational environment, and a more technology environment as opposed to typical banking because I felt that I would grow there better...because it's a big market".*

Only a few SIEs referred to being curious to learn about other cultures and look for a new adventure as a reason to move for an assignment in the GCC countries. For instance, Interviewee 22 moved to the KSA to work as Sales Manager in a dairy industry in the desert because, as he pinpointed: *"I was fascinated by that. Also, I wanted an adventure. I like different cultures. I like a pioneering spirit, a sense of adventure"*. As for Interviewee 2, as an experienced healthcare leader in Canada, she moved to work in a public hospital in the KSA because she wanted to: *"learn a little bit more about different cultures and understanding the Arab world".*

The next section outlines the various challenges experienced by SIEs while working and living in the GCC countries. These challenges were grouped in two categories, namely the multicultural factors and the environmental and organisational factors.

### 5.1.3 Encountered Challenges by SIEs in GCC Countries

Nearly a quarter of interviewed SIEs described their immersion in the culture of the GCC countries as a "cultural shock". This is mainly due to the stark differences between the Western culture of mostly European interviewed SIEs and the Arab culture in the GCC countries. Interviewee 7 from Ireland, working in the banking sector in the KSA, comments as follows on his first few months in the country:

> *So, the first few weeks would have been very much a little bit of a culture shock, because you genuinely are depending on people to survive. Finding your way around, getting in and out of work, traffic is horrendous. Getting your way around the organisation, getting your data organised to the way it should be. So, you're very dependent in the first number of weeks and months, very dependent. You obviously start to build relationships very slowly. Find your feet. Begin to feel your way around. Grow into it. Patience is a key virtue and hard work without having the full picture. Communication is difficult, obviously, without having their first language. Personalities can be different, but that's the same with any job in any country. You really learn about the whole concept of loneliness. You miss your family and friends. But that's a phase that you go through over the first three to four months, whereby it comes and goes, but then you get into a routine around that.*

On the other hand, SIEs from an Arab country did not describe their immersion in the local culture as a cultural shock due to the similarities between various Arab cultures. As mentioned by Interviewee 30 from Egypt working in the construction sector in the UAE:

> *…it's the same culture. It's an Arabic country, Muslim country. I found the mosque, halal food everywhere, of course. So, it was for me no difference. Nothing.*

SIE interviewees identified a range of challenges they had to face while living and working in the GCC countries. One type of challenges encountered by the subjects was related to multicultural interactions and a second type was related to environmental and organisational factors. It is worth pointing out that all challenges identified took place at an organisational level, not at a personal level outside the workplace. Moreover, several SIEs mentioned, "entering into the culture of the country was easier than the work culture" (Interviewee 4). That might be the case because SIEs usually live in compounds shared with colleagues from the same country. So, for example, most of the Irish SIEs in the KSA lived in shared compounds, which made their adjustment outside work easier.

Challenges related to multicultural interactions were mainly linked to the different cultural background of the SIEs in relation to the “glocal” cultural background in the GCC countries. Some of these challenges were referred to by the respondents more often than other challenges. In addition, some challenges were described as serious and intense whereas other challenges were reported as less severe, but nonetheless challenges.

The below section outlines the challenging multicultural factors reported by the SIEs and environmental and organisational factors.

#### 5.1.3.1 Multicultural Factors

The main multicultural challenges identified by the respondents were the following:

a. Lack of tailored communication skills: The most cited challenge by SIEs refers to the difficulty they had in spoken (using broken English) and written communications (emails) and in nonverbal communication (body language) with local and foreign employees.
b. Lack of cultural understanding: Refers to the lack of knowledge and awareness of the Arab/Islamic local culture and the many other diverse cultures of expatriates working in the GCC countries.
c. Adequate strategies for local needs: Make reference to the use of strategies suited to the local culture instead of “importing” ready-made strategies from back home.
d. Having high expectations: Alludes to the effort to set the same high standards of work ethics as in the home country without taking into consideration how things are done on a local level.
e. Dealing with patriarchal/authoritarian style directors: Refers to managing the difficult relationship in many cases with local or Arab directors due to an authoritative leadership style. This leadership style accords with the Globe findings regarding the high rate of power distance in the Arabic cluster (Kabasakal and Bodur, 2002).
f. Building trust: Pertains to being seen as a trustworthy and paternalistic leader by local and foreign employees.

g. Employees' layoffs: Refers to the difficulty faced by a SIE in dismissing employees within an Islamic culture that fosters paternalistic leaders protecting their employees' job positions.
h. Being a guest: Touches on the difficulty for an immigrant in general to acquire local citizenship. Hence, they are regarded at work as guests who will be leaving sooner or later. This situation leads to a feeling of uncertainty and insecurity among the expatriates about their future in current jobs, as employers have the upper hand in terminating a work contract (Naithani and Jha, 2010).

In table 5.1 below are quotes as examples of each multicultural factor disclosed by the SIEs.

### Table 5.1: Examples of Multicultural Factors

| Multicultural Factors | Quotes as Examples |
|---|---|
| **Lack of tailored communication skills** | *"Ability to express yourself. If you are not able to express yourself to the diverse people around you, and when I say 'express myself' you need to be able to express yourself both in written and verbal and body language. All three of the above. If you are not able to do that here, you won't really be able to grow, as such".* Interviewee 29 |
| **Lack of cultural understanding** | *"I've worked across the UK, I've worked in London. So, I thought I had an idea around diversity. But nothing would have prepared me for such a transition to such a conservative Muslim country".* Interviewee 4 |
| **Adequate strategies for local needs** | *"They want you because you have the experience, and to translate that into a local flavor, not to try to come and replicate the way you did things in New York because that's never going to work".* Interviewee 18 |
| **Having high expectations** | *"This is a different society, it's a different culture. It's not that people are worse or that. It's that your expectations are too high".* Interviewee 12 |
| **Dealing with patriarchal/authoritarian style directors** | *"The local work culture is that employees are very respectful of the boss and the boss can be tough on them, maybe unfairly so".* Interviewee 3 |
| **Building trust** | *"I think any manager, if he's coming down here, and his responsibility is people management, the first and foremost thing that you need to do is to reach out to these people and you have to make them feel very comfortable that they can trust you".* Interviewee 29 |
| **Employees' layoffs** | *"If you have a company and it's a successful company and it's going well, it is not part of the cultural ethos to fire people. It's not Islamic".* Interviewee 22 |
| **Being a guest** | *"In the Middle East we're always a guest, you are never part of the society".* Interviewee 25 |

#### 5.1.3.2 Environmental and Organisational Factors

The second type of challenges SIEs had to confront are related to environmental and organizational factors. That is challenges that are environmental and organisational-specific, linked to the political, economic and societal environment.

The main environmental and organisational-factor challenges mentioned by the 30 interviewees are the following:

a. Aversion to change management: One of the most cited challenges within the environmental and organisational factors refers to resistance to change on the part of local and foreign managers and employees.
b. Political/ social/economic environment: Relates to the Islamic traditions and rules and restrictions, as well as policies regarding nationalisation of many job positions, quotas implementation in hiring local employees, salary discrimination in favour of Western expatriates and wasta. In addition, the plummeting of oil prices resulted in the difficulty of many companies to pay their suppliers.
c. Internal cultural diversity in organisations: Alludes to the large number of nationalities to deal with as a SIE leader within specific sectors such as construction and healthcare in the GCC countries. It was mentioned that, for example, in some hospitals or construction companies more than 70 to 80 nationalities were employed. Moreover, the majority of employees in the private sector are foreign nationals (Naithani and Jha, 2010). That is due to the better qualifications and experience of expatriates in comparison to the local workforce, as well as their need for less training to learn and adapt to the new job, their willingness to work longer hours and a lower percentage of absenteeism (Ibid).

In the below table are quotes as examples of environmental and organisational factors mentioned by the SIEs.

**Table 5.2: Examples of Environmental and Organisational Factors**

| Environmental and Organisational Factors | Quotes as Examples |
|---|---|
| **Aversion to change management** | *"There is still some resistance, and there is still a certain amount of chasing up and saying to the guys 'What did you do last week? Which projects were you working on last week? What did you produce last week? But there is a little bit of resistance still, getting it out of them"*. Interviewee 16 |
| **Political/social/economic environment** | *"Kuwait had salary bands, which was great, but it was the starting point of salary, depending on whether they came in with a British passport for example or a South African or Indian passport. And for me I found that totally incomprehensible. Totally unacceptable. It gave me really a hard time. It was hard for me to internalize that"*. Interviewee 11<br><br>*"But we don't have the option here because you have to hire, and you have to recruit, and you have to work on increasing the percentage of locals in your bank or organisation. You have a pressure here to do this"*. Interviewee 23<br><br>*"But that's very difficult ethically from a western mind-set because I was brought up in a very strict organisational culture where bribes (I know bribe sounds a very hard word, but fundamentally that's what wasta is, who you know, what you know, and you pay a little bit of a wasta budget to get that done). So ethically that was a challenge for me"* (Interviewee 11) |
| **Internal cultural diversity in organisations** | *"You know, we've Hindus, we have Buddhists, they are all here. Everybody is here. And they've all got their own ways and wants. And wow, it can be a minefield at times"*. Interviewee 27 |

This section provided a contextualisation with regards to the GCC countries and outlined SIEs' motives for accepting an assignment within the GCC countries and the challenges they tackled during their working experience.

The next section sets the scene by defining the five themes that emerged from the data analysis and are the basis of my theoretical model.

## 5.2 Setting the Scene

Five main themes emerged from the thematic analysis of the interviews with the SIEs living and working in the GCC countries. The five themes are linked to the experiential learning from the challenges confronted by SIEs and their adjustment to the new environment. My voice, as the researcher, is reflected in the interpretation of the critical incidents the SIEs outlined and an appreciation of how they made sense of these incidents.

Theme 1. Triggered incidents. *"The most challenging cultural experience that I've had to handle is a young lady that had arrived the same time with me".* (Interviewee 4). Theme 1 focuses on the triggered incidents tackled by the subjects at work within the GCC countries during their assignments. Several subjects have described working in the region as a cultural shock. For some other subjects that was not the case. I will include some triggered events described by subjects and explain the reasons behind it.

Theme 2. Cultural sensemaking. "*I realise a pattern, that this is consistent, and I have to rectify myself".* (Interviewee 26). Theme 2 maps the subjects' reflections about what exactly went wrong in each incident and what they realised was the right cultural behaviour according to the local culture.

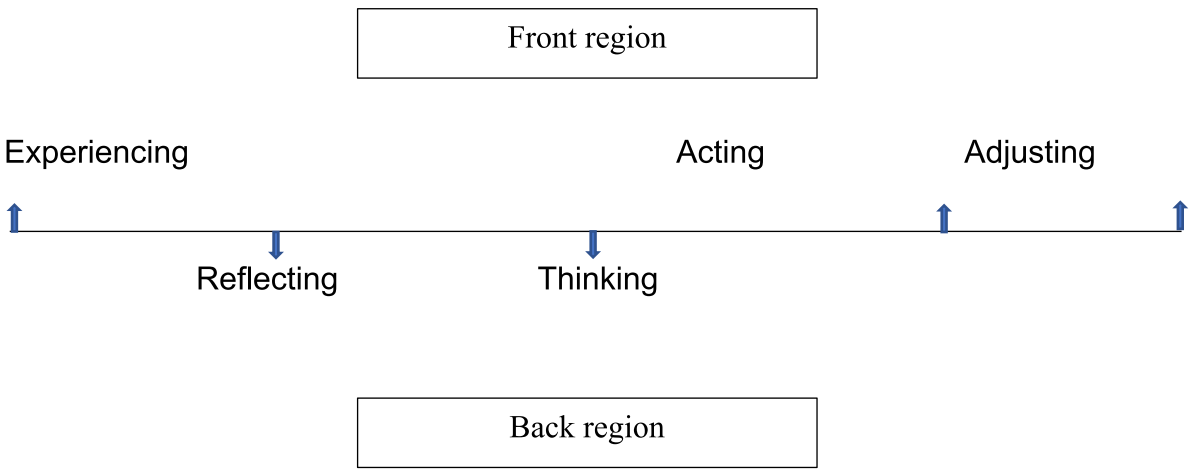
Theme 3. Learning from experience. "*This has been a very valuable learning experience. This is a difficult environment, in which to get things done".* (Interviewee 1). Theme 3 outlines the subjects' interpretations of their lived experiences and learning from each challenge and make the right attributions. SIEs can have similar experiences but the learning can be different for each one of them.

Theme 4. Displayed global leadership skills. "*Leadership is all about identifying the style of communication or the makeup of the people you're working with and trying to bend and flex*". (Interviewee 10). Theme 4 focuses on the most important global leadership skills developed and displayed by the SIEs managers during their IAs. Lack of some skills will also be discussed. In addition, I will discuss which skills are considered crucial within the GCC countries according to the subjects.

Theme 5. Adjustment to the new culture. *"It took me about a year, I would say, to acclimatise to the change*". (Interviewee 2). Theme 5 emphasises the adaptation of SIEs in the GCC countries in everyday life, at work and in having a good rapport with local colleagues.

Figure 5.1 below depicts my findings five themes which includes the four stages of experiential learning and the fifth stage of cross-cultural adjustment. It is worthy of note that the learning cycle of experiencing, acting and adjusting take place in the front region whereas reflecting and thinking occur in the back region.

**Figure 5.1 Findings' Five Themes**




The next section delineates the first theme regarding the triggered incidents that SIEs experienced during their working experience in the GCC countries.

## 5.3 Report of theme 1: intercultural Triggered Incidents (experiencing)

A trigger experience is viewed by Gardner et al. (2005 cited in Reichard et al, 2015, p.8) as "negative or traumatic in nature". As a matter of fact, the majority of the critical incidents shared by SIEs during the interviews were described as negative experiences. But as noted by Hall et al. (2001 cited in Ng et al, 2009, p.512) “failures during IAs can present excellent learning opportunities that help individuals hone their global leadership skills”. Challenging experiences including the unpredicted, complications, unfamiliarity, constraints and high interests have the potential to be an excellent experiential learning (McCall, 2010). Such challenging experiences for managerial learning include dealing with unfamiliar responsibilities, fixing inherited problems, handling problematic employees, managing work with high stakes, managing a job with large scope and scale, taking new directions within the business, facing external pressure, exerting influence without having authority and working with people from diverse cultures and ethnic backgrounds (McCauley, 2006). As my focus within my theoretical framework is on Kolb’s Experiential learning theory, the first theme will be reporting on the concrete challenging experiences respondents shared with me during their Skype interviews.

The first common theme commented on by the respondents were critical incidents triggered by the fact that they could not make sense of or they were not sure on how to handle the situation according to the local cultural norm. Triggered events are defined by Bird and Osland (2005, cited in Osland et al., 2007, p.8) as:

> …inextricably linked to context. In the intercultural context, we view culture as a communal response to the need for simplification and uncertainty reduction. Different communities reach different answers to common questions; thus, when people from diverse cultures interact there is a large potential for misunderstanding, for gaps between the expected and the experienced.

Critical incident will be grouped in two categories, mild and extreme lived experiences. A mild cross-cultural incident is defined as a negative or positive lived experience that was solved at the end without serious consequences for the implicated company or employees. The criterion for considering an incident extreme is the seriousness of the implications for the involved company and the employees. Mild cross-cultural experiences are discussed first, and then the extreme experiences.

### 5.3.1 Experiencing Mild Critical Incidents

One such triggered incident was described by Interviewee 3, an Irish national SIE working in the banking sector in the KSA. He was puzzled as to why his Saudi colleagues were upset and not talking to him as a consequence of comparing their conduct to his wife's behaviour. That was the case because he had ignored the fact that Middle Eastern societies are high on the masculinity dimension (Hofstede, 2001) and in the male-dominated culture of the KSA it is considered an insult to compare a man to a woman as men are considered to be strong and tough whereas women are portrayed as soft and weak. Hence, men would be proud of their masculinity. The interviewee behaved as he would have behaved in Ireland, a society that would be low on masculinity. Hence, he considered his remarks as a "joke". The following comment describes Interviewee 3's bewilderment as to the reasons his Saudi colleagues were not speaking to him for two weeks.

> *I was moving into a new office at one stage. So, the guys were helping me with the equipment and furniture. And two locals were helping me. I couldn't understand why these people were offended. But, eh, they changed my chair three times. And when they were taking it away the third time, I said to them, you remind me of my wife, you keep changing things. And actually, it turned out, I only found out one or two weeks later, that they were very very very offended, because they thought I was calling them females…And I was just joking, you know the way the Irish joke. I was just having fun. And actually, they didn't talk to me for two weeks, and I didn't know why. So, then they wouldn't tell me why they were annoyed. They said 'oh, you offended us, you will know'. So, it took me two weeks to work out what had gone wrong. So of course, I just apologised*. (Interviewee 3)

Several such critical incidents were experienced by Western SIEs due to the unknown nature of the Islamic culture in the Gulf societies. That is so because Westerners struggle to realise the degree to which Islam penetrate all facets of Arabs' life (Hall, 1990). This triggered incident could be described by the term "culture bump" (Archer, 1986) which is defined as: "a phenomenon that occurs when an individual has expectations about another person's behaviour within a particular situation but encounters a different behaviour in that situation when interacting with an individual from a different culture" (Archer and Nickson, 2012, p.335). Hence, the confusion of the Irish respondent in the previous triggered incident which stems from taking as a given the equality between men and women as learned within the Irish society, which is not the case within the Saudi society. It is worth noting that this was the respondent's first assignment outside Ireland.

Thus, a lack of exposure to Arab cultures coupled with lack of cross-cultural training might explain his behaviour.

A second triggered incident similar in nature was discussed with Interviewee 4, a British national SIE who worked in a Qatari public sector hospital as a director of health information management. As a newcomer she did not realise that since women had a separate office from men, a man could not violate that privacy. What happened in this critical incident was a result of leaving a new male colleague alone with a Muslim female colleague in the same room. This meant a lack of respect for women's privacy in the local culture. In the quote below it is evident that her ''culture bump'' (Archer, 1986) was being unaware of the cultural Islamic norms in Qatar as she was not sure what went wrong because she assumed that men and women colleagues could share the same office as would be expected back home in the UK:

> *And I just didn't know culturally that I'd done something wrong...But that was probably the most difficult thing I've had to deal with, because I had to take her to one of our executive directors, who was Qatari luckily as well, and sift through the whole situation. So, it was more not understanding if I'd broken a cultural norm or rule. And that was the worst thing, because it got escalated so very highly. And in the end, security was involved. He was removed from the premises. The member of staff was threatened, he was threatened with violence, because he was British Muslim man that was working with us. So, it was very difficult to manage. And it went on for a good six months afterwards because of the heightened feelings about the situation.* (Interviewee 4)

The next trigger incident can be described as a form of surprise, defined as follows: "Surprise results when the newcomer relies on cultural assumptions brought from previous settings as operating guides in a new setting, and they fail" (Louis, 1980, p. 238). That is what happened with Interviewee 29, an American SIE with roots from Pakistan and working in a German multinational in the KSA as head of financial services. He was taken by surprise when his Arab colleagues were embarrassed and complained about his straightforward feedback in front of other colleagues which would be totally acceptable in American or Northern European business etiquette but not in the Arab world. That was the case for Arabs in general, in what is a collectivist culture in which it is vital to fit in harmoniously and save face (Adler and Gundersen, 2007). Thus, the need to be tactful when giving negative feedback, which the respondent interpreted as "sugar coating". But as Interviewee 29 outlined, his disrupted thinking due to cultural differences made him assume that he should behave as he had learned back home in the USA:

> *You see, I grew up in an environment where, you call it exactly as it is. You don't sugar coat it, you don't undercoat it, you just say it the way it is, and you expect the other people to be a good sport about it, take it constructively and actually give you the same feedback whenever you need it. I realised in the first few months that it requires much more sugar coating in Saudi, especially to give feedback to somebody, especially if the feedback is not really all positive and it can only be taken constructively if it's given in a very blurred, open environment. It has to be done privately, cannot be done in front of other people because the egos start to be a short temper. And although the person will accept your feedback openly, if you've given negative feedback, the person will not take it constructively and will actually not say it in your face and will keep it inside and actually blow it into a negative energy...I did not see this problem with the German colleagues, or the American colleagues, or other colleagues from the UK. I didn't see it at all. Also, I thought that they were on the same wavelength as me. I did not see this problem with the Indian colleagues that I have. I particularly felt it with the folks in the Arab world...the first time…I offered my advice, the person was silent, said, 'Yes, I agree with you' and I actually thought that the conversation was over. But I got approached by him later on and he said, 'Look, you know, I didn't appreciate that you exposed my weaknesses to people, members of the project team.'* (Interviewee 29)

In contrast with the previous respondent, Interviewee 6, a Greek SIE working on his second assignment within Saudi Arabia as a consultant, had a different approach. He spent three years in his first assignment working for a Saudi Bank. That helped him to "learn the ropes" within the new environment, a process that can take 6 to 10 months (Louis, 1980). Hence, he was already adjusted to the local culture and was self-aware on how to interact with local colleagues. Moreover, there are more commonalities between Greek and Middle Eastern cultures. That is the case as Greece was a colony of the Ottoman Empire for nearly 400 years. As both cultures belong to the collectivism dimension (Hofstede, 2001), a common behaviour would be the avoidance of embarrassing a colleague by putting pressure or pinpointing his/her weaknesses in front of others. As a result, he avoided the "culture bump" by asking in a polite way his local colleague to deliver a pending report. It is worth noting that the polychronic cultures of the GCC countries "often place completion of the job in a special category much below the importance of being nice, courteous, considerate, kind and sociable to other human beings" (Hall,1989, p.150). The following quote outlines Interviewee 6's knowledge on the local culture:

> *I was landing myself in a position that was a bit senior for my age, and I had to deal with a completely different culture at work…but it's a culture that you don't want to be very strict and very tough, because they can be very offended and that can really fire back quite a lot. So, you need somehow to find a balance between getting things done and not offending and not pushing too much. While doing it in a smart and the right way…But in general, Greek culture has some similarities with the culture here, and perhaps it was a little easier for me to find this balance than some other people.* (Interviewee 6)

In many challenging situations the root cause had to do with the SIEs lack of cross-cultural communication skills. That was the case with Interviewee 25, a Greek SIE working in a shipping company in Qatar as head of planning and analysis. He had, as he described it, a *"total communication breakdown*" with an Egyptian colleague at work. The job description of both was overlapping but the lack of communication might have been caused by the Islamic religious beliefs of the Egyptian co-worker. For example, he assumed that anyone who drinks would be an alcoholic. The Greek SIE struggled to find common ground with his colleague, maybe due to lack of knowledge of Islamic culture. The following statement is indicative of the lack of cross-cultural communication:

> *We report to the same director. He's from Egypt. We're having total communication breakdown. Like, total. There is no – I think it's very, very negative. We come from totally different backgrounds. For me, some things he says are crazy…I don't know what's the expectation. He would consider anyone that drinks is an alcoholic by definition. And, ok, that's not the case…We both have tried, to be honest. But we cannot find a common area of understanding. It's impossible. The cultural bridge, it's impossible to establish. There is also a conflict of interest because jobs are a bit conflicting. We have some overlaps. But there is a total communication breakdown. I have found it very, very challenging to work with him. I think maybe it's a cultural issue…When I say something, he'll say something totally different to what I said.* (Interviewee 25)

The next challenging situation concerned the lack of nonverbal cross-cultural communication from the Lebanese SIE working in Qatar as a senior consultant at one of the big four accounting firms. He was not sure how to greet a local woman in Qatar. That would be the case because nonverbal communication used between men and women varies among Islamic Arab countries. So, for example, in the more conservative GCC countries greeting a local woman by handshaking is not an option in most cases. The opposite would be true in Lebanon or Tunisia, which are more open and Westernised Arab countries. The following quote shows the puzzlement of the Lebanese SIE as to how to greet the local woman:

> *…we had to meet a female local manager here, and you don't know what to do, whether to shake hands, whether to stand up, whether to address – You don't know this stuff because we are not used to this. So, this was one experience of mine. I tried to copy what the others were doing but even they did not know what to do.* (Interviewee 19)

In some critical incidents the reason behind the challenging situations was the initiative of the SIE manager to bring change to the status quo within the company. As a result, that would lead to a clash with the local and foreign employees who were clearly not happy with such change-management initiatives. That was the case encountered by Interviewee 16, an Irish architect in the KSA, leading a team of foreign architects in a Saudi construction company. On this occasion the SIE initiative was to bring a new culture in the company by assessing the time spent by each architect working on each project. This kind of supervision had a negative effect on the Indian and Filipino employees as for the first time they were scrutinised regarding the amount of work they were putting into each project. As described by the SIE, such assessment had the effect of a “bombshell” on the employees. The quote below outlines the challenge experienced by Interviewee 16:

> *Like, for example, in our company when I arrived, they were just doing projects, they were put in a price, they put a big, big markup on what they expected – and, to be honest, the profit margins were quite huge. When I came here, I wanted to do an evaluation of that, I wanted to check it as to the times that people would spend on specific projects. So, one of the first things I did when I came here was, I insisted that all the guys did timesheets. They recorded the times in which they work on very specific*

*projects. The effect it had in the office was like a bombshell because the Filipinos, the Indians, all looked at that as if I was – how would you put it – checking on them, making sure – Where they would have been just quite happy just work away without having to sort of say, 'I worked on this project in so many hours, I worked in this project...' So, they felt as if they were under pressure.* (Interviewee 16)

One of the challenges confronted by SIEs was managing local employees. This challenge stemmed from the reluctance of the Gulf nationals to be managed by "foreign" SIEs they regarded as temporary guests. The problem was exacerbated in some cases as local CEOs were encouraging such behaviour from local employees. That was the case with Interviewee 12, an Irish SIE working in a large hospital in Qatar as Assistant Executive Director. He had had to encounter such a situation in his previous assignment in the KSA. It was challenging to build a good relationship with all local employees reporting to him as the Saudi CEO was endorsing the employees' behaviour. The following statement demonstrates this challenging case:

*I came into a situation where I was the executive director for administration. I had seven directors reporting to me. Three of them were no problem. One was invisible. And the other three were major problems. And the major problems were because I was a Westerner and I was temporary – as in I wasn't a Saudi, I wasn't a Muslim, I wasn't permanent there. And they went around me – and it wasn't just me, it was my predecessor as well who was American – and went to the CEO. And found this very difficult to cope with because my CEO is telling me I'm responsible for delivering results on these particular services through them, while he's entertaining them through the back door. And I found it very difficult to build a positive relationship with them and with him.* (Interviewee 12)

Interviewee 25 a Greek SIE working as head of planning and analysis in a shipping company in Qatar was knowledgeable about the fact that it was a challenge to keep locals motivated by their job and emphasised their repugnance for minor tasks. The following quote demonstrate his knowledge:

*…for Qataris, you need to keep them more motivated and more interested in the job. It's a challenge. You need always to find something for them to be interested in. Mundane stuff they will not take well and would probably give you poor results.* (Interviewee 25)

The reason for being well informed in this case of is that both Greece and Qatar belong to the collectivist cultures. Hence, Interviewee 25 could decipher the local culture and behave accordingly. As he acknowledged: *"I couldn't say I faced any significant issues, you know. It's a different culture, not so different to Greece. So, I would say it was quite easy".*

It is worth mentioning that Interviewee 25 was on his first international assignment. But he managed well the local and foreign employees as he understood the local culture due to similarities with Greek culture.

The next section discusses two very challenging and negative critical incidents confronted by the SIEs while working in the GCC countries. The consequences of these situations were severe for the company and the employees involved.

### 5.3.2 Experiencing Extreme Cases of Critical Incidents

Shocking extreme incidents for a Western SIE are context-related in that such incidents would have been avoided in a developed country due to the strict laws and policies put in place within organisations. Although the selected interviewees had a broad repertoire of skills and knowledge due to many years of working experience, in the two incidents discussed here SIEs were caught off guard as they did not experience such challenging situations back home.

Interviewee 27, an Irish SIE, was working in the KSA for a foreign elevator manufacturing company as an operations director on large projects. He was responsible for 700 engineers working in sites all over the KSA. He encountered an extreme and negative critical incident as two of his engineers were killed in a lift in one of the construction sites. The reason these two engineers were killed was that they did not follow the safety processes put in place. The comment below gives an insight into this serious incident:

> *I was sitting in the office in Riyadh one day and I got a phone call to say that there had been a serious accident in one of the ministry buildings here. So, we were working for the government. Big, serious implications. I went straight to the site and knowing previously that what would happen in UAE, the senior manager would be immediately arrested and brought in and questioned and kept for a minimum of 24 hours, maybe a week, depending if they felt there was any criminal charge to be brought against the*

*company. So, I went straight to the site to suffer my consequences. I went to find out what happened. I went obviously to be there with the rest of the engineers on site, to let them see they weren't on their own. It was one of the traumatic experiences of their life. And, again, it was the skill levels of the engineers that were killed. They killed them-bloody-selves, really…They didn't follow the safety procedures…Definitely a negative. Probably the biggest traumatic, I have to say, day. Obviously, this went on for weeks but the day itself was absolutely shocking.* (Interviewee 27)

Interviewee 27 describes this extreme incident as "traumatic" and "shocking" because a Western SIE would not have dealt with such a deadly accident back in Ireland due to the precautions taken on a construction site. This clearly is not the case within the context of the GCC countries, as shown for example by the number of deaths of foreign construction workers in Qatar (Human Rights Watch, 2017).

The second severe incident was discussed with Interviewee 16, an Irish SIE working in the KSA in a construction company as a design manager. He was leading an international team of 50 architects.  Two employees of the team, a Filipino and a Saudi architect, did not have the best of relationships between them. The situation was aggravated when the Saudi punched the Filipino at the office and the Filipino reciprocated. At that point the SIE manager had a meeting with both of them in his office to calm them down and solve the problem. But instead the Saudi employee thought that he should seek appropriate justice from the Filipino according to his Islamic beliefs. Moreover, the Saudi CEO supported him in his beliefs. As a result, the Saudi employee took the matter into his own hands by beating up the Filipino colleague with the help of some friends outside of the office. The Filipino employee was terrified by what happened. Thus, he resigned and went back home. As for the Saudi employee, the company sacked him. The quote below describes interviewee 16 opinion on this serious incident:

*My opinion, after it, I think the Saudi guy was probably the gay and the Filipino guy spotted it and he was playing on that, ok? So, I had to see the guys in my office, and the Saudi guy, I said to him, 'That's it. Done deal. It's all over. Let's move on.' The Saudi guy kept quoting, like, the Quran, where an eye for an eye and he said, 'I have not got justice yet.' So, I had the guys in my office, and I said, 'Don't you threaten another person in my office ever.' And he said, 'I'm not threatening my office, but I will get justice to this guy because it is my right, as a Saudi person. I have been – whatever – and I have got a right to actually retaliate and get my back again on this*

> *guy.' So, anyway, to cut a long story short, Saudi guy, with his friends, outside the office, caught the Filipino guy and beat the crap out of him. They beat him up. Yeah…So he then came, back into my office, quite calmly said, 'I am ok now. I have been satisfied. I have taken my revenge.' So, the Filipino guy was terrified at that stage and he was quite happy to get a seat on a plane the next night, and we sacked the Saudi guy as well.* (Interviewee 16)

It is obvious from the extract that such an extreme incident could not have taken place in Ireland as the organisation's rules would prevail and both employees would be warned and sanctioned without delay. However, in this case even the Saudi manager consented that the local employee had the right to retaliate according to his Islamic beliefs, hence the difficulty for the SIE in making sense of such an unfamiliar incident.

This section has outlined two extreme triggered incidents that respondents experienced within the context of the GCC countries. These novel challenges from a cross-cultural point of view caught the SIEs off guard and prompted them to make sense of what happened.

The next section discusses theme 2: SIEs' reflection and sense-making of the encountered critical incidents.

## 5.4 Report of Theme 2: Cultural Sense-Making (reflecting)

Trigger events as noted by Osland and Bird (2000, cited in Bird and Osland, 2005, p.116) "jerk people out of routines and force them to make sense of intercultural events they do not understand". The second theme is focused on how SIEs made cultural sense of the triggered incidents they went through during their assignments in the GCC countries. First, I consider how SIEs made sense of some mild cross-cultural incidents, and then I discuss the subjects' reflections on three extreme incidents.

### 5.4.1 Making Sense of Mild Critical Incidents

Cultural sense-making takes place in the back region, where "the performer can relax; he can drop his front, forgo speaking his lines, and step out of character" (Goffman 1959, p.115). In this case SIEs do self-reflect on what went wrong in a triggered incident and many often seek advice from a host national considered as a "cultural informant" (Adler, 2008), who would be "a skilful, tactful interpreter of the culture" (Hall and Hall, 1987). In the case of Interviewee 29 discussed in theme 1, after receiving negative feedback from his Arab colleagues, he reflected and went through three steps to make sense of the embarrassing situation. He first "framed the situation" (Bird and Osland, 2005), as more than one Arab colleague complained to him about being embarrassed because he criticised them in public. Secondly, he "made attributions" (ibid) by identifying that he needed to change his behaviour when giving feedback to Arab colleagues. In doing so, he thirdly "selected a script" (ibid) which was suitable to his Arab colleagues' culture by giving his feedback discreetly in a one-to-one meeting. The following quote describes how Interviewee 29 was surprised by his Arab colleagues' remarks and decided to alter his behaviour in order to correspond to their value orientation, that is, by being tactful in his feedback:

> *And I was taken aback, and realised and I apologised, because I must respect the cultural norm. I realised that it is a cultural norm, because it is not just this person. I realise a pattern, that this is consistent, and I have to rectify myself. Now it's actually very comfortable for me to identify an issue and address it. And it actually helps me now because if I do it alone with that person, that person is willing to listen more and offer much more interactive feedback. So, it works out well.* (Interviewee 29)

It is worth noting that in this case the outcome of the intercultural sense-making was that of "pattern recognition" (Osland et al., 2007) from the SIE. Moreover, although the triggered incident took place in a subsidiary of a German multinational, American, German and British colleagues' cultural behaviour was dissimilar from Arab colleagues as stated by Interviewee 29. That reflects Hofstede's (1980) research regarding employees' cultural dissimilarities within a multinational organisation. That is, employees do not adopt the culture of the multinational, but instead display their own ethnic culture.

Interviewee 1, a British SIE working as the executive director of strategy in a Qatari hospital, confronted the same bewilderment as the Interviewee 29. Before accepting the assignment in Qatar, he had worked for 35 years in the British Army in various leadership positions. Hence, he was surprised when the directors of eight departments did not collaborate in the way he assumed they would do in order to implement a new system of clinical coding. Interviewee 1 was puzzled as "it is impossible to participate in two different patterns at the same time…a person has to stop using one in order to take up another...as patterns are anchored, when they are being learned and forever after, in the behaviour of groups and institutions" (Hall, 1990, p.152). As a consequence, Interviewee 1 reported that it took three months to "take stock" of the situation. Then, with the support of his director, he was able to tackle the situation to bring change as soon as he understood the new patterns of the Qatari culture. The quote below delineates his surprise and bewilderment, as an ex-British Army disciplined leader, about how locals executed orders:

> *And after three months, I had to take stock, it was a very, very difficult experience, because I had not appreciated that the individual managers had any sense that the system-wide implementation transcended their individual perspectives. I had simply assumed that they would understand that, and they would comply. Because the nature of my experience. And because that was the common-sensical thing to assume. So, it didn't break down, but it meant that I had to change my approach…Well, I think, where I see a success would be, the collaborative way in which we took stock (my boss and I) the currency of our new strategy of transformation.* (Interviewee 1)

Clearly, in this critical incident Interviewee 1 could not make the correct attributions (Bird and Osland, 2005) as he was influenced by his social identity and history. Hence, his matching process was irrelevant to the new context of Qatar.

Beside the procedure of sense-making to assign meaning to new information by using prior experience (Schwandt, 2005), SIEs need to use reflective observation (Kolb, 1984) by listening, observing and dealing with ambiguity (Yamazaki and Kayes, 2004). As a matter of fact, several SIEs noted that during the first few months of their IAs they were just listening during their social and professional interactions in order to make sense of what they encountered within the new culture in the GCC countries. For example, Interviewee 21 based in the KSA was quoted saying: *"You have to listen a lot. First six months, I wasn't doing any business, I was listening, learning, building up relationships. That's what it's all about"*. As for Interviewee 8, based in Dubai he mentioned that *"the first couple of months I just spent listening to be honest. I know that sounds clichéd, but an awful lot of listening. I usually find that difficult. But listening for the first couple of months* *to understand the situation…"*. Both aforementioned interviewees were Westerners and that was their first IA within in the GCC countries, hence, the novelty of many situations due to lack of experience with the new culture.

Interviewee 22, an Irish SIE with nearly 20 years of working experience in the KSA at his fifth IA at the time revealed during his interview that he seldom walked away from a discussion with locals without understanding the conveyed meaning of what was discussed. His line of reasoning was that he always listened carefully to what was said by the Saudis to make sense of what they *"really meant*". The respondent felt he had the required knowledge about the Saudi culture, therefore, he knew that locals would avoid embarrassing discussions or disagreements in order not to lose face. Consequently, as a listener he had to pay attention to the contextual indications in order to comprehend the whole significance of the message (Zaharna, 1995), in order to achieve a harmonious interaction with a high-context culture as the Saudi culture. The following quote illustrates his knowledge on how to "listen" to locals with the purpose of making sense of what is really meant from the interaction:

> *If you listen, you know – I always say when you're dealing with people in the Arab world, particularly Saudis, they say one thing but mean another. So, I always ask myself the question, 'What does he really mean?' So, he will say something very nicely, very softly but he actually means something else. That's a skill you have to learn. Saudis or Arabs don't want to lose face, so he will say it in a different way. You've got to listen intensely.* (Interviewee 22)

In this case, Interviewee 22 was in various assignments for nearly 20 years in the KSA. Hence, he acquired attributional knowledge from his personal experience and was able to analyse correctly contextual cues (Osland and Bird, 2000).

Interviewee 1, working in a large Qatari hospital for the last five years, detected the importance for senior managers of listening and how people from different culture vary in their abilities to listen. Moreover, according to the respondent, attentive listening should be coupled with asking questions in order to make sense of the discussed issue or problem and reach the right decision. The following quote reveals the significance of listening and asking questions in cross-cultural sensemaking:

*There is a common theme in that, which is that respectful straightforwardness and time and explanation in this culture – taking the time to talk and not hurrying things is critically important and the balance between talking and listening is not always the same…There's a large number of cultures here and each of them has a different natural balance between talking and listening... And here, one often comes across very senior people, in all areas, in all industries, who have this characteristic of when they're not talking, they're not listening.* (Interviewee 1)

By asking questions and listening, Interviewee 1 was able to adequately frame the situation in order to notice the cues that would provide him with information about the specific situation (Osland and Bird, 2000). In addition, Interviewee 1 was still in the process of making sense of what he has learned so far from his IA in Qatar. Moreover, his aim was to categorise his learning and think about how that learning can be beneficial and used accordingly when he is back to the UK working in same large organisations.

*Well I think I would say that this has been a very valuable learning experience. This is a difficult environment, in which to get things done. So, looking ahead, when I go back to the United Kingdom and looking at the range of different perspectives that I have on getting things done in large complicated organizations, this is absolutely invaluable. Around issues like explanation, inclusion…the way that instructions and explanations are phrased, the requirement to identify who the most influential people are. And the most influential people are not always those who are in charge. Funnily enough, I'm in the process of taking stock myself, of what I can learn from this, and how I can codify it.* (Interviewee 1)

Here, it is clear that Interviewee 1 was reflecting on which schemas or cultural scripts (Osland and Bird, 2000) should be selected depending on the cultural context of the country (i.e UK, Qatar).

Besides the skill of listening, observation was also vital for SIEs in order to make cross-culturally sense of the body language of clients from other countries and the small habits of local people. That was perceived as vital in order to build rapport with colleagues and clients and establish a successful collaboration. The following quote illustrates this point:

*I was talking to an Indian client here, explaining to him the work we did, and it took us one month to finish this work. And throughout me talking, he was moving his head left and right, and I'm thinking, 'This guy, he's not agreeing with anything I'm saying.' But this is how they say, 'Yes, ok. Yes, ok.' So, I did not know this. Also, Asians, when they move their eyebrows up – For*

> *us, if you move your eyebrows up, it means no. For them, it means yes…You think they are disagreeing with you, they're not.* (Interviewee 19)

Besides self-reflection to evaluate what was observed and heard during their professional cultural interactions, an overarching issue emphasised by interviewees was seeking advice from a “cultural mentor” (Osland and Bird, 2000) who is usually a colleague or director from the host culture or a compatriot. So, for example, Interviewee 7 used a coffee break during work as a back region (Goffman, 1959) to ask a Saudi colleague for advice. The respondent worked in a Saudi bank in the banking policy unit as an advisor. His role was to build and transfer knowledge to new Saudi employees in the bank. But he had to face a disengaged employee who did not show any motivation to be mentored. Interviewee 7 became frustrated with the perceived lack of commitment and respect from the Saudi employee towards his role as a mentor and this led the respondent to lose his temper when he had a discussion with him. But as he was self-aware of being annoyed with the Saudi employee’s behaviour, he ended the discussion. To make sense of this awkward situation with the Saudi employee he sought the advice of another “culturally skilful” Saudi employee who helped him to avoid further frustration and confrontation with the detached Saudi employee. The following quote from Interviewee 7 shows how the good advice made him frame the situation differently and change his course of action:

> *But he gave me some incredibly good advice. And he’s a young man, he’s only early 30s. Incredibly good advice about appreciating what I’m trying to do but protecting me from getting too involved in a situation where it wasn’t my making.... The advice received was quite simple – which was to acknowledge that the individual involved would not respond to my approach and to appreciate the fact that the personality type involved was not going to reciprocate to my efforts...I was applying my old logic to the situation from my old role. Which was a completely silly thing to do in a completely different organisation.* (Interviewee 7)

Interviewee 15, an Irish advisor to a public bank in the KSA, was supported and cross-culturally mentored by the Saudi business relationship manager, as all attendees in meetings would be Saudis and the “broken English” used would make communication unclear. Hence, the need to seek advice from the local business relationship manager to make sense of what he did not pick up during the meetings. The following comment describes the utility of having a relationship manager to support and advise SIEs:

> *If I'm going to a meeting, I will try and get this gentleman to attend, just to make sure that is there any subtleties that I'm missing in the conversation?...I think the company I work for are aware of this. They put someone in as business relationship manager to help people like me in dealing with the cultural change. This is something that's in place to help me...A positive experience is – To be honest with you, taking that advice that I was given.* (Interviewee 15)

In that case a “local cultural mentor” was useful to “interpret the local culture for expatriates and guide them through its shoals...and correct inaccurate hypotheses about the local culture” (Osland and Bird, 2000, p.73).

Bringing change was often not well received by the local or foreign employees. Hence, SIEs needed to make sense as to the reasons behind the resistance to suggested changes. That was the case with Interviewee 16 managing a team of architects in a construction company in the KSA when he asked the employees to record their time spent on each project. He made an effort to explain to them the purpose behind such assessment, which would be at the end profitable for them and the company as a whole.

> *And they felt as if it was somebody coming in and trying to sort of get the best out of them or check on them and see what they were doing. So culturally, it is not what the guys were experienced in doing. So, there was a lot of resistance to it, a lot of resistance…I did a couple of presentations to them. I tried to sort of put my arm out and say, 'Look, I'm not checking up on you. I need this information for future projects.' What I said to them was, 'We as a company need to be competitive with other people. We need to put in quotations that are competitive, so we can get additional work to keep you guys employed. And I need to know how long it takes to do a specific task.' I sort of tried bringing them along with that, that they were part of the team and I needed their information.* (Interviewee 16)

In the case of Interviewee 12, he had a challenge in managing his employees. As he mentioned, *“they went around me”* to report directly to the CEO of the company. As in the previous case, many local employees did not like to report to a foreign manager. Interviewee 12 faced this challenge in his previous assignment in

KSA and now again in Qatar and was in the process of making sense as of how to include these employees in the team without alienating them. He was also in the process of making sense of the relationships and backgrounds of these employees and the CEO.

> *And then I think if it hadn't been for the run-ins with the guys in Saudi, would I have had the presence of mind to sit back and say, well how can I involve him?...It looks different, because you're dealing with nationalities and cultures. You still have to sit back and figure out who is who. And who is related to who. And who doesn't like who. And why. And who's well regarded and who's not and what's their attitude. And what do they need. And how can you help them or how can you avoid getting entangled in their problems. So, it's easy to fall into the trap of thinking 'everybody loves me'. They don't. Some people dislike me because they dislike the idea of me being a foreigner taking their job or whatever it is.* (Interviewee 12)

Because SIEs were perplexed by the many nationalities they were working with in the GCC countries they used sophisticated stereotyping (Osland and Bird, 2000) in order to make sense of the characteristics of each ethnicity group. Sophisticated stereotyping is defined as reducing the cultural complexity to an abbreviated explanation based on theoretical concepts lacking the negative traits frequently related with its lower-level counterpart (ibid). The following quote illustrate such sophisticated stereotyping used to make sense of the many nationalities SIEs are managing in the GCC countries:

> *The Indians and the Filipinos will please you. They want to say the right things rather than tell the truth. The Egyptians and the Pakistanis can be very difficult to get the truth out of. Some nationalities – the Africans – are strong. They will stick to something. If there's a crisis, the Filipinos, they're very soft and get very frightened. The Lebanese have a French culture.* (Interviewee 22)

The main characteristic of the making-sense stage was the bewilderment and confusion of the SIEs as to the reasons behind what has happened. This is clearly the case as "cultural myopia and lack of experience prevent them from seeing all the nuances of another culture" (Osland and Bird, 2000).

In the next section I examine how SIEs made sense of two extreme critical incidents.

### 5.4.2 Making Sense of Extreme Critical Incidents

In the first case of extreme critical incidents, Interviewee 27 was still in the process of making sense of the preventable accident that caused the death of two foreign engineers. Moreover, he could not grasp the indifference from the local company and local authorities towards such a grave incident. In addition, he was surprised by the concealment of the accident facts by the employees in the company.

> *And that was it. There was no inquiry. There was nothing. It was totally surreal. And very callous and, you know… inshallah, and that was it. So, it was God's will. Yeah, that. And knowing how to deal with it. You know, internally, we had a bigger investigation. And I was part of the investigation. I had to go into the lift shaft the next day and go through a mess. This lift had dropped 7 stories with two men on the roof, and it was pretty messy in there. So, I had to go and deal with that. The next day, I photographed and started a report with the health and safety to try to investigate what had happened. Globally, [name of company] would be very, very concerned with something like this. But locally, they didn't care. They did nothing. Absolutely nothing…And they did, they covered it up. Anyway, it was what it was. I don't know. I think everybody just wanted to get it over and done with. It's a very strange system.* (Interviewee 27)

In the second case of a severe critical incident, Interviewee 16 was shocked as he could not comprehend the mentality of the Saudi employee in taking revenge on his Filipino colleague by beating him. What made things worse in this case was the approval of the Saudi management of the Saudi employee seeking justice by beating his colleague:

> *But again, that was a culture thing. That would not have happened back in the UK and Ireland. If anybody had threatened anybody, they would have been – the police would have been called. But that situation was very much – And my boss, by the way, was backing the IT guy, the Saudi guy. He said, 'He's got a right to get his retaliation back on this guy because of what he did.' So again, for me, that was a major sort of culture shock, that somebody could actually accept that, from a higher management point of view. That was the norm. But it was not right…The whole sort of Saudi-Islamic sort of approach to things is, 'If I'm wronged, I've got a right to take, to get my rights back to you.' Even though it meant him and five or six of his mates beating a guy up, beating a guy up outside the office. It was all cracked. So, yeah, like, again, from a culture point of view, everybody – From a Saudi or Islamic point of view, all seen that as proper, justice was done*. (Interviewee 16)

This section has outlined how the SIEs reflected and made sense of mild and extreme triggered incidents they went through within the context of the GCC countries. The surprise and cultural shock were evident in the feedback from the respondents. The making-sense stage within the four stages of learning from experience can be described as "…putting together a jigsaw...making sense of each individual piece and understanding where and how it fits is exceedingly difficult. As more pieces are put into place, however, it is easier to see the bigger picture and understand how individual pieces mesh" (Osland and Bird, 2000, p.67). It was clear that in the two extreme critical incidents described here the SIEs faced triggered events characterised by novelty and discrepancy (Osland et al., 2007). They therefore lacked such schemas within their repertoire developed through past experiences (Bird and Osland, 2005). As a result, SIEs were inclined in the next stage to think about their interpretation and learning from these incidents.

The next section examines the third theme on how SIEs interpreted the challenges they experienced and what was learned in this new environment in order to alter their behaviour.

## 5.5 Report of Theme 3: Interpreting and Learning the New Culture (thinking)

The third theme concerns how SIEs interpreted objectively novel and paradoxical situations and what lessons were learned. Within abstract conceptualisation it is required from learners, as described by Kolb (1984, cited in Ng et al., 2009 p. 516), "to distil their reflections into more general concepts that can guide their future actions and emphasises thinking rather than feeling". Whereas in theme 2 making sense cross-culturally is about confusion, bewilderment and subjective interpretation as to what went wrong in a challenging incident, in theme 3 SIEs reflect in a more objective way on what led cross-culturally to such negative outcomes in a specific incident. This is the case because the SIE behaves as a newcomer who "relies on cultural assumptions brought from previous settings as operating guides in the new setting and they fail" (Louis, 1980, p.238). At this stage, SIEs are "learning the ropes" of the new culture in order to progress from being a newcomer to an insider (ibid).

### 5.5.1 Learning from Mild Critical Incidents

During several interviews, SIEs mentioned that they responded in a mechanical way to a challenge during their IAs because that was the way they would have behaved back home in similar circumstances. Hall (1989, p.131) posits "an important part of understanding a different culture is learning how things are organised and how one goes about learning them in that culture. This is not possible if one persists in using the learning models handed down in one's own culture." It emerged from this theme that respondents thought about their learnings from specific incidents but also in general as to what needs to be learned within the host culture in order to have a successful intercultural collaboration.

A good example of awareness as to the different communication skills in KSA in comparison with Ireland and the need to seek advice to learn was discussed with Interviewee 15, an Irish SIE working as an advisor in a Saudi bank. As he could not grasp the nuances expressed in "broken English" during the meetings with Saudi colleagues, he used to sit down at the end of the meetings with the local relationship manager to query him about the nuances he could not perceive during the meeting:

> *You just have to be careful about communication, the challenges in communication and doing it effectively and doing it in a style that suits their culture.…Oh, yeah. We have different verbal and email communication, is different over here. But I don't think I stopped at that. I will come out of a meeting with this relationship manager and I will sit down and have a conversation about it. There are times when he has a different take completely on how the meeting went to me. Or he would point out something from the meeting that I wouldn't have picked up on.* (Interviewee 15)

Such meetings with the local relationship manager were vital to Interviewee 12 in order to decipher the Saudi nuances expressed in broken English by the local colleagues and hence learn how locals communicate and express themselves.

In order to learn, "one must transcend one's own system" (Hall, 1989, p.51). In the case of Interviewee 7 discussed in theme 2, seeking advice from one of the Saudi employees was key in order to learn about the "Saudi system", as he realised that he was using the learning model learned in his "Irish system" which was not efficient within the Saudi culture. The following quote demonstrates his learning from the incident with the Saudi employee after seeking advice from a local mentor:

> *I didn't manage him. It was not my role. That was my problem, it was not my role. I was falling into the old construct of my role in Ireland. I was a more hands-on manager. I'm not a direct manager, I'm an advisor. And the learning was that I was stepping over the line into a separate role. So, the only solution was to step back…Absolutely. I'm more self-aware of my interaction with each individual. Why I'm interacting and how I'm interacting and at what level.* (Interviewee 7)

It is clear in this quote that the SIE learned "the process of letting go of old roles" (Louis 1980, p.236). The learning of the new role takes time as interviewee 7, as a newcomer, "try to incorporate aspects of the old into the new role or resist the new role in favour of the old role" (Louis, 1980, p.237).

According to Hall (1990, p.47) "learning to learn differently is something that has to be faced every day by people who go overseas and try to train local personnel". A number of SIEs thought about the general learning they accumulated while working in the GCC countries that were key to having a successful intercultural interaction at work. Some subjects had more than one IA in Islamic countries, and previous experience can affect what can be learned from present experience (McCall, 2010). Interviewee 12, an Irish SIE currently working in a public hospital in Qatar with extensive experience in previous IAs in Pakistan and Saudi Arabia had the right interpretation as to the different learning within Islamic societies in contrast with Western societies. It was evident from his working experience in Islamic societies that he was culturally aware that relationship-oriented societies prioritise building trust in contrast with the task-oriented culture where the priority is to get things done that he was used back in Ireland. Moreover, he learned that in high-context cultures the meaning of what is told lies in the context not the message (Zaharna, 1995). Furthermore, he learned about the polychronic time culture (Hall, 1990) of Islamic societies in contrast to his Irish monochronic time culture. The following quote shows his learning as to how a Western SIE should interact culturally when managing within Islamic societies:

> *And I mean, the culture that I feel closest to in terms of work is 'Get It Done'...And it was very frustrating to try and get things done, from a Western perspective...Everything moves at a different pace...It's a different*

*approach to life and you learned other things like when they say ‘no problem’, they really mean ‘no’. Because it’s not in the culture to offend and say no. So, these were big learning points for me. And they’d be tied up with the pace. It’s very different…You go somewhere and you have to have tea. And if you don’t want tea, well then you still have to have tea. You can cause mild offense by asking for water, but you really need to have the tea. And then you need to sit there as long as it takes, until whatever. And as a Westerner, you’ve no way of knowing how this is supposed to unfold. You get better at it. And as you get better at it, it’s sort of a relaxing. You get less caught up in your own Western mind and you are more able to just relax and talk and drink the tea – and suddenly the business comes about a bit quicker, because you’ve relaxed to the point. They’re not feeling hassled by you... It’s all getting a real feel for the different pace of life. And it’s not that one is better or worse than the other, it’s just they’re very different. And from a Western perspective, you’re almost indoctrinated to think our way is the best. And you find out that it may well be the best in our culture, but in that culture, it doesn’t really work.* (Interviewee 12)

This passage shows Interviewee 12 acknowledging his previous “Western bias” toward the Islamic societies when he mentioned “you’re almost indoctrinated to think our way is the best”. However, he managed to learn and behave in a way suited to the local traditions and customs as he realised that “you find out that it may well be the best in our culture, but in that culture, it doesn’t really work”. Hence, Interviewee 12 was able to “crack the code” of the foreign culture and reached an “ascending restabilisation” (Osland et al., 2007, p.26), that is a level of cultural understanding that would allow a SIE to perform to an acceptable standard.

Interviewee 22, an Irish SIE with extensive working experience in the KSA from 1989, thought that it is crucial to learn about the social system of the Saudis and foreign workers in order successfully to interact on an intercultural level. This is the case as “people reared in different cultures learn to learn differently and go about the process of acquiring culture in their own way” (Hall, 1990, p.47). Interviewee 22 pointed to the importance of learning different cultural systems of other ethnicities in the KSA in order to behave accordingly and lead efficiently:

*And an understanding of their social system, how their families operate, how they communicate with each other within their society. So, you need an understanding of how their system of authority operates. You've got to get to grips with that because different nationalities have a different* *system…You've got to understand how their society works, how their family unit works, how they communicate with each other when they want things done. Then you've got to translate that into how you deal with things on a day-to-day basis. It's not as it is in Western Europe.* (Interviewee 22)

Interviewee 18, a Canadian SIE working in a Qatari bank as head of treasury, has extensive experience in three countries in the GCC countries from back in 2010. He was very explicit that in order to be a successful manager in the GCC countries as a SIE it is essential to understand and express yourself according to the local cultural system of Arab societies:

*...and try to understand how the local culture, ethnicity operates. Because if you can't do that, then you can't succeed. And if you try to replicate what you think is – They don't want you because you're an American or Canadian or Brit, they want you because you have the experience, and to translate that into a local flavour, not to try to come and replicate the way you did things in New York because that's never going to work.* (Interviewee 18)

This extract shows the self-awareness of Interviewee 18 in Qatar as to the need to display a different cultural behaviour in order to be successful in his job position. He used the same word, "translate", used by Interviewee 22 in order to explain the learning process a SIE has to go through, to learn the local cultural system and then manage using, as he mentioned, a "local flavour" different from his own "Western flavour" back in New York.

In many cases, lessons from mistakes were learned and new global leadership skills were developed, as in the case of Interviewee 29, an American SIE working for a multinational in the KSA. As Americans would be direct in giving negative feedback in contrast with Arabs' indirect way in disclosing negative feedback (Meyer, 2016) he had to adjust his approach:

*Now it's actually very comfortable for me to identify an issue and address it. And it actually helps me now because if I do it alone with that person, that person is willing to listen more and offer much more interactive feedback. So, it works out well. But, yeah, it was a curve, at the beginning.* (Interviewee 29)

This shows that Interviewee 29 learned from his mistake and improved his cross-cultural communications skills when giving feedback to his employees by having a one-to-one meeting instead of embarrassing a colleague by disclosing negative feedback in front of other employees. As a result, the local employee was more willing to listen and accept the feedback.

As for Interviewee 16, an Irish architect working in a construction company in the KSA and managing a team of foreign architects, he learned to stop being rude with his employees and instead he adopted good manners in order to build rapport with them:

> *I learned, probably, to treat certain nationalities carefully rather than going in and starting, which I did at the start, to be perfectly honest. You know, I went in and said, 'Where the hell is that, and why have you done that?'*. (Interviewee 16)

Interviewee 12 is an Irish national SIE working in a Qatari hospital as assistant executive director. When he was working in the KSA in a similar position he learned to focus on building a good relationship and synergy with a number of employees who were willing to do so. This lesson learned was beneficial as he was faced with same problems in his previous job position in Qatar:

> *And the one I managed to win over was the most difficult one, but what I did with him was I went to visit him quite a lot. And I said I'm not trying to undermine you, I'm not trying to remove your back door, I'm not trying to do anything like that. I just need to know what's going on, so that when I'm asked, I can answer. When something comes up, I can protect or defend or advance or promote for your department. He was the director of engineering and we were building a new hospital, so it was critical that we worked well together, and in the end we did. But it was a big challenge. So, I suppose, what did I learn from that, in hindsight, I think I wouldn't have wasted my energy on the other two. I wouldn't have wasted my energy on my boss. I would have built the relationships I could and work with that.* (Interviewee 12)

In the case of Interviewee 19, a Lebanese consultant working for one of the big four firms in Qatar, he learned with regard to non-verbal communication when meeting a Qatari woman to avoid inappropriate physical contact such as shaking hands:

> *I learned when encountering a female local here, you should keep your distance, you should not shake hands or make any physical contact with them*. (Interviewee 19)

Interviewee 1, a British SIE working in a Qatari hospital as a strategy advisor, had to learn from a previous mistake when he accepted a suggestion at work that was unsound. This occurred, as he explained, because he was not patient enough to spend the time to listen, asking the right questions and persuade the Qatari responsible of his point of view. Hence, in a similar new incident he spent the time listening, prompting and finally convincing, in a polite way, the Qatari high-ranking leader to accept his suggestion:

> *I have in mind, an experience dealing with a senior Qatari, where (and it turned out to be a good experience) I really had to work very hard to explain to this senior Qatari leader why what he was suggesting was probably not the most fruitful approach. And he was a man who was not used to discussion or debate. But by careful questioning and by very respectfully getting him to unpack the various steps that he anticipated I got him to see for himself that what he was suggesting was not really likely to work. And so, we changed the direction. And yes, it was the senior Qatari's view that we adopted, a different approach to the one he had first suggested. Well that's fine. The outcome was exactly right. Now that was quite a recent experience. Early on, I had had similar experiences, where I'd find myself simply agreeing to something that I knew was wrong. And then somehow having to massage it into a different place, which wasn't straight forward.* (Interviewee 1)

Failure to develop global leadership skills could be due to being judgemental and lacking knowledge about the specifics of a local culture. According to McCall (2010, p. 6), "learning from experience is less likely when people are not yet ready to embrace the lessons that are offered". In the case of Interviewee 4, arrogance was a hindrance to her learning. More specifically, lack of readiness to learn was caused by being arrogant as she considered she knew enough about the local culture. That was the reason she got into trouble with the British Muslim new colleague as she was not fully aware of how to handle men/women relationships within the workplace in an Islamic society. With hindsight, she reflected and acknowledged her weakness during the interview:

> *I think culturally, I think that I felt that I'd read quite a little bit on Muslim culture. I felt that I had a few Muslim friends who'd told me about the shoulds and shouldn'ts and I think I was a little bit arrogant that I knew a lot. When actually I didn't. And so, it made me much more respectful that there are intricacies around offending people… I didn't know all of that, so it's*

*really made me seek out more information about the culture, I guess.* (Interviewee 4)

In another case an “individual’s readiness to learn” (McCall, 2010) was impeded by his/her “generic stereotype” (Osland and Bird, 2000). That was the case with some SIEs regarding their views about local colleagues in the host countries. For example, Interviewee 16 working in the KSA in the construction sector, considered his Saudi colleagues to be lazy. That was a missed opportunity to learn more about the GCC countries collectivistic cultures which, as stated previously, have different characteristics from the individualistic cultures that this interviewee come from. The following quote shows this SIE stereotyping towards local colleagues:

*And to be honest, the reason being is – I don't like to say it, but Saudis are not the greatest workers.* (Interviewee 16)

However, most SIEs did not display such stereotyping in their daily work with local employees. For example, that was the case with Interviewee 9, who was on his second IA in the KSA working in a bank and was affected positively by his previous experience, which helped his learning in his present job position (McCall, 2010). As he revealed during his interview, back in the 1990s during his three years spent in the KSA on his first IA he became familiar with the Saudi mentality, culture and general habits. Therefore, on his second assignment in the KSA he felt that he lacked stereotyping of local employees and did not face a major challenge in assessing the team he inherited in the bank. The following quote illustrates his reliance on fair judgement, not stereotyping, in assessing his team:

*I learned that people are all the same worldwide. It’s the same pool of intelligence and ability. And you shouldn’t really make allowances because you’re in a different country. And in fairness, there’s always been a belief that it’s really hard to get rid of Saudi staff or it’s very hard to discipline them. But that is not the case, certainly in our bank. Everybody’s treated the same. In the past, there was the belief that Saudis got an easy ride. I don’t believe that’s true anymore. Overall, I learned I think to trust my judgement and not to go for stereotypes.* (Interviewee 9)

What we learn depends very often on which culture we come from. Hence, “people may learn different things from the same kind of experience” (McCall, 2010, p.17). That was the case with Interviewee 22, an Irish sales director in KSA and Interviewee 17 an Egyptian general manager in a travel agency in Kuwait. They both had a similar critical incident to encounter, as they had to make a large number of employees redundant in their respective companies. The Irish SIE had to sack over two third of his company's sales force as they were not reaching their targets. According to his rational mindset it had to be done. The only negative side for him was that there was not enough time for training the sacked employees:

> *You had a situation that people didn't have the skillset to do the job and weren't doing the work to a routine or willing to do it. We were getting nowhere. I had to fire, over a period of 12–18 months, 70–80% of the sales force, without the visas being in place for the new sales force to come through. That was quite difficult and challenging. But it kind of had to be done because we were getting nowhere. It was an organisation that had a tremendous number of Egyptians working for it. In terms of the[m] embracing change or taking on change, it was difficult. I would say the negative aspect of it was we didn't put a lot of effort into training. Because it was a company turnaround, things had to be done fast. That was unfortunate. But it had to be done.* (Interviewee 22)

In the case of the Egyptian SIE, a higher-ranking British manager ordered him to sack 25 employees as the company had bad financial results. According to his emotional mindset that was a very bad experience, as he had built a long-lasting relationship with these employees. He thought that this was not an "ethical" decision, but he was "forced" to execute the orders of the British manager. In doing so he chose to sack younger employees and keep older ones. His criterion was that it would be easier for younger employees to find a job in comparison with older employees, as that would be a more ethical decision. The following quote is telling on how the Egyptian SIE compares and contrasts his distressing reaction towards the incident to the calm and composed attitude of the British manager:

> *…I told him, 'I cannot do that. It's not ethical. And how can I do that on the spot?' He told me, 'Either you do it or I will come myself and select the people – you, you, you, you, out. You are out, you are out, you are out.' So, I was forced to…You can say, this is how British they are, handling things with very – he was very calm, very quiet, and he has no problem to kick out maybe 25 people. And he was not – He was ready to do it without any hesitation. And for me, it was like, I was in tears that day because I had worked with this staff for a long time, and they were all very professional. And I was involved in recruiting them, and they left their jobs and they came, they worked with me, after one year, I'm telling them, 'Ok, bye bye.' So, this is a difference between how European people can, what they can do and what we cannot do…But what I have done, I have chosen the pretty*

> *ones, I have kicked them out because I am sure that they are going to get, it's easy for them to get another job. The people who have kids in school and the people that are little bit old; I kept them because it was not easy for them to find a job…Yeah. It was a very bad experience in my life, yeah.* (Interviewee 17)

The two incidents were similar, but the learning was different for the interviewees. In the case of the Irish SIE, his logical and pragmatic thought was that next time he would have to put in place a training seminar to support the sales force before sacking the least productive employees. His learning makes sense because in task-based societies relationships are determined by functionality and practicality (Meyer, 2016), which is the case in Irish society. However, for the Egyptian SIE the learning was that he should not be so emotional or let people see his emotions when he had such tough decision to take. His learning is also justifiable as in relationship-based societies such as those in the Middle East, relationships are built up slowly and not just based on professional credibility but also on deeper emotional connections, and after the relationship is developed it is not renounced with ease (Meyer, 2016).

Besides learning from challenging critical incidents and developing global leadership competencies, some of the interviewed SIEs were also eager to learn and develop themselves on a personal level. According to Hall (1986, cited in Hall et al., 2001 p.336) "international assignment is a powerful natural intervention in a person's life. It is an incredible source of both task learning and personal learning...It helps them learn how to learn." In the case of Interviewee 23, an Egyptian SIE working in a private Qatari bank and holder of a PhD, he used the expression of being "the doctor for yourself" in order to describe the need to detect his weaknesses with regards to the knowledge and skills he lacked and fill in this gap.

### 5.5.2 Learning from Extreme Critical Incidents

In the two cases of extreme critical incidents, SIEs were confronted with a "reality shock" (Hughes, 1958). As newcomers in the local cultures of the GCC countries they did not have a "map of the territory" (Louis, 1980) in order to respond with meaningful and relevant actions when confronted with such extreme incidents. Hence, they had to pause and think about the lessons learned from each incident.

As a result, these SIEs will be able in the future to frame correctly a situation and choose adequate attributions in order to select the appropriate script.

In the case of Interviewee 27, the death of the two Egyptian engineers in the construction site was a grave outcome of this critical incident. The learned lesson from this shocking experience was to follow the safety procedures that are in place with the same strictness as in Europe, as he realised the harsh way in which this was not the case in the KSA. Moreover, he screened the competency levels of the engineers in order to decide about their fitness to participate in certain projects. In addition, he used a monitoring system to assess the safety walks in the various projects:

> *I learned a human life doesn't mean very much here, in the kingdom. I learned something else from a new experience completely. Obviously, from a health and safety aspect of things. The rules were in place, but they weren't getting followed properly…So, what I learned is we have to follow through 100% because we're responsible for so many people's lives. The elevator industry, for an engineer, is the second most dangerous industry in the world…And we do take it very seriously but obviously not as seriously in Saudi Arabia as the rest of the world. So, the main lesson I learned was that we had to really stringently follow the European norms and get the company working in Saudi the same as that.* (Interviewee 27)

In the severe critical incident encountered by Interviewee 16, the Saudi employee beat up his Filipino colleague. As a consequence, the Saudi employee was sacked and the Filipino resigned and went back home. The learned lesson was to act promptly next time by informing the CEO to sack both employees at the start of the fight in the office and thus send the message to all employees in the company that such inappropriate behaviour would not be tolerated:

> *From my point of view, the learning was that these, certain people – and again, it probably would have been the Saudi/Islamic influence would be they've got a certain set of regulations that we in the West would not be familiar with. And those regulations were, you know, it would be an eye for an eye, a tooth for a tooth. They do not see themselves as being, the whole thing finished, until they have got retaliation. So that was the retaliation. It was done. They beat the guy up, that was it. Finished. Even though the guy came and apologized to him, he still didn't see that as enough.* (Interviewee 16)

As SIEs lacked in most cases in stage two the intercultural sense-making to identify cues, recognise patterns or develop cognitive schemas (Osland et al., 2007), they learned in this stage from their experiences new cues and actions to form schemas that will enrich their repertoire in order to choose the adequate cultural script in various situations in the future.

The next section reviews the fourth theme on global leadership skills exhibited by SIEs in the front region within the workplace.

## 5.6 Report of theme 4: Displaying Global Leadership Skills (acting)

The fourth theme shed light on the active experimentation (Kolb, 1984) of SIEs when displaying global leadership skills during their IAs in the GCC countries. Active experimentation as described by Kolb (1984, cited in Ng et al., 2009, p. 517) "involves a pragmatic focus on influencing the environment and getting things done and is concerned with whether one's enhanced understanding fits reality". Furthermore, this theme encompasses engaging actively and taking initiatives within intercultural circumstances while managing a group of employees (Yamazaki and Kayes, 2004).

Exhibiting global leadership competencies by SIEs took place in the "front region" (Goffman, 1959). That is, addressing the employees, CEO or clients of the organisation in an office in the bank, a corridor in the hospital or a construction field. Moreover, according to Bartunek et al. (1999) the creation of meaning for a company's members is an essential part of a manager's role. Creating meaning is achieved through "sensegiving" that is the "process of attempting to influence the sensemaking and meaning construction of others toward a preferred redefinition of organisational reality" (Gioia and Chittipeddi, 1991, p.442). I have used a taxonomy of global leadership skills categories adapted from Mendenhall et al. (2017) to highlight the global leadership skills displayed by SIEs, namely managing self and managing people and relationships skills.

Table 5.3 displays the two groups of developed global leadership skills adapted from Mendenhall et al. (2017), that is interpersonal and self competencies.

**Table 5.3 Global leadership skills reported by SIEs (by category)**

| Managing People and Relationships | | |
|---|---|---|
| **Cross-cultural communication** | **Interpersonal Skills** | **Valuing People** |
| *Cross-cultural communication*<br>*Cultural sensitivity*<br>*Supervise employees of various nationalities*<br>*Work with colleagues from other countries* | *Emotional intelligence*<br>*Build relationships*<br>*Urgent listening*<br>*Result through relationships* | *Create and build trust*<br>*Creating and relying on trust* |
| **Empowering Others** | | |
| *Empowering Others*<br>*Develop future leaders* | | |
| **Managing Self** | | |
| **Resilience** | **Character** | **Inquisitiveness** |
| *Self-Confidence* | *Tenacity* | *Inquisitiveness*<br>*Humility*<br>*Curiosity and learning*<br>*Non-judgementalness*<br>*Learning from mistakes* |
| **Flexibility** | **Global Mindset** | |
| *Flexibility* | *Cosmopolitanism* | |

Adapted from Mendenhall et al. (2017)

In the following two sections the two groups of developed global leadership competencies by SIEs are considered.

### 5.6.1 Skills of Managing Self

Regarding the competencies of managing self, the character composite skill was exhibited by SIEs through the dimension of tenacity, in the case of Interviewee 27, for example, in implementing the use of a software by the employees to better monitor the business:

*Human nature doesn't like change. But it was the only thing we could do to try to control the business. Because it was shocking. So, I persisted and persisted. I went to every branch, weekly. I made them do it. And in three or four months, we started to get a little bit of light at the end of the tunnel, we started to find out what engineers were working, how many hours they were actually physically working on the site, what jobs they were doing, where they were going, where they weren't going. We started to get some sort of control. Within six months, we had control of the business.* (Interviewee 27)

Concerning the resilience composite skill, self-confidence dimension was illustrated when, for instance, Interviewee 26, an Irish advisor in a Saudi bank showed confidence in his views and advice to employees and bosses:

*People in the role in which I perform – as advisor – are expected to be subject-matter experts in the topic in which you specialise. Accordingly, it is important that you are confident in your views and opinions when giving them and also knowledgeable to be able to answer queries from staff and management (right to the top of the organisation).* (Interviewee 26)

With respect to inquisitiveness composite skill, inquisitiveness, humility, curiosity and learning, non-judgementalness, and learning from mistakes were the four dimensions mentioned the most. With regard to inquisitiveness, some of the interviewees were learning Arabic language to build better rapport with locals. Others liked to travel through the Arab world and were attracted by the region and fascinated by the people. The following quote illustrate how interviewee 2 showed inquisitiveness in a new cultural environment:

*…motivation was to work within a new health system. Perhaps, learn a little bit more about different cultures. Understanding the Arab world, I guess you would say. The culture of Saudi Arabia. The expectations of healthcare in the Middle East…. Because I've had the opportunity to travel to every country around Saudi Arabia, I was in Jordan last week. I've gone to Egypt several times. I've really travelled a lot.* (Interviewee 2)

Curiosity and learning dimension was exhibited by Interviewee 3, as he was interested in learning Arabic. He used to go out for a coffee after work with his Arab colleague. During these gatherings they would teach him Arabic and in return he would teach them business English:

*I wanted to learn some Arabic. And some of the guys at work wanted to improve their business English. So, what we do is, every two weeks, after*

> *work at five o’clock, we go for coffee and I try to teach them some English and they try to teach me some Arabic.* (Interviewee 3)

Humility dimension was demonstrated by being humble when a SIE let his employees correct his mistakes in English:

> *Most of the people here, I have people here, especially the Indians, they are very fluent in English. We have such good relation and I am saying to them, 'If I'm going to make a mistake, please correct me.' Ok? So, it's because this is how we can learn. Otherwise, you cannot. And they know me very well and they used to tell me, 'Ayman, you said that, but it's supposed to be like that,' if I'm sending an email and I made a mistake, they are telling me, 'You should write that instead of that’.* (Interview 17)

As for non-judgementalness dimension, SIEs exhibited this skill by expressing their respect and appreciation for locals in the GCC countries, as in the case of Interviewee 22, an Irish SIE who developed this dimension while working in the KSA for nearly 20 years in four consecutive assignments:

> *Honestly, my experience has been fairly positive, thanks be to God, because I respect the culture and I'm sensitive to the culture. I mean, I like Arabs, I like Saudi people. I think they're very tolerant. Saudis are very tolerant. What other country in the world would allow seven million expats to come in and work? So, I have a lot of empathy with Saudi, with the progress they've made and the challenges they face.* (Interviewee 22)

With regards to learning from mistakes dimension, all SIEs exhibited such competency through learning from mild or extreme critical incidents. For Instance, in the serious critical incident, confronted by Interviewee 27, the learning from the death of the two Egyptian engineers was to make sure that safety measures are as strict as in developed countries in every construction site:

> *How do I quantify what the things I've changed because of it. Definitely assessing the skill levels of the engineers or what team leaders would be involved in certain projects. That would definitely be one. I would make sure we had the right people in the right place. Instead of just sending people out…That would definitely be the main point…The measures I introduced were very successful because using the monitoring system gave us full visibility concerning safety walks on site and which sites were done every week. This also allowed us to see the sites we did not do. This in turn focused our attention on the sites that still needed to be covered.* (Interviewee 27)

With regards to the flexibility composite, behavioural flexibility was displayed both in a positive and negative way by SIEs in their relationships with directors and clients. According to Gudykunst et al. (1988), behavioural flexibility is important in order to convey positive impressions within a multicultural environment. It therefore makes sense for SIEs to make a good impression on their directors and clients given that they are hired as well-paid expats because they are supposed to be the “experts” in their field. Hence, they not only have to demonstrate their expertise but also impress positively their directors and clients. The following quote from an Irish SIE pinpoint the urgency to impress the management by “showing” his expertise and knowledge:

> *Out here, that’s the key difference, that they actually look to me for decisions and my boss has said it to me. ‘Well you’re the expert now. You’re the guy we brought in. So you better step up to the plate.’ And I was happy to do that. And to some extent it was a new role for me, rather than just implementing other people’s decisions, I had to try and lead the change. When we ran 12 operational improvement initiatives in the department, and I had to push the guys. And that was new. So that was a new experience for me. And I certainly wouldn’t like to think I was arrogant about it, but I did it with an air of confidence, that I don’t think I would have had, even though I’d worked in [name of previous company] for 35 years.* (Interviewee 5)

Impression management was used by SIEs to impress clients too. Interviewee 19 is a Lebanese SIE working as consultant in one of the big four accounting firms in Qatar. He learned to tailor his presentations to the clients depending on what they want to hear and see. Hence, clients were satisfied with the end result. The following quote demonstrates the importance of cultural sensitivity achieved by adjusting the presentations to clients’ cross- cultural background in order to impress them:

> *Some cultures, in my opinion, they like to look at the details more, ok? They want to know every single thing. Others, they just want the end result. Based on this, before we go to a meeting – Like, if you go to a culture that just wants the end result and you start talking about details left and right, they will lose their interest and they will make it their point just to make you look bad. You're not doing what they want you to do. So, based on this, I changed the way I do meetings...depending on who you are dealing with, tailor your communication.* (Interviewee 19)

However, impression management can also be used in a negative way. According to Mangham (1996, p.32) “social actors are for the most part seen as duplicitous, deceitful and fraudulent beings…”. This can be the case due to the impact of cultural factors on impression management (Spencer-Oatey and Franklin, 2009). Thus, for example, the case of Interviewee 20, an Irish SIE working as associate director for a construction company in Bahrain on his second assignment in the GCC countries. During his first assignment in the KSA he had a conflict with the Saudi director of the company when he was asked for feedback about a new project but did not have the information. The SIE behaved in the way he would have in Ireland: he was honest in declaring that he did not have the required information and that he would come back later after collecting the facts or figures. But in cultures such as the GCC countries, that would not be acceptable since managers are seen as experts and in order to sustain their credibility their answers should be perceived to be accurate (Adler, 2008):

> *What I always found in my career was try to be honest. If you're reporting to somebody or presenting something or whatever you might be doing, if you don't know what you're at or you're not 100% sure, you might say, 'Look, I'm not really sure about that. Let me check that again. I'm going to do a bit more research and I'll get back to you.' And most people go, 'Ok, well, can you get back to me tomorrow? Can you look into that and get back to me?' They don't do that. If they sense weakness, they are all over you. It's like, 'What do you mean you don't understand? Why don't you understand? We hired your company and all this expertise and blah blah blah and you should know this.' You had to be very careful what you said. And you didn't want to get caught out like that. And sometimes, you know what? – I would never do it in Ireland or the UK or anywhere – but sometimes you could bullshit your way out of a situation, and they don't know. They don't know. Once you sound confident and come across confident, it worked. It's got me out of a couple of situations.* (Interviewee 20)

With regards to global mindset composite competency, cosmopolitanism was demonstrated by, for example, Interviewee 2, a Canadian director of nursing in a Saudi hospital:

> *Because I’ve had the opportunity to travel to every country around Saudi Arabia, I was in Jordan last week. I’ve gone to Egypt several times. I’ve really travelled a lot...And I really love the fact that I understand Middle Eastern culture much more. And the issues in the Middle East, my goodness, I’ve seen the whole transition in the Middle East. From all the changes in Egypt to the changes now in Syria – we call it the ring of fire is*

*incredible in terms of change in governments and issues for people.* (Interviewee 2)

### 5.6.2 Skills of Managing People and Relationship

Within the managing people and relationship group of skills, cross-cultural communication composite competency was the one mentioned most often by SIEs. Among this composite, communication skills, supervising employees of other countries, cultural sensitivity and work with colleagues from other countries were the dimensions most referred to. Moreover, the majority of the interviewees revealed that communications skills are crucial to being a successful leader in the GCC countries. Interviewee 13, working as a chief advisor in a Saudi bank, revealed how developing his communication skills was crucial to reaching out to Saudi colleagues and convincing them of the importance of having in place a performance assessment. The following quote is enlightening on how vital it is to adapt the style of communication to the local culture:

> *Leadership is all about identifying the style of communication or the makeup of the people you're working with and trying to bend and flex. I probably realised it in practical and very much live terms here. You really do have to hone and change and flex and stretch your style to suit the style of the people you work with. Particularly found this as an issue, because how I was saying what I was saying was important. And yes, it was important initially, but the ability thereafter to persuade and involve people in the process and make them realize that there were reasons for the evaluation – why they were getting the evaluation, what the evaluation would mean – and as such this was a process that was here to stay. And whether it was me or somebody else who was doing it, they would have to come to terms with it anyway.* (Interviewee 13)

Non-verbal communication was also vital to developing as a SIE within the GCC countries, as in such conservative Islamic societies greeting a local woman would differ from other Arab societies. That was the case with Interviewee 19 from Lebanon, as he exhibited such skills when meeting a Qatari woman by avoiding shaking hands and just saying hello:

> *In later experiences, I stopped doing this. I just say hello from a distance, and this is it.* (Interviewee 19)

The identification of the style of communication of local colleagues or directors and the adjustment of a SIE's communication style accordingly was discussed by

Interviewee 7, an Irish SIE, regarding his communication style with his Saudi director:

> *And how you communicate is driven by your boss's style – especially in a situation where language/translation errors are really, really possible. So, I try to customise my communication style to suit my boss. I make sure that I keep looking around corners for him. I work hard for him. He knows that. We can have fun. We talk about life and family. We don't know each other very well, but we know each other to have a chat about basics. He works really hard. I make sure that I support him. And try to help him get his unit off the ground, which is a new unit in the bank...* (Interviewee 7)

The vital importance of communication skills and the repercussions of not being able to reach out to local and foreign colleagues as a manager were discussed by Interviewee 29, an American SIE working in a German multinational in the KSA as a regional head of financial services.

> *Ability to express yourself. If you are not able to express yourself to the diverse people around you, and when I say 'express myself' you need to be able to express yourself both in written and verbal, and body language. All three of the above. If you are not able to do that here, you won't really be able to grow, as such. You really [need to] know how to write effectively and communicate your ideas in a very simplified manner. If you write too much – I have known people at my workplace that they know how to write extremely well but they write extremely long emails because they do not know how to convey their point in a curt manner. And they're ignored. They get ignored left, right and centre; their emails become a mockery. So, you have to be able to know how to communicate yourself in an effective manner. I've realised that just like the United States, people in this part of the world communicate a lot through body language. And you can sort of tell where the conversation is heading, if the body language is not supporting it. Communication is absolutely important for any manager.* (Interviewee 29)

The cultural interest and sensitivity dimension was demonstrated and developed by several SIEs. For example, interviewee 3, he learned from his mistake of comparing his Saudi colleagues to his wife, which result in his colleagues not talking to him for several weeks. He became more culturally sensitive as quoted below:

> *Be more careful with 'quips' that may offend another culture.* (Interviewee 3)

With regards to supervising foreign employees, that was a skill developed by Interviewee 16 when he was asked to manage a team of 50 international staff without having such supervisory experience as an architect in Ireland:

> *I was asked to do a job because I was not really qualified to do. I was qualified to design buildings. What I actually ended up doing was managing a quite large team…So basically now I managed a team of about 50 engineers, which includes architects, mechanical, electrical, structural engineers, project managers and surveyors. So bottom line is I don't do much design, which is what I qualified to do. I manage a team of about 50 engineers…Yes, my management skills have certainly improved.* (Interviewee 16)

As for working with colleagues from other countries, that was the case with all SIEs working in the private sector in construction, shipping, healthcare and the banking sector. For example, the Greek SIE working in a shipping company in Qatar revealed that he has colleagues from 80 different countries:

> *Our company has 80 different nationalities. So, we are good. It's a kind of interesting aspect of working here, you know. You learn to work with everyone.* (Interviewee 25)

With regard to interpersonal skills composite, emotional intelligence and influencing competencies dimension were manifested by SIEs. Emotional intelligence skills were exhibited by interviewee 16, as he used to behave towards his foreign employees in a disrespectful manner which was counterproductive. But in order to have better communication with his employees and influence them in reporting the time they spent working on each project, he had to develop his emotional intelligence skills by being self-aware about his behaviour and effectively modifying his interaction with his employees:

> *I learned, probably, to treat certain nationalities carefully rather than going in and starting, which I did at the start, to be perfectly honest. You know, I went in and said, 'Where the hell is that, and why have you done that?' But certain nationalities, now, you've got to go along and say to them, 'Great job, well done. I appreciate what you have done but I need this from you now.' [This] approach is better than the heavy-fisted approach with certain nationalities.* (Interviewee 16)

As for the influencing dimension, in the case of Interviewee 12 he had a negative incident in the KSA as some of the local directors were not reporting to him directly but preferred to report to the local CEO. Influencing competencies, he had developed during his previous assignment in the KSA led him to meet several times with these employees and convince one of them of the importance of having his feedback in order to protect and promote him when the time was ripe. This challenge helped him to develop further his influencing skills during his current assignment in the Qatari hospital regarding his relationship with the head of patient billing:

> *Here, in Doha, now there are a lot less Saudis. In Saudi Arabia, the majority of the population is Saudi. Here, the Qatar population is in a very small minority, but all the senior positions are held by Qataris. And quite a number of the middle management are Qataris as well. There's one particular guy, he doesn't report to me, he reports in a different directorate, but he's the head of patient billing, so he's quite important to me. What I do in the insurance has the ability to sideline him completely – but he's a Qatari so I have to be very careful that I don't alienate him. So, what I did was I went and started to meet with him on his own and get him involved in the insurance, not from an operational point of view, but from an advising point of view. And so, we'd bring him to meet with the ministry of health to advise them on the setting up aspects. He's been dealing with who's eligible for what for 20-something years. He knows it inside out, but he'd never been consulted at all. So, in that case it worked out very well. And then I think if it hadn't had been for the run-ins with the guys in Saudi, would I have had the presence of mind to sit back and say, well how can I involve him?* (Interviewee 12)

Building relationships and results through relationships skills dimensions was also displayed by SIEs. For example, Interviewee 11 on a previous assignment in Kuwait introduced a culture of inclusion by having a transparent system, which was based on informing all employees on the role of each department and the purpose of each decision taken in the company:

> *…but then in my team I had Kuwaiti, Jordanian, Palestinian, Iraqi, Egyptian, South Africans – so a huge diversity of nationalities, which was great. One of the things I actually did was I included them all in what the plans were and what the intentions were. And what we were expecting to achieve and what I was expecting from them. And I think that to me is one of the things that I have learned about cultures, or certainly in the Middle East... And I think that's something I learned very early on, with building the relationships*

*and rapport in [name of company], is that almost a void between the senior team – CEO, CRO, CFO, etc. – and the people who were doing the work…And that was something I learned very early on and I was very comfortable to adapt to, because that's my nature, people are what I'm about. Processes and procedures are one part of it, but you can take the people through those processes and procedures and make them recognised and value what they do their motivation is going to double. So, for me it was a learning very early on that it doesn't matter where we are in the world, people have to understand why.* (Interviewee 11)

Urgent listening skill dimension was also exhibited by SIEs in their daily interactions with their employees. The following quote highlight the display of this competency:

*So, I like to listen to my team. I meet always with them at the end of the day, between me and my engineers and my foremen. And I also like to ask them about their problems. Same as I ask them to do tasks and to do the works. Also, I should listen to them if they have any problems in their accommodation, any problems in their home country.* (Interviewee 30)

*Yeah. Interaction. The open-door policy okay? As a senior manager, don't close your door. Hear the staff. Listen to them.* (Interviewee 23)

In valuing people composite, create and build trust and creating and relying on trust competencies dimensions were also demonstrated by SIEs. Trust as discussed earlier is a prerequisite within Arab societies as building trust with Arab employees and clients precedes collaboration and doing business. The following two quotes illustrates this fact:

*Here in Saudi Arabia, there is the added problem of the language and cultural barriers. The more successful overseas individuals and companies here, are the ones who spend time getting to know the culture – the language is difficult and not easy to master! – and the route to 'yes' with the Saudis. Trust in Muslim countries is only earned through being present and communicating face to face. Proxy companies generally don't last out here!* (Interviewee 13)

*Well, I think any manager, if he's coming down here, and his responsibility is people management, the first and foremost thing that you need to do is you need to reach out to these people, and you have to make them feel very comfortable that they can trust you.* (Interviewee 29)

Regarding empowering others composite skill, empowering others and developing future leaders were the two competencies dimensions expressed by SIEs through mentoring and coaching local and foreign employees. That was the case as SIEs were experts and knowledgeable in their respective fields. Due to the nationalisation process in all GCC countries, aimed at bringing more young locals in to the workforce, expatriates in general have the responsibility to develop local employees to hold future leadership positions. The following two quotes illustrate the role of SIEs in developing employees using their coaching skills:

> *I've really enjoyed coaching and mentoring my Saudi nurses, I've done a lot of that. As we went from 7% to 11%, which is quite a jump when you think about it. Because each person had to be individually coached. So, it's been great.* (Interviewee 2)

> *…my ability to actually engage and build rapport is going to be on the basis of what I do, rather than what I say. So that's my ability to spend time with these people, immerse myself in projects, try and use what I know or my experience to help them and coach them where I can, to offer any type of assistance that I can possibly.* (Interviewee 13)

This section has outlined the competencies developed and displayed by the SIEs during their IAs in the GCC countries. The next section delineates the fifth theme's report on the adjustment of the respondents to their new environment. Adapting factors for an expatriate are considered to correlate with global leadership skills factors (Mendenhall et al., 2013). Hence, the discussion in the next section deals with the adaptation SIEs achieved after the aforementioned first four stages of experiential learning.

## 5.7 Report of Theme 5: Adapting to the New Culture (adjusting)

The first four themes described the four dimensions of experiential learning that SIEs go through, which is experiencing, reflecting, thinking and acting. SIEs then reach an effective level of cultural adaptation through a set of global leadership competencies acquired as discussed in the previous section (i.e. cultural flexibility and sensitivity). Moreover, SIEs' adjustment was achieved through a combination of factors and organisational assistance discussed below.

The first few weeks or months in the GCC countries were challenging for the SIEs. Some SIEs described this period of adjustment as "sink or swim" or "lion thrown to the fire". The following quote outline what SIEs had to do in the first few weeks or months to become familiar with the environment at work and in everyday life:

> *In essence, what happens here is like a lot of things in Saudi, to be honest with you. To some degree, it's sink or swim. Organisations, large government organisations, don't really have a structured induction program. They tend to show you where your office is, they give you a computer and a telephone and then they throw work at you. That's kind of the way it works. So, in terms of immersing yourself, you get immersed whether you like it or not. And likewise finding your way around here…luckily enough I knew a lot of people here already and they give you lots of information. Saudi is a very dynamic and very fast moving country, with huge levels of mixed influences, both indigenous and non-indigenous. As a result, you really have to get out there among the community and get to know things. Find out where things are and ask questions. Don't be afraid of people who are dressed different to you and speak a different language or whatever. All that kind of stuff is probably part and parcel of my conditioning in the defence forces, where basically you were told look you've a job to do, you've got to get it done, and you've got to do what's required to get it done. And sometimes you don't really know what that is until it's presented to you.* (Interviewee 13)

With regards to the necessary period for adjustment, several SIEs disclosed that it took them between 12 to 18 months depending on their personal circumstances, as illustrated by the following quote:

> *It took me a good 18 months to adapt to the culture. I found I adapted better to the culture when I worked with [name of company]. It was a truly Arab company. Whereas working in [second company's name], it was a very Western culture and you didn't connect as much with the local culture because it was all Westerners. It was a Western system and you didn't empathise and embrace the Arab culture. In fact, [first company's name] was a richer experience.* (Interviewee 22)

I will use Black et al.'s (1991) three aspects of "objective" work adjustment, general adjustment and interaction adjustment to describe my research subjects' life and work adaptation in the GCC countries. Objective adaptation alludes to "the mastery of role requirements and performance" (Howe-Walsh and Schyns, 2010, p.11). The focus on objective adjustment is due to the impact and control that HRM within an organisation can have in order to support a SIE's adaptation (ibid).

It should be noted that in contrast to CEs, SIEs are not offered any training in cultural adjustment before leaving their home country or after arriving in the host country as usually is the case with CEs.

### 5.7.1 Work Adjustment

With regards to "work adjustment" for a SIE, the selection process would be vital to ensure that the candidate fits in with the culture of the company and has a successful interaction with local colleagues (Howe-Walsh and Schyns, 2010), which will have a positive effect on the work adjustment of the SIEs. A successful selection process should include an invitation to the candidates to visit the host country and the organisation before the two parties agree and commit to a collaboration. Such selection process was not the case with most interviewed subjects. In fact, an exception was an Irish SIEs working in a Saudi bank had to travel to the host country for a week during which they had face-to-face interviews and got to know the working place and colleagues before they decided to accept the job, as described below by Interviewee 15:

> *…one agency that specialises in recruiting people to work in the Middle East – and that agency contacted me to say that some of the skills I had in SAP (Systems, Applications and Products) implementation and in project management were of value to one of their clients in the Middle East. There would have been a Skype interview with them and based on that, they would have then brought me out for a week where I would have done interviews and presentations. But it was also an opportunity for me to understand the culture and the climate that I was going to be working in....So from that point of view, they were excellent from that point of view, if you know what I mean, that they were saying, 'Look, we have to ask questions but you also have to ask questions.' And I think at the end of that week, they offered me a job and I handed my notice in to [name of employer]. And then six months later, I was working in Saudi Arabia.* (Interviewee 15)

Such a visit is vital as, in contrast to a CE, a SIE would choose his/her employer. Hence, spending a week at the office of the new employer would facilitate both the employer and the SIE to mutually decide about their new collaboration. Moreover, it is evident from research that role clarity decreases the amount of unpredictability linked to the work situation and so adjustment at work would be facilitated (Black et al., 1991).

An important criterion for many employers in the GCC countries is the candidate having previous international experience, as this enhances SIEs success in his/her new job position (Howe-Walsh and Schyns, 2010). In addition, level of education and acquired qualifications are also prerequisites from the employers. Interviewee 12 had both the required previous international experience and the qualifications:

> *But the international experience made a huge difference from then on. And particularly going back to Saudi, the fact that I had worked abroad already made a big difference. The year before I went to Pakistan, I had started to do a masters in DCU...[Dublin City University] And I finished that while I was in Pakistan. And that made a huge difference afterwards – the fact that I had a master's degree. I don't think I would have gotten the job in Saudi without it, regardless of what experience I had. Because you know they're very focused on pieces of paper. And likewise, here, although it wasn't a requirement for this particular job, you needed to have a bachelor's degree and a professional qualification, but a master's degree was better still. So, it didn't do me any harm. And the fact that I'd already worked abroad twice is probably the biggest thing in your favour. The fact that you've worked in different countries, in terms of looking for a job outside of your home country.* (Interviewee 12)

It is noteworthy that half the subjects in my study had at least one previous IA. Furthermore, the majority were senior employees and had a master's degree. Hence, they had the required working experience and technical skills as experts in their fields and the prerequisite qualifications in order to be sought after in the GCC countries. In general, the majority of SIEs displayed a good fit between the job they accepted in the GCC countries and their previous job position back home or abroad, contrary to what was stated by Howe-Walsh and Schyns (2010). In addition, all SIEs' contracts were renewed several times as employers were satisfied with their performance and the SIEs were content with their progress and adjustment to their new life and work.

Having worked previously abroad and being a good fit for a new job position would ease the adjustment period for a SIE. Interaction adjustment will be discussed in next section.

### 5.7.2 Interaction Adjustment

The second aspect of objective adaptation abroad is "interaction adjustment" through collaboration with local citizens (Howe-Walsh and Schyns, 2010). The majority of the interviewees within the banking and healthcare sectors were leading local employees and, in many cases, also had local stakeholders. Several SIEs mentioned that it is vital to “align or lower your expectations” with regards to what to expect from local employees in order to have a smooth adaptation. For instance, Interviewee 24, a Greek SIE working in a Qatari shipping company, said the following:

> *...you need to be able to adapt to the people you handle. You need to align your expectations to what they can offer you. They have different characters, different ways of seeing the world in general. You need to adapt to that. Also, you need to manage your own beliefs and perceptions so, again, you adapt to the situation here. It's kind of different. So, things you wouldn't be expected to do in Spain, in Europe or the States, you would have. Let me give you an example. Someone takes a break from a meeting to go to pray. If I had this in London or in the States, I would probably – I don't know, maybe he would not have a job the next day. Here, it's not like that. It's the local culture, the local situation so that's ok. These things, you shouldn't let them get under your skin because then you would really have an issue.* (Interviewee 24)

As mentioned in the literature review chapter 3, there are individual determinants of expatriate adjustment that would link to global leadership skills (Mendenhall et al., 2017). Such competencies were displayed by the SIEs, which helped them to adjust in their interaction with locals. For example, Interviewee 5 demonstrated relationship skills with his Saudi colleagues as follows:

> *All my colleagues are Saudis. I’m the only Westerner in the section I’m in. So, all my colleagues are Saudis. They’ve all been very, very nice to me. One guy in particular has been very, very good to me. And he’s brought me to what would be called a ‘gentlemen’s club’ if it was in another country. It’s all men, because of course there is strict gender separation here. The men sit around in the evenings, drinking tea and playing with their iPhones. So, I’ve gone to that a few times…In addition, I’ve been to this man’s house, twice. On both occasions, when my wife and kids came over here. He invited us out to meet his wife and kids at his house.* (Interviewee 5)

In their interaction with locals, SIEs also showed empathy and respect for others’ skills (Mendenhall et al., 2017), some expressing the view that they would be careful not to criticise or openly challenge a local colleague:

> *One of the reasons I was brought here is that culturally, Europeans – and particularly my background is I'm not afraid to challenge consultants. So, I would be much more challenging in meetings than Saudi people tend to be because culturally they don't challenge publicly in that way. So, I would go to meetings and in some instances, I would challenge hard. The people I'm challenging are generally Westerners but not always. They would rarely be Saudis. I'd be very, very careful to challenge a Saudi. But I would have no qualms about challenging guys from the UK or America or Canada or whatever.* (Interviewee 26)

The use of mentoring and on-site cross-cultural training might also enhance SIEs' interaction adaptation in the host country (Howe-Walsh and Schyns, 2010). It is obvious from studies that social support from supervisors and colleagues' eases adaptability (Black et al., 1991). But, as stated earlier, such support is not offered in most cases to SIEs in contrast to CEs. Therefore, several SIEs disclosed that they were seeking advice from local and compatriot colleagues, as discussed in theme two. Few multinational employers offered intercultural training on site. In addition, such training was offered by few recruitment agencies prior to SIEs leaving for their assignment in the GCC countries. In the next section general adjustment is discussed.

### 5.7.3 General Adjustment

The third aspect of objective adaptation abroad is "general adjustment" which an expatriate achieves by finding suitable accommodation and having a satisfactory social life (ibid). In addition, SIEs can have better adjustment if supported with non-work-related activities such as arrival and reception, opening a bank account, shopping, transportation, dealing with public authorities and the healthcare system (Suutari and Burch, 2001). In most cases SIEs were assisted by the company or a colleague in these activities. With regards to assistance with housing, it can be a stressful experience for an expatriate if he/she does not speak the local language or know the local rules and regulations (ibid). In contrast to what was mentioned in the literature (Canhilal, 2014), an allowance for accommodation was included in the SIEs' expatriation packages, but the level of assistance and support offered by the companies to SIEs differed depending on the job title or if a company offered such support.

In the case of Interviewee 25, a Greek SIE working in a Qatari shipping company, he admitted that his general adjustment was smooth as his company gave him full support and he did not face any red tape until he settled in Qatar. Such support allows SIEs to focus on their job as they are less stressed with searching for an apartment and dealing with bureaucracy:

> *I couldn't say I faced any significant issues, you know...The company takes care – because it's semi-governmental, I would say, so it takes care of all the procedural staff. We are free of any bureaucratic hassle. So, I would say my adaptation was quite easy.* (Interviewee 25)

Two other individual determinants for expatriate adjustment are flexible attributions and resilience (Mendenhall et al., 2017). Both proved to be vital for SIEs in their general adjustment when faced with inconvenient situations with regards to securing accommodation and dealing with red tape in completing administration tasks. For example, Interviewee 4 was promised permanent accommodation, but she got temporary shared accommodation instead. Hence, she had to accept it and be flexible as quoted below:

> *But the temporary accommodation…it was a year but it never turned into permanent accommodation. So, there was a lot of people would move into my accommodation during the night, because it was shared accommodation. Nothing had been set out to me before I arrived. I had thought I would be having a four-bed villa, that was my offer. But the big thing I've learned here is that you can't have very high expectations. You just don't really know what's going to happen. In the beginning and until today, it teaches me that I have to be very accepting of what's going to happen and not be too rigid in my own idea of what should happen. It just doesn't work that way.* (Interviewee 4)

With regards to social life, the majority of the subjects were married but were living alone in the GCC countries. Hence, they spent a lot of their free time with their own community, taking part in various events and pursuing their hobbies. Few interviewees had the opportunity to socialise with locals. This is the case in Qatar and UAE as locals are a minority in these countries. Hence, in many cases SIEs were socialising with compatriots. That was the case with Interviewee 19, a Lebanese SIE in Qatar, Interviewee 6 from Greece working in a Saudi Bank as well as many Irish SIEs in Saudi Arabia, as, according to Interviewee 5, they used to live all together in a shared compound. It was therefore very natural that "living in a bubble" was mentioned by a number of SIEs, including Interviewee 5:

*The immersion in the culture here is very limited. To be honest, we live in a little bit of a bubble…I'm living on a compound. Practically all expats here live on compounds...We have a buffet in the restaurant in our compound here. And there is a table, which has become unofficially known as the Irish table. Where all the Irish people assemble. And last Thursday it was the largest crowd. There were 18 of us at the Irish table. And they were all Irish. It was just a token Irish table. So, that's obviously pleasant. Last evening…I play in a ballad group, Irish ballads… and we played in another compound last evening but there wouldn't have been any Saudis at that gig at all. In fact, they're not allowed onto the compounds. So, immersion into the culture is very limited, I can tell you.* (Interviewee 5)

In general, most SIEs expressed the view that since they were alone in the GCC countries without their families, they had more spare time outside work to socialise and pursue their hobbies, as in the case of Interviewee 5.

On the other hand, adjusting to the GCC countries' culture was easier for an Arab Muslim SIE. For example, interviewee 30, an Egyptian SIE based in Dubai, lived alone, but as a Muslim he found it easy to adapt in the UAE, which is a cosmopolitan location compared to the KSA:

*No, it was really easy. The Gulf is Arabic countries. So, for myself, I'm Muslim. It was like my country. I didn't find any difference in Dubai itself. Only at work. The work is a bit different than my country…It's hard to work on the site, especially during the summer, the high degrees. But to deal with people outside of work, no, it's the same culture. It's an Arabic country, Muslim country. I found the mosque, halal food everywhere, of course. So, it was for me no difference. Nothing.* (Interviewee 30)

Family and spouse adjustment play a vital role in the general adaptation of an expatriate (Black et al., 1991). That was not, however, the case with most interviewees as they came alone to the GCC countries but being away from their families was a challenge faced by most SIEs and one of the most important reasons for seeking repatriation in the future. That was the case with an Irish subject working in KSA:

*No, I sort of review it every six months. I just see if the employment situation picks up in Ireland. I would be keen to come back, very keen,* *because my family is still there. And I'm living here as a bachelor. So that's why.* (Interviewee 10)

In summary, this section delineated the three subjective features of adaptation according to Howe-Walsh and Schyns (2010): work adjustment, general adjustment and interaction adjustment. It seems that it took Western SIEs longer to adapt to the GCC countries culture compared to Arab and Asian SIEs. This was the case due to the cultural incongruity of the GCC countries and the home countries of Western SIEs, while Arab and Asian SIEs' acculturation was smoother due to the considerable "cultural overlap" (Mendenhall and Oddou, 1986) between their countries and the GCC countries. Evidence in literature shows SIEs' inclination to find a job abroad as a vital motive for them (Froese, 2012). This tendency was positively linked to my findings pull and push factors discussed at the beginning of this chapter. Moreover, the fact that the majority of SIEs in my research have remained in the GCC countries for an average period of six years would indicate a relatively good level of work, interaction and general adjustment.

In the following section I discuss one exceptional case of SIE who could not adjust to the new environment and left the KSA to start a new assignment in Bahrain.

### 5.7.4 Lack of Adjustment

In a few cases SIEs could not adapt to the local strict Islamic culture, as in the KSA, or did not have a good relationship with their local stakeholders and colleagues. They therefore left the host country as soon as they were able to find a job position in another country. That was the case for Interviewee 20, an Irish SIE who was working as an associate director in a construction company in the KSA from June 2013 until January 2016. He did not have a good relationship with the local stakeholders and did not appreciate his local colleagues or the local Islamic culture and, as a result, accepted a new job position in Bahrain and left the KSA. In the following quote it is obvious how he re-examined his course of action regarding his future and decided to relocate to Bahrain for the sake of his career:

*I felt that my time in Riyadh, I couldn't do anymore, I had come to an end and for the sake of my career – Everybody wants to advance their career and continue to learn and be the best they can be. It influenced me to get the hell out of there. If an opportunity didn't come up, I would say I would* *definitely, definitely be leaving this summer. I'd have given myself another six months and I'd probably look for other opportunities in a different company or something like that. So, I was happy this came up in Bahrain...It's not for everybody. It's quite a challenge...I've had enough of Riyadh. I wouldn't go back...So there's two buckets. There's the shit bucket and there's the money bucket. And whichever fills up first, you've got to go. So, if you've had enough of the whole Saudi experience, you've got to go, and if you've got enough money, you've got to go. It's different. Dubai and Bahrain – and Doha, to an extent – are different. You can have a life here [in Bahrain]. You can go to the cinema. You can take a girl out for dinner. You can go for a beer. You can have a normal life – normal by our standards, by what we culturally know to be normal. You can have your normal life here. It's not the same [in Saudi Arabia]. There's restrictions.* (Interviewee 20)

Table 5.4 below includes one example of 'illustrative extract' (Braun and Clarke, 2006) regarding the main themes of SIEs experiential learning cycle that were documented in this findings chapter. Appendix G represents a summary of such illustrative extracts.

**Table 5.4: Representative Quote from Associated Themes**

| Experiencing |
|---|
| "You see, I grew up in an environment where, you call it exactly as it is. You don't sugar coat it, you don't undercoat it, you just say it the way it is, and you expect the other people to be a good sport about it, take it constructively and actually give you the same feedback whenever you need it. I realized in the first few months that it requires much more sugar coating in Saudi, especially to give feedback to somebody, especially if the feedback is not really all positive and it can only be taken constructively if it's given in a very blurred, open environment. It has to be done privately, cannot be done in front of other people because the egos start to be a short temper. And although the person will accept your feedback openly, if you've given negative feedback, the person will not take it constructively and will actually not say it on your face and will keep it inside and actually blow it into a negative energy... I particularly felt it with the folks in the Arab world. They tend to like things to – they will accept feedback, they will gladly improve themselves as well, but they want it to be very sugar-coated as well...the first time I offered my advice, the person was silent, said, 'Yes, I agree with you' and I actually thought that the conversation was over. But I got approached by him later on and he said, 'Look, you know, I didn't appreciate that you exposed my weaknesses to people, members of the project team". (Interviewee 29) |
| **Reflecting** |
| "And I was taken aback, and realized and I apologised, because I must respect the cultural norm. I realized that it is a cultural norm, because it is not just this person. I realize a pattern, that this is consistent, and I have to rectify myself". (Interviewee 29) |

| Thinking |
|---|
| “In terms of relationships. Above all, it was a hindrance in terms of me making relationships with my colleagues and ever since I have rectified myself, it has helped me make my relationships effective with my colleagues. And I am completely a relationships guy. That's all I thrive on.” (Interviewee 29) |
| **Acting** |
| “Now it's actually very comfortable for me to identify an issue and address it. And it actually helps me now because if I do it alone with that person, that person is willing to listen more and offer much more interactive feedback. So, it works out well. But, yeah, it was a curve, at the beginning.” (Interviewee 29) |
| **Adjusting** |
| “It was different than America, of course, especially Saudi culture, and it was very different than Pakistan as well. So, it was a fairly interesting first one year for me and the family to settle down, and find our own little niche, our own community, and establish a sense of belonging. So, I would say the first year was a very interesting and enlightening experience because even though, as Muslims, you think that the culture would remain the same. The culture is very different from one Muslim country to the other…So it was a unique experience for me.” (Interviewee 29) |

## 5.8 Conclusion

This chapter presented an analysis of SIEs' learning and development of GLC during their working experience in MNEs and local public and private companies within five countries in the GCC countries. The discussion focused on the five key themes that emerged from my theoretical thematic analysis. The findings in this chapter showed the experiential learning cycle and adjustment that each SIE went through in order to develop global leadership skills and cited examples within each theme of the social and professional behaviour adopted by the SIEs. The findings also outlined the global leadership competencies that were displayed by the SIEs according to managing self and managing people and relationships GLC categories that were proposed by Mendenhall et al. (2017). The next chapter will consider the implications of these findings in further detail.

# CHAPTER 6

# Discussion and Conclusions

## 6.1 Introduction

The objective of this study was to explore the impact of an IA on the development of GLC of SIEs within the context of the GCC countries. These challenges varied in mildness or toughness and in most cases were negatively perceived by the SIEs but nonetheless much was learned from these incidents. The second was to identify the global leadership competencies that SIEs developed while working in the GCC countries.

This chapter summarises the main research questions and provides an overview of the importance of this study, how the gap in the literature was addressed and the contribution to knowledge achieved. Conclusions are then presented based on the findings. In addition, the practical and theoretical implications of the study are presented, as well as the research limitations and some recommendations for future direction.

## 6.2 Revisiting the Main Research Questions and Objectives

In this study the researcher attempts to explore the following primary research question:

*How does an international assignment impact on the development of global leadership competencies in the case of a self-initiated expatriate in the context of the GCC countries?*

Moreover, this study seeks to address the following secondary question:

*Which global leadership skills are required to be a successful SIE leader within the context of the GCC countries?*

In the next sections the theoretical implications of the findings are developed in detail. The resultant contribution to knowledge in the different domains is then identified based on the outcomes of the empirical work. Implications for both theory and practice are thus drawn out. Finally, the limitations of the study are discussed, along with the implications for further research.

## 6.3 Theoretical Knowledge

This study was designed to explore the impact of SIEs' international working experience on developing global leadership skills by establishing the relationship between challenging critical incidents experienced by SIEs and the GLC developed and displayed within the cultural and business context of the GCC countries. Hollenbeck and McCall (2001) and McCall and Hollenbeck (2002) have referred in their general model for developing talented global executives to the end-state of development (Mendenhall et al, 2017). That is “what” type of lessons global executives must learn on their IAs (i.e cultural issues, leading and managing others, etc). These scholars however did not provide in their model or empirical study detailed accounts of “how” such lessons or skills were learned via hardships during the executives' international working experience.

With regards to learning from experience during an international assignment, Hollenbeck and McCall (2001) posit that expatriates are exposed to deficient connections with the headquarters at the home country, repatriation problems and family constraints. Moreover, they argue that it is the global executives' responsibility at 95% to learn the lessons of culture in the host countries. This argument contradicts articles in the literature about the support offered to CEs from the headquarters before and during an international assignment. On the contrary, my findings suggest that SIEs had to rely on themselves as in many cases companies in the host countries did not provide much support during the first few months to SIEs in order to have a smooth adjustment. But although that was the case, SIEs showed motivation to learn and adapt and many received support from a compatriot living and working in the host country. The findings showed that most SIEs did adapt to the cultural context of the GCC countries. Overall, the findings in this thesis are in agreement with articles in the literature regarding the positive interaction and general adjustment of SIEs during IAs

(Froese and Peltokorpi, 2013; Peltokorpi and Froese, 2009; Peltokorpi, 2008; Froese, 2012).

On the other hand, my study adds to theoretical knowledge by blending the theoretical approaches of experiential learning, sensemaking, impression management and the cycle in cognitive processing, which provide the conceptual basis for understanding the mechanism by which SIEs learn and develop global leadership competencies within the context of the GCC countries. I argue that the missing link of such mechanism is the automatic and conscious cognitive modes (Louis and Sutton, 1991) that contrasts SIEs reliance on an "automatic mode" due to the habits of mind when at home in a familiar cultural context and switching to a "conscious cognitive mode" within an unfamiliar cultural context when experiencing a critical incident.

The findings of this study indicate that SIEs went through a learning experience of four stages when confronted to a cultural trigger event in order to display a new leadership skill at the fourth stage of learning through a conscious mode. For example, interviewee 29 experienced a negative critical incident when an Arab colleague expressed his embarrassment as he criticised him openly in front of other colleagues. The American Pakistani SIE admitted that he was "taken aback" by the remarks of his Arab colleague as his behaviour would be considered normal in the USA. This reflected the "automatic mode" (Louis and Sutton, 1991) of his behaviour as if he was still managing in the USA. As a result, he had to reflect on this incident in order to make sense as to what triggered this event. He realised the difference between the American way of "just say it the way it is" when it comes to give feedback and the need for "sugar coating in Saudi". Hence, he "sensed a condition for switching" (Ibid) his behaviour. His interpretation identified a consistent "pattern" as other Arab colleagues complained about losing face from receiving such negative feedback in front of other colleagues. Consequently, he thought he had to "rectify" his behaviour (sensebreaking) in order to "respect the cultural norm" by "switching to a conscious cognitive mode" (Ibid) which meant delivering privately a negative feedback next time to an Arab colleague. Accordingly, having learned his lesson, in his next feedback to Arab colleagues he acted in a "conscious mode" (Ibid) by displaying empathy as a component of emotional intelligence (sensegiving) by adapting his cross-cultural communication skills. Such challenging situation had the needed "developmental components" (McCauley et al., 1994) for the SIE to learn from by behaving with empathy to save the face of an employee when giving negative feedback. That is the case as in such learning situation he had the opportunity to frame correctly the incident, make attributions and select a culturally appropriate script for this situation. Moreover, such challenging situation was a source of motivation to learn in order to avoid a negative outcome by having a good relationship with his employees.

In order to contribute to knowledge as discussed by Lawler et al, (1985 quoted in Farndale, 2004, p. 250) "…the outcome must contribute to theory and the body of knowledge". I will now discuss in the next section my thesis contribution to theoretical knowledge. Table 6.1 below includes my overall study's contribution in all five domains.

### 6.3.1 Conceptual Framework Contribution

In support of the original work on cultural trigger events carried out by Reichard et al. (2015) via the inductive approach used in thematic analysis, this study has found support for the positive relationship between a trigger event such as "cultural shock, leading to a disturbance in an individual's world view, which demands one's attention and causes that person to stop, think and reflect" as described by Lyon (2002, cited in Reichard et al., 2015, p.463) in order to develop cultural competence. As a matter of fact, my study showed that one third of Western SIEs admitted facing a cultural shock upon their arrival in the GCC countries. During the first 6 months to 18 months they came across various critical incidents mostly of negative nature. Interviewee 4, a British woman SIE working in a Qatari hospital noted the following in expressing her cultural shock with regards to her assignment in Qatar: "nothing would have prepared me for such a transition to such a conservative Muslim country". A British SIE was confronted with a cultural triggered event when a Qatari woman made a complaint as the British SIE let a man sitting in the all ladies' office with the Qatari woman. Such a cultural triggered event made her reflect and think about what went wrong as she admitted "I just didn't know culturally that I 've done something wrong". My thesis findings showed that as SIEs were taken by surprise, they had to think and reflect in order to learn and develop leadership skills suitable for the specific cultural context.

Many articles have been published with regard to intercultural sensemaking, starting from Louis (1980a) and Louis and Sutton's (1991) ground-breaking work on surprise and sensemaking (Glanz et al., 2001; Osland and Bird, 2000; Bird and Osland, 2006; Osland et al., 2007). But these studies conceptual and not empirically tested and only (Louis (1980a) presented a theoretical framework on sensemaking. Hence, in terms of theoretical development, my thesis has emphasised the role of cross-cultural sensemaking within the theoretical framework via reflecting on challenges during the critical incident.

**Table 6.1: Domains and Extent of Contribution**

| ***Domains of Contribution*** | **Extent of Contribution** | | |
|---|---|---|---|
| | **What has been supported** | **What has been developed** | **What has been found which is new** |
| ***Theoretical Knowledge*** | Triggered events as a wake-up call for expats in order to reflect on what went wrong. | Intercultural sensemaking theoretically developed within my conceptual framework. | Blending three theories in my theoretical model to show the mechanism of developing global leadership skills via experiential learning. |
| ***Context*** | Toughness nature of the GCC countries for expatriates confirmed. | Tightness and looseness of GCC countries developed. | Integrating SIEs from both developed and developing nations in order to contrast how they dealt with contextual challenges in GCC countries. |
| ***Empirical Evidence*** | Different cultural context requires different global leadership skills to manage efficiently. | Ad hoc strategies used by SIEs to learn global leadership skills were highlighted. | Empirical process by which SIEs developed and displayed new global leadership competencies adequate to the GCC cultural context. |
| ***Methodological approaches*** | The value of combining the critical incident interviews with a phenomenological approach. | Capturing verbal descriptions of SIEs learning experiences. | - |
| ***Knowledge of Practice*** | Lack of any kind of training and development offered for SIEs in GCC countries by local companies asserted. | The use of local mentor by organisations in order to support a SIE manager. | The need for dissimilar kind of cross-cultural training for SIEs from developed and developing nations in the GCC countries. |

(Original framework: Farndale, 2004)

Moreover, my empirical study showed that interviewees "sensed the conditions for switching their behaviour" (Louis and Sutton, 1991). For example, interviewee 22, an Irish SIE working in KSA as a sales director, his strategy to listen intensely in order to make sense of what has been said.  He noted: "the more you listen, the more you learn…You've got to listen intensely…The learning curve is, what does he really mean here? That is the question to ask yourself".

The contribution to the self-initiated expatriation and GLD literatures is by firstly addressing a sample of SIEs instead of CEs in order to broaden our understanding of developing global leadership skills within the context of a developing region such as the GCC. Hence, answering calls from (Zhang et al., 2012) about the lack of indigenous leadership research in non-Western context. Secondly, by proposing a theoretical model that links the challenging context of the GCC countries to how SIEs learned and developed the distinct global leadership skills required for that region by comparing and contrasting the learning of SIEs from developed and developing countries. In the right stuff model (McCall and Hollenbeck., 2002) the empirical study highlighted what was learned from the global executives within three continents and compared their results to a study they have done in the 1980s with US executives. Hence, the researchers deducted that the global executives had cultural wise a broader outlook on the world than their US counterparts. Moreover, the focus of the model and empirical study was on the lessons learned not the mechanism on how global executives have learned these lessons.

To the best of my knowledge, there are three more theoretical models on the development of global leadership in the literature (Mendenhall et al, 2017), namely the Chattanooga model of global leadership development, the global leadership expertise development model (GLED) and the Kozai learning and transformation model (Osland and Bird, 2017), but all three conceptual models lack empirical evidence. Figure 6.1 below brings together the theoretical insights emerging from the current study findings, which the following discussion will highlight.  In the next section the context of the GCC countries is discussed.

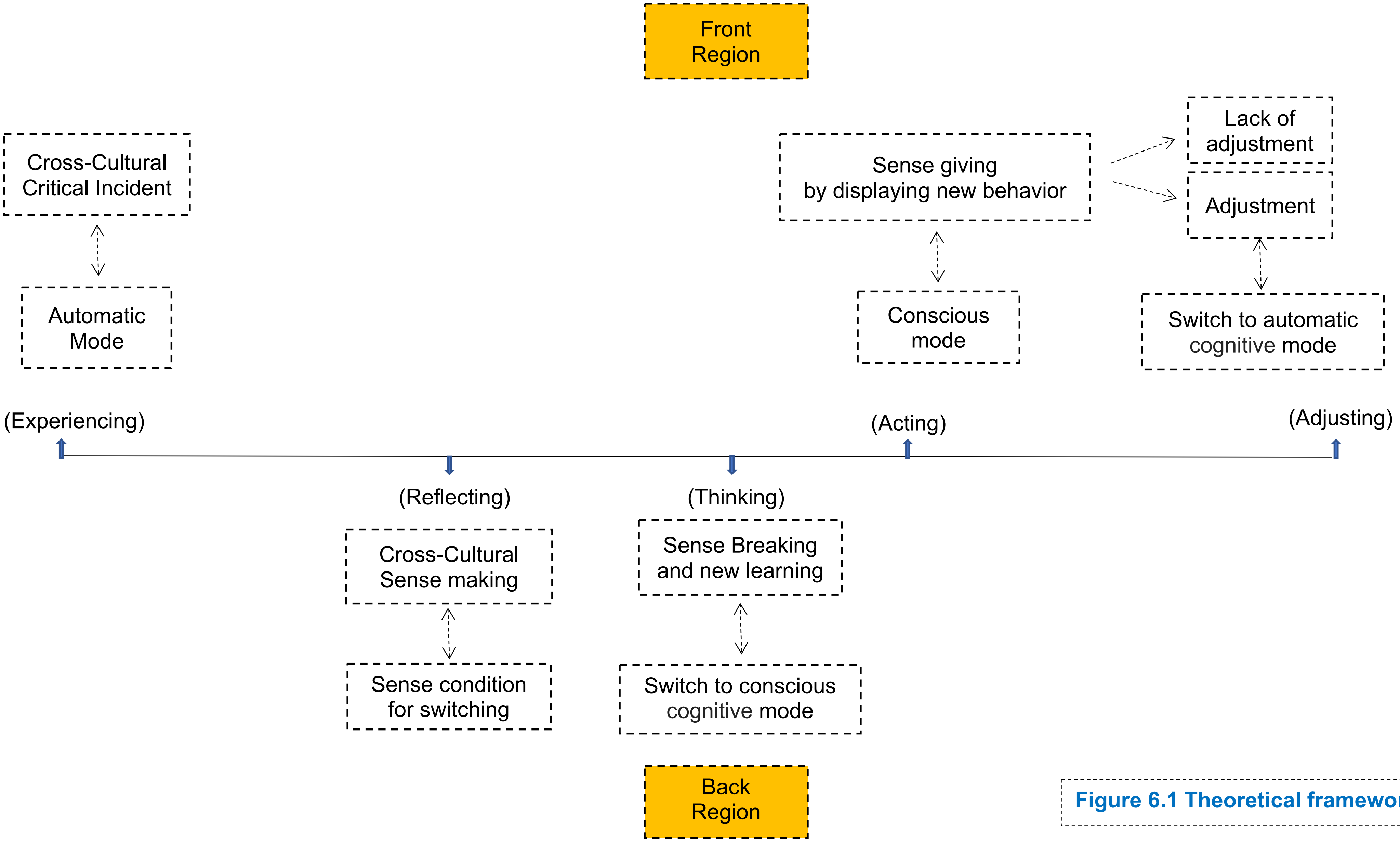



**Figure 6.1 Theoretical framework**

## 6.4 The Context of the GCC Countries

Several researchers have criticised the fact that expatriation studies as overly focused on corporate expatriation in North American multinationals (Collings et al., 2007; Cappellen and Janssens, 2008) although in our current globalised world expatriates accept assignments within all continents. Moreover, in spite of the fact that a global workforce and many MNEs do operate in the GCC countries (Baruch and Forstenlechner, 2017), studies about expatriation in this part of the world are scarce. As a matter of fact, few studies related to SIEs were conducted within the GCC context on various topics such as training and development (Stalker and Mavin, 2011), adjustment (Isakovic and Whitman, 2013; Alshammari, 2012), career capital development (Rodriguez and Scurry, 2014), work-related attitudes and job characteristics (Bhuian et al., 2001), job satisfaction and turnover intentions (Bozionelos, 2009) and narratives of identity (Scurry et al., 2013). But no previous studies within the context of the GCC countries were related to SIEs learning and development of global leadership skills, hence, the importance of my thesis with regards to the challenges met by SIEs in this cultural and business context and the required GLC in order to be successful as a manager in such environment.

In few empirical studies on global leadership skills with regards to CEs assignments abroad, no specific country or regional context was chosen. For instance, in Hollenbeck and McCall (2001) study 101 managers were interviewed within three continents in 34 cities. Moreover, in Yeung and Ready's (1995) research, 1,200 managers were interviewed within eight countries. As for Caligiuri and Tarique's (2012) study, 420 global leaders were surveyed working in three multinational companies worldwide. In these studies, general lessons learned, and a list of global leadership skills were discussed. Hence, there was a lack of emphasis on specific cultural and business challenges met by SIEs from developed and developing countries within the context of a developing country or region. As a result, a missed opportunity to compare and contrast SIEs strengths and weaknesses depending on their cultural background in learning and developing the required global leadership skills within a specific context such as the GCC countries.

My findings demonstrate that the GCC countries represent a challenging environment for SIEs to live and work. As a matter of fact, one third of interviewed subjects, all of them Western SIEs, mentioned that their assignment in the GCC countries was a “cultural shock”. The following quote from an Irish SIE in KSA explains the reasons of such cultural shock: *“But a massive culture shock. And a massive steep learning curve with regard to ideas, behavioural traits, expectations, motivational traits, etc. Completely opposite to anything I had experienced before. And that is a big shock”* (Interviewee 8). That fact is in alignment with the literature regarding the cultural toughness dimension of the Middle East region which includes the GCC countries (Mendenhall and Oddou,1985;1986). An interesting finding of my study was that SIEs from developed countries encountered cultural and business challenges within the context of the GCC countries that SIEs from developing countries did not experience. As a matter of fact, an Egyptian SIE working as an engineer in UAE confessed that “*No, it was really easy. The Gulf is Arabic countries. So, for myself, I am Muslim. It was like my country. I didn’t find any difference in Dubai itself. I found the mosque, halal food everywhere of course. So, it was for me no difference. Nothing”* (Interviewee 30). Hence, this thesis confirms what has been argued in the literature that expatriation studies within developing countries are vital as such regions would exhibit dissimilar national, organisational and individual characteristics from developed countries (Al Ariss and Guo, 2016), consequently, leadership development techniques will need to be adapted to the national context (Gao et al., 2011).

The main reason for experiencing such challenges by Western SIEs is that GCC countries as other Arab countries in the Middle East belong to collectivist cultures (Hofstede et al., 2010). The main attributes of a collectivist culture, in contrast to individualist culture, are the interdependence of self with the members of ingroups (family and tribes) rather than autonomy and independence of groups according to Triandis (1995). The inclination to goals that are consistent with ingroups’ goals instead of personal goals. Social behaviour is based on norms not attitudes. Finally, the individual’s priority in a collectivist culture is the needs of the ingroup not personal needs. Collectivism is said to be highest in societies that are low in complexity and tight and in which collectives have resources to dispense (Triandis, 1996). That is the case of all wealthy Islamic societies of the GCC countries.

The cultural context of the GCC countries has proved in my study to be unique regarding the cultural challenges encountered mainly by Western SIEs. From the findings of my study such challenges met by the SIEs were due to the lack of specific leadership skills required within the unique cultural context of the GCC countries. As a matter of fact, such scarcity of skills in need according to Eisenberg et al. (2013, p.323) is due to:

> ...the rapid shift some countries have or are experiencing from cultural homogeneity to cultural heterogeneity places a premium on managerial skills in creating and sustaining a diverse and socially inclusive workplace. For example, in 2010, foreign- born individuals made up 82.9% of the United Arab Emirates population (Migration Policy Institute, 2013; Organization for Economic Cooperation and Development, 2013). This new state of affairs has created the acute need for managers to understand the impact of cultural differences on organization members' behaviours.

For instance, with regards to looseness and tightness of GCC countries, the UAE and Qatar would be considered loose cultures (Triandis, 1994) as locals are a minority in both countries with native population being (11% and 15%) respectively (Sidani and Al Ariss, 2014). In addition, in such loose societies as the UAE and Qatar where locals are a minority there is a majority of Asian skilled and unskilled workers belonging to collectivist cultures as well. Hence, although Islamic laws apply, these two countries would be considered heterogeneous and pluralistic cultures with regards to the norms to follow. As stated by the Lebanese interviewee 19 based in Qatar: *"Now, if you're talking about the culture of this country, you have to be honest that most people here are expats. So, I don't really have a culture to follow. Every nationality gives it its own culture"*. Dealing with such diverse populations composed mainly of a minority of locals and a majority of Asian and Arab high and low skilled immigrants was a struggle for Western SIEs with an individualistic cultural background. The following quote emphasise this point; *"The cultures are diverse here. And you have to be very well aware and on your wits' end everyday…and they've all got their own ways and wants. And, wow, it can be a minefield at times"* (interviewee 27).

With regards to KSA, Kuwait, Bahrain and Oman these nations would be considered as “tight cultures” (Triandis, 1994). That is the case as these countries have a cultural homogeneity, hence, norms and traditions to follow are clear and sanctions are imposed in the event of deviation. Hence, in such conservative cultures the norm of a leadership style would be paternalistic and autocratic in antithesis with leadership styles in developed countries which would be participative and egalitarian. For example, interviewee 3 an Irish SIE working in KSA mentioned how despotic was the behaviour of local managers towards their employees:

> *I mean the work culture here is very autocratic. There’s a big focus on power. And there’s a big focus on being hard on people...The local work culture is that employees are very respectful of the boss and the boss can be tough on them, maybe unfairly so.* (Interviewee 3).

In the previous example the Irish SIE had to exert his leadership skill as a mentor by using stories on how employees are motivated and managed in Ireland. Such tough behaviour on employees from local managers was consistent with the literature with regards to Arab managers leadership styles (Kabasakal and Bodur, 2002), as in such collectivist cultures hierarchy is the norm, hence, followers have to obey and respect their superiors. In several cases Western SIEs clashed with Arab managers due to different leadership styles as aforementioned. Hence, they had to avoid criticising these bosses and use consultation in order to solve such conflicts.

Despite the tightness and looseness of the six GCC countries, some norms and policies do apply to both groups of nations, which creates a challenging environment for women SIEs from developing and developed countries adjusting and excelling in their roles as managers. Such challenge from the findings is gender discrimination and patriarchal attitudes and practices towards women leaders as pinpointed by the British SIE working in a Qatari hospital; *“I would say that generally women have to get used to getting less respect”* (Interviewee 4). As for the Canadian SIE that was working in a Saudi hospital as an executive director of nursing, she shared her view on how she used a mix of soft and hard skills as a woman in her managerial position in order to lead in such culturally tough workplace for women:

> *Roles of authority are hierarchical. Executive Director and Deputy Executive Director are held accountable for performance for decision making. A single woman on an all-Male Arab senior team comes with its opportunities to influence in a different way. Through using a lower key approach and deference to authority, suggestions versus a hard stand on issues. Evidenced based decision making using Western philosophy in business and US / Canadian health care practice examples is accepted and sought after.* (Interviewee 2)

Such gender discrimination has been documented in the literature with regards to the UAE for example (Stalker and Mavin, 2011). But such mentality has been changing as the country has been ranked as best performing country in the region in closing the gender gap (Gulf Business, 2018). Such change has been underlined by a British SIE working in a multinational company in Dubai as an HR manager. But as discussed earlier, however loose might be the culture in the UAE and a cosmopolitan city as Dubai, Islamic values and customs must be respected:

> *I believe that if a person values business relationship within the workplace and is prepared to spend time on building these relationships, then being female, has little impact on the success a woman can achieve. That said, historically there are a lower number of females at the top level in Dubai although that is changing. I believe that one of the correlating reasons why being female does not massively enter the equation, is because Dubai is such a multicultural environment and many people who are in the business world are used to seeing and dealing with women in business. However, it is worth noting that if a woman were to ignore the cultural norms of Dubai and the wider GCC then offence could quickly be caused and impact relationships accordingly.* (Interviewee 11)

The context of the GCC countries is interesting due to the diversity of the challenges encountered by Western SIEs, thus the learning opportunities with regards to tight and loose cultures within the 6 countries' various organisations (local public/private and MNEs) and sectors. Hence, as illustrated in the findings the requirement to develop specific global leadership skills that a SIE manager needs to have in his/her repertoire to lead successfully within the GCC countries context. Interviewee 11, a British SIE working in Dubai as HR manager in a multinational, had the opportunity to have two previous assignments in Kuwait and Bahrain. She describes below the differences between the cultural learnings for her within these three diverse Arab Islamic countries with regards to cultural tightness and looseness:

> *I think I'm really glad I did the countries in the order I did. Because out of the three, Kuwait is actually probably the strictest. But what that did teach me more than certainly the UAE, it taught me a lot more about the Arab way of life, the reasons why things are there. For example, I learned a lot about things in the Koran that I don't think I would have learned here in the UAE – because it's a lot freer here and a lot more multicultural. Whereas Kuwait has kept its identity. If you are there, you are choosing to live in the Arab world, in the Muslim way of life. And I think Bahrain is almost the happy medium. So, there's a little bit of strictness, but there's still a relaxed approach to things. And obviously Dubai you could be anywhere in the world. So, I think from a cultural immersion point of view Kuwait was one of the best places to learn about the genuine culture and what it's all about. I think Bahrain gives you that flexibility to truly mix the two cultures in terms of the social side of it. And Dubai, I think if I hadn't gone to Kuwait for example, I wouldn't have the understanding I have now.* (Interviewee 11)

As explained by interviewee 11, cultural learning in "strict" Kuwait as a tight culture was different from "lot freer and more multicultural" Dubai as a loose culture. Hence, the diverse experiential learning and required set of leadership skills depending on the tightness or looseness of the culture. Such evidence of diverse cultural learning was even more evident for interviewee 11 between working for an Arab company with authentic Arab culture in Kuwait and Bahrain and a multinational company with a Western culture in Dubai.

Interviewee 22, an Irish SIE working at the moment as a commercial consultant in the KSA. He has been working in the KSA for nearly 20 years in various assignments. He confirmed the aforementioned view of interviewee 11 regarding his two dissimilar working experiences in a local company and a joint venture (Arab Irish):

> *I found I adapted better to the culture when I worked with (name of first company). It was a truly Arab company. Whereas working in (name of second company), it was a very Western culture and you didn't connect as much with the local culture because it was all Westerners. It was a Western system and you didn't empathise and embrace the Arab culture.*

> *In fact, working for (name of first company) was a richer experience.* (Interviewee 22)

Such evidence is backed by the literature as according to Scandura and Dorfman (2004) the large numbers of MNEs with offices all over the world has led to the diffusion of Westernised management practices through corporate training and development which resulted in the adjustment of the employees to the company's culture but not necessarily to the country’s culture.

Beside the challenging cultural aspect of the GCC countries mostly for SIEs from developed countries, doing business was tough for both SIEs from developed and developing countries due to the social, political and financial environment in the region referred to in the findings chapter. As stated by Interviewee 1, a British SIE working in a Qatari hospital:

> *This is a difficult environment to get things done…The culture here is not collaborative…leadership is not straightforward and it’s not a substitute for very sound management practices”.*

The learning for the above subject supported by his Arab manager was to have an approach as he was quoted “highly collaborative, highly consultative, highly respectful.

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The next section considers the contribution of this thesis regarding the cultural and business context of the GCC countries.

### 6.4.1 Contextual Contribution

This study’s findings supported the literature review (Konanahalli et al., 2012) with regards to the toughness of the cultural context of the Middle East (work related and non-work factors) with regards to SIEs from developed countries. Moreover, this study has showed that Western SIEs struggled to adjust to the GCC countries Islamic conservative and hierarchical societies with rigid rules regarding the expected behaviour from men and women. For example, an Irish SIE who worked in the construction sector as a quantity surveyor in Riyadh pinpointed that the KSA *“is not for everybody. It’s quite a challenge”* (Interviewee 20).

Although the GCC countries are conservative Islamic societies, this thesis developed contribution is highlighting the looseness and tightness between countries in the region. As a matter of fact, the findings in this thesis revealed that several SIEs had a first assignment in KSA but then moved to the UAE or Bahrain for a second assignment due to the looseness of both countries in comparison with KSA. As quoted by interviewee 20 *"so it can be challenging in Saudi. Bahrain, less so. More normal, less challenging".* One such characteristics of tight countries is the restricted access to and use of new communication technologies (Gelfand et al., 2011). That is the case in the UAE and KSA where skype is banned and What's app is blocked (ZDNet, 2017) which prevent the large number of immigrants in these countries to be in contact with their families back home. On the other hand, Dubai and other Emirates would be looser as a nation in contrast to the KSA regarding alcohol consumption which is permitted for tourists in hotels and at home for resident holders with liquor license. Such categorisation of the GCC countries in loose and tight cultural wise is crucial as the findings of my thesis showed that in such tight cultures, SIE leaders would be challenged in order to bring a culture of change management. That was the case for example with interviewee 13 an Irish SIE working in a Bank in the KSA as a chief advisor when he introduced an appraisal based on performance not seniority. He admitted that "the first engagement regarding the evaluation was hostile". Same case with interviewee 16, an Irish SIE working in a construction company as an architect in KSA. He asked his employees to prepare post evaluation for all projects including time sheets recording the time they spend working on each project. He disclosed that *"the effect it had in the office a bombshell"*. These two outlined examples extend the argument discussed by Gelfand et al. (2011 cited in Aktas et al., 2016, p.304) that "people in loose cultures expect that when change occurs, it happens incrementally, whereas people in tight cultures expect that when change occurs, it has to be catastrophic". Hence, the importance in this case to include in SIEs training programs the characteristics of tight and loose general and business culture of the GCC countries.

The discussion above contributes to calls for more research in diverse cultural contexts that may require distinct skills for efficient leaders (Gutierrez et al., 2012). In addition, it contributes to calls for more studies in the reasons for divergent perceptions of leadership in the Middle East than those in the West (Scandura and Dorfman, 2004). Such expatriation studies within developing countries are vital as such regions would exhibit dissimilar national, organisational and individual characteristics from developed countries. Indeed, my research findings revealed that SIEs from developed countries confronted diverse challenges and contrasting experiential learning than SIEs from developing countries within the cultural and business context of the GCC countries.

My study enriches SIE knowledge and literature by integrating SIEs from both developed and developing countries working within a developing region in order to identify the outcome of the context on SIE experience as such studies are in shortage (Doherty et al., 2013). Moreover, due to the paucity of qualitative studies on cross-cultural dissimilarities with regards to leadership skills or characteristics in various business contexts (Gutierrez et al., 2012), Hence, the novelty of my contribution in this thesis is addressing the gap in knowledge with regards to the cultural and business challenges encountered by expatriates and more specifically by SIEs leaders within the GCC countries. Moreover, this study compares SIEs from different cultural backgrounds (collectivist and individualist cultures) in a particular cultural and business context (GCC countries) which would require the development of distinct global leadership competencies to manage effectively a unique and large mix of international employees. The findings of my study showed that SIEs from developed countries had to learn and develop a new repertoire of global leadership skills that were appropriate to the cultural and business context of the GCC countries. Whereas SIEs from developed countries were familiar with the cultural background of this region coming from a collectivist culture but had to learn the unique characteristics of the business context of the GCC countries including the policy of nationalisation of the workforce and salary discrimination against expatriates from developing countries.

The next section examines the empirical evidence of my study and its contribution.

## 6.5 Empirical Evidence of Study

A key contribution of this research is the empirical evidence on how SIEs from developed and developing countries learned from working experience and developed new global leadership skills during their IAs in the GCC countries. In the next section the cultural challenges met by SIEs are discussed. Second, sensemaking strategies are examined. Third, lessons learned are highlighted. Fourth, new global leadership skills are considered. Lastly, the contribution to empirical study is presented.

### 6.5.1 SIEs' Challenging Experiences

The findings of this study illustrate that SIEs experienced developmental events through mild and severe critical incidents while working in the GCC countries. These triggered events led SIEs to reflect and make sense of what has happened and how they should behave according to the local culture. Such events "interrupt people's ongoing flow, disrupting their understanding of the world and creating uncertainty about how to act" (Maitlis and Christianson 2014, p.70). Such developmental events encountered by the SIEs in the GCC countries were similar to developmental events mentioned within the literature that took place locally in the USA (McCauley et al., 1994; McCall et al., 1988). Such examples of developmental components include job transitions, creating change, high level responsibility, non-authority relationships, obstacles (McCauley et al., 1994) and setting the stage via early work experience and first supervisory job (McCall et al., 1988). But although these leadership development processes are universal across cultures, the findings of my study extended McCall et al's (2002, p.10) argument that "the experience that most starkly differentiates global from domestic development is…culture shock". As highlighted in the findings one third of the Western SIEs acknowledged that they experienced a cultural shock during their assignment within the GCC countries. Such cultural shocks were normal due to the cultural distance between Western SIEs individualistic cultures and the GCC countries cultures which are highly rated on in-group collectivism (Kabasakal et al., 2012).

In dealing with extreme critical incidents or cultural shocks as discussed in the findings chapter, SIEs had to make sense of novel situations through implicit learning that comes via living the experience (Stalker and Mavin, 2011). For example, in the case with interviewee 27, an Irish SIE working in KSA as an operations director for a foreign elevator manufacturing company. He encountered a developmental component of hardship due to business mistake (McCall et al., 1988). According to his habits of mind he thought that the safety policies in KSA will be followed with the same rigor as in Europe ignoring that safety standard vary drastically in the Middle East (Konanahalli et al., 2012). He reflected that "the rules were in place, but they weren't getting followed properly". The result of his lack of awareness as a newcomer to such novel and unfamiliar context was disastrous as two engineers were killed in a construction site. Moreover, interviewee 27 admitted after the incident that although "the elevator industry for an engineer is the second most dangerous industry in the world...it is not taken as seriously in Saudi Arabia as the rest of the world".

The findings in this study showed that in all triggered events, SIEs as newcomers behaved in an "automatic mode" (Louis and Sutton, 1991) out of habit of minds as they used their old roles back home which led to a discrepant situation (Figure 6.1). In conclusion, with regards to Mendenhall et al. (2017, p.342) question if "managers genuinely experience fewer hardships in some countries", my thesis findings highlighted that SIEs from developing countries experienced a fewer number of hardships in comparison to SIEs from developed countries as they were familiar with the collectivist culture of the GCC countries. SIEs had to resort to various strategies to make sense of the culturally challenging situations. The next section details the starting point for SIEs learning from cultural shocks by adopting ad hoc sensemaking strategies.

#### 6.5.1.1 Sensemaking Ad Hoc Strategies

One conclusion that can be drawn from the findings of this thesis is that SIEs had the desire, inquisitiveness and openness to learn about the cultural context of the GCC countries from day one. For example, interviewee 21, a Canadian-Finnish SIEs working in Dubai for a French multinational was quoted *"So you have to learn on the fly…For the first six months, I wasn't doing any business, I was listening, learning, building up relationships. That's what it's all about"*. As for interviewee 8, an Irish SIE working in KSA for a construction company pointed out that *"Right from the get go, and I mean literally from day one, I would have introduced and started sitting down with everybody that could* *possibly expose myself too…The first couple of months I just spent listening to be honest…to understand the situation."* This conclusion is consistent with the proactive approach taken by leaders according to McCall (1994) in order to seek learning opportunities.

A second conclusion that is highlighted in this study is that SIEs made use of ad hoc strategies in order to make sense of experiential learning challenges. Most Western SIEs in the current study did not have a previous working experience within the GCC countries or in general within countries with collectivist cultures. Hence, their reliance on past experiences from different cultural contexts which led to discrepant situations. As described by Louis (1980b, p.338):

> When surprises occur, transitioners most likely attach meanings to them using interpretation schemes developed in previous roles and settings, resulting in inappropriate or dysfunctional interpretations. Interpretational errors, in turn, lead to inappropriate behavioral and attitudinal responses.

Such reliance on ad hoc strategies and being responsible for their own learning made sense as SIEs in contrast to CEs did not have the advantage of being supported by a multinational organisation at home and the subsidiary in host countries (Collings et al., 2011). But paradoxically, ad hoc learning was referred to in the literature (Mumford, 1996; McCall and Hollenbeck, 2002) with regards to CEs due to the failure of many organisations to provide cultural training to its global leaders (Mendenhall et al., 1987; Cerimagic, 2011).

The findings in this study illustrate that in this case SIEs made use of various sensemaking ad hoc strategies in order to switch "from reliance on old and inappropriate habits of mind to active thinking" (Louis and Sutton, 1991, p. 69). Such active thinking took place in the back region (Goffman, 1959). One such strategy was the use of a local "cultural mentor" at work as in the case of interviewee 15 the Irish SIE working in a Saudi bank. He used to attend meetings with the local business relationship manager in order to seek advice on any "subtleties" he could not make sense of during a meeting due to the different cultural context. This relationship between interviewee 15 (the newcomer) and the local relationship manager (the insider) had as a purpose to “facilitate the newcomer’s acquisition of the context-specific meaning dictionary or interpretation scheme” (Louis, 1980a, p. 243).

In other cases, a SIE would seek advice from a local peer or a compatriot from their own network to discuss a specific challenging situation he/she had to confront. For example, interviewee 7 an Irish SIE working in a Saudi bank had a challenging situation with a local employee that was disengaged in his role. This situation frustrated interviewee 7 as he mentioned “I was applying my old logic to the situation from my old role”. He used the automatic mode in his previous Irish context to deal with the situation instead “moving away” or “unfreeze” from the old situation as a first step in accomplishing change (Louis, 1980a). Hence, he decided to discuss this critical incident with a Saudi colleague who advised him to let go. In this situation the SIE as a newcomer to the GCC countries sought for advice in order to make sense of the new cultural setting. That is the case as “the insider usually has sufficient history in the setting to interpret them more accurately or to make sense based on relevant knowledge of the immediate situation” (Louis 1980a p.242). Similar conclusions about “collaborative learning” via peers, mentors and networks in order to seek feedback have been identified in the literature via mentoring, peers and networks (Bozionelos, 2009; Bierema, 1996; Spreitzer, 1997; Eichinger and Lombardo, 2004). But although such formal and informal mentoring programs were suggested for SIEs nurses in Bozionelos (2009) study in the KSA, my research’s findings confirmed that still the majority of companies do not offer such support. Hence, SIEs have to rely on themselves in seeking such support as a learning tool.

Another strategy to make sense of the new cultural setting in the GCC countries was the use of observation and listening to decipher the explicit and implicit communication of locals, other foreign colleagues or clients regarding ambiguous areas of gestures, vocal tones, actions or not directly expressed views. That was the cases discussed in the previous chapter of interviewee 19 a Lebanese SIE working in Qatar regarding his observation about the implicit communication of his Indian client and interviewee 29, an American SIE working in KSA regarding his observation about small innuendos that locals comply with. Such observations were used by the SIEs as a strategy to make sense of the new cultural setting and acquire cultural knowledge in order to “learn the ropes, as socialization is frequently termed by those going through it” (Louis, 1980a, p. 230). Moreover, interviewee 22, an Irish SIE with more than 20 years working experience in the KSA emphasised the importance of listening to make sense of what is said “The more you listen the more you learn…when you’re dealing with people in the Arab world, particularly Saudis, they say one thing and mean another. So, I ask myself the question, ‘what does he really mean?’ That is a skill you need to learn… You’ve got to listen intensely”. The ad hoc strategies of observation and listening illustrated in my findings are in alignment with the literature (Bierema, 1996) who identified such ad hoc strategies as “experiential learning”. In addition, cognitive learning through reflection as a retrospective approach was part of the findings of this study as disclosed by interviewees when discussing the mild and severe challenges they confronted and how they made sense of these critical incidents. Reflection via retrospection used by global leaders have been drawn in the literature (Mumford, 1996; Bierema, 1996). Moreover, one ad hoc strategy to learn mentioned in the literature but not confirmed in my study was the use of self-directed learning (Bierema, 1996) by SIEs as all used learning strategies were ad hoc.

It is noteworthy that the majority of these studies were conducted on a domestic level in the USA (Bierema, 1996; Eichinger and Lombardo, 2004; McCall et al., 1988) and in the UK (Mumford, 1996). Thus, the contrast between what was learned by the SIEs ad hoc strategies in the context of the GCC countries and the executives domestically in aforementioned studies. This conclusion is in agreement with cross cultural management literature as according to Morrison (2000, p.119) “global leadership is quite different from domestic leadership. What works in China does not always work in Canada or India. An important reason why global leadership is different is the role culture plays on norms and values”. In addition, an international assignment has a “higher order of complexity, challenge and learning“ (McCall and Hollenbeck, 2002, p.36). Hence, the contribution of this study to the literature of global leadership development and SIE in illustrating these ad hoc strategies as part of the learning cycle of leadership development within one of many unique cultural contexts which is the GCC countries.

Sensemaking ad hoc strategies enabled SIEs to sense the conditions to switch from automatic mode to conscious cognitive mode as exhibited in figure 6.1. Hence, “errors can be reduced by improving one’s capacity to ‘read the situation’, so that future inappropriate reliance on automatic modes might be prevented” (Louis and Sutton 1991, p.64). The following section highlights how SIEs depending on their cultural background learned their lessons from challenging experiences within the distinct cultural context of the GCC countries.

#### 6.5.1.2 Cross-Cultural Lessons Learned

One conclusion of the findings in my study is that SIEs used active thinking retrospectively to interpret the critical incidents they went through according to the local cultural context and sum up the lessons learned in order to switch from an automatic mode they used back home to a conscious cognitive mode within the new context of the GCC countries. In doing so they used “sensebreaking” which is defined by Pratt (2000) the destruction or breaking down of meaning. The usefulness of a construct such as “sensebreaking” within cultural sensemaking is to “motivate people to re-consider the sense that they have already made, to question their underlying assumptions, and to re-examine their course of action” as described by Lawrence and Maitlis 2014 (cited in Maitlis and Christianson 2014, p.69)

So, for example, in the case of interviewee 29 discussed earlier he used the strategy of listening carefully to the complaints of his Arab colleagues to make sense of their embarrassment to his straightforward remarks about their performance in front of other colleagues. Hence, through using the sensebreaking activity he learned that his “American behaviour” of being direct in his criticism although suitable back home was out of context in the KSA. Hence, such behaviour was as he was quoted as describing it as a “hindrance” in order to have good and smooth relationship with his Arab colleagues. As a result, he decided to “rectify” (his words) his behaviour by switching to a “conscious cognitive mode” (Louis and Sutton 1991) as displayed in figure 6.1.

In this case that meant having a private conversation with his Arab colleagues when he had to give them negative feedback about their performance. Hence, in this third stage of experiential learning interviewee 29 learned that he had to "switch to conscious cognitive mode" (Louis and Sutton 1991) which was the appropriate new behaviour within the new cultural context od KSA.

The sensebreaking activity was utilised by SIEs as a learning tool by thinking actively about their cultural approach within their old roles back home in contrast to the required new cultural approach for a novel situation within a new context. Moreover, sensebreaking activity was employed by SIEs to break down their own old cultural approach meanings and switch their behaviour to a conscious cognitive mode that was adequate for the GCC countries context. In addition, sensebreaking was also used in breaking down their local and foreign colleagues' old organizational meanings within a new context of change management as shown in the case of interviewee 13 in implementing a new evaluation system based on performance not seniority. Sensebreaking in this event "is practical when organisations need to reestablish the commitment of their members to a new strategy" (Mantere et al., 2012, p.8). Sensebreaking has been described as the prelude for sensegiving, in which leaders or companies fill the meaning vacuum constructed through sensebreaking with new meaning" (Pratt, 2000). Via the use of sensegiving SIEs displayed through a conscious mode (Louis and Sutton, 1991) their global leadership skills that they developed within the new context of the GCC countries.

Conversely, McCall and Hollenbeck (2002) in their empirical study interviewed global executives working in 15 global organisations within three continents in 34 cities. In their findings McCall and Hollenbeck, 2002, p.200) emphasised that "culture shock is the unique global experience" and "lessons of culture are the unique global lessons". Moreover, they generated a list of general lessons learned from international experience. For instance, learning to deal with cultural issues and different cultures, learning to lead and manage others, learning to run a business and learning to deal with problematic relationship. But this list is generic and lack a distinct categorisation of the distinctive lessons learned depending on the collectivist or individualist cultural context of the said location. But all aforementioned learnings are variables depending on the specifics of each cultural context. Moreover, cultural shocks and lessons of culture are unique not universal, hence, the need for distinct categories of cultural lessons learned within a specific cultural context depending on the cultural background of the expatriate managers (SIEs/CEs).

Two more empirical studies within the literature had similar characteristics of subjects. Namely, Yeung and Ready (1995) study that surveyed 1,213 executives working in 10 global corporations in eight countries. These leaders were asked based on their nationality to select the five most important leadership capabilities out of a list including 45 leadership competencies. Interestingly the results uncovered considerable differences in the domestic emphasis on crucial leadership competencies (Morrison, 2000). Hence, these results can predict the struggle of these executives when working abroad as they will be exposed to dissimilar leadership skills from the ones used domestically. In contrast, my research put emphasis on the empirical learning of global leadership competencies within a unique cultural context for SIEs from dissimilar cultural background. Such contribution will have practical implications in facilitating the training and development cross culturally of expatriates in the GCC countries by organisations and in a self-directed way by SIEs.

As for the empirical research by Caligiuri and Tarique (2012), they have surveyed 420 global leaders from 41 countries and working in three large MNEs. These global leaders were surveyed on dynamic cross-cultural skills, personality characteristics, demographics and global leadership developmental experiences. One limitation of this study was that the majority of the surveyed global leaders were Americans (64 per cent). Moreover, as with aforementioned two studies (McCall and Hollenbeck, 2002; Yeung and Ready, 1995) the focus was on using CE subjects working in MNEs all over the world. Consequently, and in contrast to my research the learning lessons of global leadership drawn in these studies were generic with no practical implications within a specific cultural context. All in all, cultural context matters in order to enhance the transfer of lessons learned from an international assignment. Consequently, my thesis findings are in agreement with Wilson and Yip (2010, p.54) quoted that:

> Managers need concrete insights about what they need to learn to succeed in their business environment. Without situation specific knowledge, they will not know what lessons to extract from their experiences, and this will stymie their efforts at self-development. Similarly, those responsible for leader development need a working knowledge of possible variations concerning what leadership learning will be most useful in a particular context.

One more conclusion from my research findings is that SIEs learned different things from the same kinds of experience. That was the case with the Irish interviewee 22 working in KSA as a sales manager and the Egyptian interviewee 17 working as a general manager of a travel agency in Kuwait when both had to take a decision to make redundant a large number of employees due to a decline in profits. For the Irish SIE "that was unfortunate. But it had to be done…as people didn't have the skill set to do the job". His learning curve was that have he had the time he "would have put in place a training programme, to see if people would respond to training". As for the Egyptian SIE, he was ordered by his British manager to sack these employees which he did, although he considered such decision as "not ethical". His learning curve was that "you should not be so emotional in the managerial position. You should not let people see your emotions". This conclusion is consistent with the literature (McCall, 2010; Wilson and Yip, 2010), but in my findings such different learning from same experience is due to the different cultural background of the Irish (individualist) and the Egyptian (collectivist) SIEs.

Another conclusion with regards to the empirical learning of SIEs in the GCC counties is that SIEs who had the opportunity to work in a local firm admitted of having learned more about the domestic culture. The Irish interviewee 22 acknowledged that working in local company in the KSA was *"a richer experience*" as he was able to *"embrace the Arab culture*". Furthermore, he thought he adapted better to the culture by working for a local company. This finding might explain the literature results that SIEs are better than CE in terms of general and interaction adjustment (Froese, 2012; Peltokorpi, 2008; Peltokorpi and Froese, 2009; Froese and Peltokorpi, 2013) as many often they work for local organisations in contrast to CEs who usually work for MNEs.

An additional conclusion from my study's findings is that SIEs with longer international experience within the GCC countries either in same country or several countries of the region navigated easier the cultural challenges they were confronted with. There is evidence in the literature that global leaders do develop GLC mainly during challenging IAs (McCall, 2010; McCall and Hollenbeck, 2002; Ng et al., 2009; Dragoni et al., 2014; DeRue and Wellman, 2009; Dragoni et al., 2011). But from my research it is evident that such learned lessons of global leadership are useful and transferable only when such experience is accumulated within nations with cultural overlap as in the case of GCC countries. The next section discusses the SIEs' display of global leadership competencies via sensegiving, which is also my secondary research question.

#### 6.5.1.3 Displayed Leadership Skills

Several taxonomies of global leadership skills have been developed the last three decades (Rhinesmith, 1993; Yeung and Ready, 1995; Brake, 1997; Spreitzer et al., 1997; Balck et al., 1999; Rosen et al., 2000; McCall and Hollenbeck, 2002; Bird and Osland, 2004; Bird et al., 2010). The taxonomy used in this research was the one compiled by Mendenhall et al. (2017) as a major review of global leadership competencies in order to organise the field. This taxonomy was fit for the purpose for my research as it included all basic global leadership skills (Managing self and managing people and relationships) that might be displayed within any cultural context. Moreover, the four global leadership competencies that emerged from the data were cross-cultural communications skills, empowering others via mentoring skills, create and build trust skills and flexibility skills.

One conclusion of my empirical study findings is that some global leadership skills (i.e cross-cultural communications skills, building trust, flexibility skills and mentoring skills) would be displayed in a rather dissimilar way within an individualist or collectivist cultural/national contexts. For instance, SIEs communications competencies needed to be learned and adjusted to the host countries verbal messages (words) and nonverbal messages (tone of voice, facial expression, behaviour, physical setting, etc). Interviewee 29, an American SIE in the KSA acknowledged that *"people in this part of the world* *communicate a lot through body language"*. Collectivist cultures as in the case of the GCC countries are considered a high context communication culture. Such cultures were described by Hall and Hall (2000, p.25) as "one is which little has to be said or written because most of the information is either in the physical environment or supposed to be known by the persons involved". But as the majority of the interviewees in my study were Westerners from individualistic cultures, hence, their way of communication would belong to the low context dimension. Such dimension was defined by Hall and Hall (2000, p.25) as "one in which the mass of information is vested in the explicit code".

For example, in the case of SIE 13 discussed in the findings, he learned from the sensebreaking (Pratt, 2000) activity that he needed to change the way he communicated with his Saudi colleagues in order to suit the Saudi context if he was to bring change management in the bank. The use of sensegiving in this event meant that interviewee 13 had to display cross-cultural communications skills as a leader to influence his fellow workers about the necessity to have a performance evaluation. As he revealed "You really do have to hone and change and flex and stretch your style to suit the style of the people you work with". Such a statement is a proof that he acted from that moment in a "conscious mode" (Louis and Sutton, 1991) by giving sense to his Saudi colleagues about the new change management in the bank by adapting his communication skills to the new cultural context as demonstrated in figure 6.1.

As for creating and building trust competencies, in the case of collectivist cultures such as in the GCC countries in-group members would be more trusted than out-group members (Bird and Osland, 2005). As a matter of fact, trustworthiness and loyalty are the main qualifications for group-oriented directors hiring new employees (Adler, 2007). In addition, in a survey regarding Arab executives, two thirds of the said executives considered employees loyalty as more crucial than effectiveness (Ibid). That is the case as such societies are relationship cultures in contrast to rule-based cultures (Hooker, 2012) such as the individualist cultures where trust is gained by performing well in your job. Consequently, people from collectivist cultures would be cautious and need more time to develop trust with out-group members, whereas people from individualist cultures would trust strangers until they prove themselves unreliable (Bird and Osland, 2005). My research findings show that SIEs learned how creating and building trust with their Arab and other foreign colleagues, bosses and clients was vital in order to manage people and business successfully. The findings showed that SIEs learned to earn such trust at work through empowering their employees via sharing with them their knowledge and expertise on the job and push for a salary raise regarding salary discriminated foreign employees. As quoted by interviewee 29 "Establishing trust and proving to the team members that the manager is on their side, and they can trust him or her…Trust is as extremely important".

With regards to empowering others via mentoring and coaching competencies, from the literature it is evident that the level of the education systems with the GCC countries are underfunded and underdeveloped (Forstenlechner and Rutledge, 2011). Hence, the inadequacy of the locals' level of skills for the existing job positions. As economies in the GCC countries grew there was a need to attract foreign skilled labour from the USA, UK, Australia and Europe in order to provide management competencies and technical expertise (Waxin and Bateman, 2016). Moreover, with the saturation of public sector job positions preferred by locals due to high wages and less working hours (Forstenlechner and Baruch, 2013) the level of locals' unemployment rose. As a result, all GCC countries implemented few years ago workforce localisation programs via quota systems to bring in more local staff in both public and private sectors. Hence, the vitality to learn such skill by SIEs in their role as illustrated in the findings in order to transfer know how to locals. As the majority of the SIEs in my study were over the age of 40, they had substantial working experience and expertise in their fields and were recruited for this reason. Moreover, all SIEs working in the banking and healthcare sectors acknowledged that part of their duties was to coach and mentor local colleagues. As Interviewee 3, an Irish SIE working for a Saudi Bank, with 30 years of experience in the banking sector back in Ireland, asserted: *"one of the important requirements is to transfer knowledge to locals, leadership here is more than just giving direction and pointing the way. It requires more "hands on" support. Coaching and mentoring are essential skills"*.

As highlighted in the research findings being flexible in general as a Western SIE within collectivist cultures such as the GCC countries was vital. That was the case due to the stark differences between the characteristics of collectivist cultures, that is high context cultures in communication, relationship-based in contrast with individualist cultures characteristics of low context communication, rule based. Moreover, both collectivist and individualist cultures have their own time and space systems (Hall, 1989). Hence, the need to be flexible when confronted with ambiguous situations due to the contrasting values of SIEs individualist cultures and the GCC countries collectivist cultures. The following quote from Interviewee 4, a British SIE working in a Qatari hospital illustrates the required tolerance of ambiguity and vitality of the flexibility competency in such context *"it teaches me that I have to be very accepting of what's going to happen and not be rigid in my own idea of what should happen*".

In the case of interviewee 29 discussed earlier, he learned from breaking the meaning of his out of context behaviour of embarrassing an Arab colleague by discussing his flaws publicly. Hence, the last stage in his experiential learning cycle was to consciously behave according to the new learned mode by discussing the colleague's weaknesses privately. Being in such "conscious mode" (Louis and Sutton, 1991) was confirmed by interviewee 29 when he was quoted *"Now it's actually very comfortable for me to identify an issue and address it"*. Sensegiving activity in this case was about the display of empathy as an element of emotional intelligence towards an Arab colleague and being culturally sensitive by giving him feedback in private. Having such a private conversation with the Arab colleague yielded positive results as the SIE mentioned *"And it actually helps me now because if I do it alone with that person, that person is willing to listen more and offer much more interactive feedback. So, it works out well".* The positive results in using sensegiving by SIE 29 is a proof that such an activity is not just a top-down procedure as argued by Sonenshein (2010 cited in Maitlis and Christianson 2014, p. 67) as "those receiving sensegiving have their own interpretation and can actively resist efforts from leaders to influence the strategic change". Hence, showing empathy and adjusting his communication skills as a leader by the SIE 29 in this case meant that an Arab colleague would actively listen to his manager's remarks which would have a positive impact on leading successfully Arab employees with different cultural background within the German multinational subsidiary in the KSA.

A second conclusion that is derived from the previous one as an answer to Mendenhall et al's (2017) question if inquisitiveness could be considered the most important global leadership skill is the following, being curious as well as being non-judgemental along with other competencies should be considered as fundamental global leadership skills necessary for any SIE or CE in any cultural context in order to navigate other global leadership skills that are cultural context specific. Based on that premise, in the literature review, the researchers McCall and Hollenbeck (2002) outlined in their empirical study a set of competencies for global executives that they state are comparable to other such set of skills in the literature (i.e. being open-minded, cultural interest, being resilient, dealing with complexity). Moreover, McCall and Hollenbeck (2002, p. 34) claim that "no one agrees on a global competency set, because there is no universal global job...These competencies are what enable people to live and work in other cultures". I agree with these scholars that a global leader should be equipped with basic leadership skills that are a prerequisite when leading locally or globally like for example being honest, open minded, resilient or optimistic. But depending on the cultural, political, social and economic landscape of the host country, a global leader (SIE/CE) has to develop and display the distinct leadership competencies required in that specific cultural and business context in order to be an effective leader. What was evident with regards to inquisitiveness composite in this study was that all SIEs displayed the dimension learning from mistakes skill. The findings of this study reveal that SIEs also need to develop and exhibit global leadership skills that would converge with the culture and business context of the host country. In my study the majority of the interviewed SIEs were Westerners from developed countries with an individualist cultural background. Hence, the need as shown in the findings to master global leadership skills that are considered compatible within a collectivist culture and business context such as the GCC countries. In the next section the empirical study contribution is discussed.

### 6.5.2 Empirical Study Contribution

This research findings supported the literature review acknowledging that different cultural contexts require different global leadership skills as such competencies cannot be considered universal and be applied in all cultural backgrounds. Hence, my findings are in agreement with Cumberland et al. (2016 cited in Mendenhall et al., 2017, p.344) quoting that "one of the gaps in the literature we found is the need for a more coherent understanding of what global leadership competencies are needed in different contexts".

With reference to developed contribution, this study has developed further the ad hoc strategies used by SIEs to learn new global leadership skills within the context of the GCC countries. Ad hoc strategies to learn from experience was researched in the literature review but in many cases on a domestic level within the USA and UK (Bierema, 1996; Eichinger and Lombardo, 2004; McCall et al., 1988; Mumford, 1996). Hence, the different learning outcome as discussed earlier between local and international level. Moreover, in one study such research was confined to SIE women's ad hoc strategies to learning from experience within the UAE (Stalker and Mavin, 2011).

A novel contribution from the empirical insights of my study is the four stages of experiential learning that SIEs managers had to go through in order to develop and display global leadership competencies. Within these four stages sensemaking, sensebreaking and sensegiving activities were utilised by SIEs in the process of developing such skills. As a matter of fact, sensemaking and sensegiving are described by many scholars according to Weick (1995 cited in Humphreys et al 2011, p.42) as "key elements of leadership process". Moreover, sensegiving and sensebreaking were also reported by Mantere et al. (2012) as activities performed by leaders and managers. According to my knowledge no other empirical study did present a detailed process of how experiential learning is achieved during international assignments.

Another key contribution of this research with regards to my secondary question is the identification of distinct global leadership skills appropriate for the cultural and business context of the GCC countries in contrast to McCall and Hollenbeck's (2002) identification of a general list of competencies for global executives that do not take into consideration the cultural background of the subjects and the cultural context of the host countries. Such shortcoming by the Western scholars can be explained as the majority of companies' theories have been introduced by American scholars (Adler and Gundersen, 2007). Moreover, some scholars do posit that American perspectives of leadership do apply on a global level (ibid). On the contrary, research on leadership has revealed that the idiosyncrasy of the USA in a number of matters between Western and other cultures studied, hence the belief of many leaders that leadership is culturally contingent (Ibid).

In the next section the methodology approach of this thesis and contribution is discussed.

### 6.5.3 Methodological Approaches

Data collection was performed via semi structured critical incident interviews adopting a phenomenological approach. The usefulness of such perspective is to prioritise the subjects' reflections over the classification of incidents by staying as close as possible to the SIEs lived learning experiences. Hence, the agreement of my findings with the literature (Cope and Watts, 2000; Snell, 1992; McCauley, 1986) that although most critical incidents were of negative nature, the outcomes were positive from a developmental point of view according to SIEs. As described by McCauley (1986 cited in Snell 1992, p. 136) "By looking only at the stressful nature of these events, we overlook the potential learning involved when a manager is forced to face a difficult situation and his or her own weaknesses". For example, interviewee 29, an American SIE working as a manager in a German MNC in the KSA, recognised his ignorance about the cultural norm of "sugar coating" when giving feedback to an employee, which would not be the case back in the USA. Hence, he apologised when he realised his mistake as he acknowledged that he should respect the cultural norm.

In contrast, McCall and Hollenbeck (2002) used in their study a variety of analyses including simple counts, percentages, cross tabulations and multidimensional scaling. Moreover, they acknowledged that "whenever we strayed too far from the stories of our executives, the lessons of the research were lost – data failed to capture the reality" (McCall and Hollenbeck, 2002, p.224). Instead, they focused on producing a classification of 332 key events and 952 lessons. As a result, such generic categorisation of events and lessons fails to capture the unique cultural challenges and lessons learned within a specific cultural context. Moreover, whereas both researchers stated that "data failed to capture the reality", my thesis methodological approach illustrated the learning and developmental impact of SIEs subjective interpretations a valuable and pertinent research data.

#### 6.5.3.1 Methodological Approaches Contribution

In support of the literature review (Stern et al., 1998; Chell, 1998; Cope and Watts, 2000), this study has found support in the value of combining the critical incident interviews with a phenomenological approach as a research strategy as it suited my semi structured interview questions in order to elicit from the subjects' rich data on their learning experience from specific critical incidents either mild or severe repercussions wise.

In terms of developed contribution, this thesis adopted the aforementioned research methodology within the literature fields of global leadership development and self-initiated expatriation in order to capture SIEs perspective on their learning process within the unique cultural context of the GCC countries. The findings from SIEs reflections from the interviews data showed their lack of knowledge regarding the cultural context specifics of the GCC countries. As a consequence, their failure to grasp how they should have behaved accordingly, and the lessons learned. In conclusion, the critical incidents were used as learning events to extract in retrospect from SIEs the learning cycle they went through to learn global leadership skills.

In the next section practical implications are presented.

### 6.5.4 Practical Implications

The findings of this dissertation may be a valuable source of reference for individual SIEs, employers and more specifically HRD professionals within organisations in the GCC countries. These are now considered in turn - first from an organisational perspective and second from an individual perspective.

#### 6.5.4.1 Implications for Organisations

The findings of my study have various practical implications for HRD professionals in local companies and MNEs in the GCC countries. The first implication is related to providing different training programmes for SIEs from developed countries and SIEs from developing nations. That is the case as this research findings showed that Western SIEs with individualist cultural background had a lack of knowledge on the collectivist cultural context, business context and etiquette in the GCC countries. Moreover, such training programmes should include the unique cultural preferences for leadership style that can be adopted in the GCC countries as for example ideal paternalistic practices.

A second implication is the potential suitability of SIEs to hold managerial positions within local organisations, MNCs, SMEs and joint ventures in contrast to claims in other studies' findings (Tharenou, 2013; Makkonen, 2016). There are several reasons from the findings as to why SIEs would be suitable to replace local or CE managers. In contrast to local managers, SIEs would be more competent for such positions than locals due to higher level of qualifications and working experience. Moreover, locals do prefer to work in the public sector as they are paid better and work less hours. In addition, in some countries as Qatar and the UAE locals are a minority, hence there is a shortage to cover such positions by local employees.

In comparison with CEs, as demonstrated in the findings, SIEs were working for several years for the same employers, thus they proved to be loyal employees, contrary to the research literature. Furthermore, they are highly motivated as they have chosen the GCC countries as the context of their international assignment. In addition, they were highly educated and by working many often for local organisations, they had the local knowledge and leadership skills for such managerial roles. In addition, SIEs were proven from the findings to be good mentors in transferring knowledge to other local and foreign employees. All in all, SIEs can be a suitable alternative to locals and CEs for managerial roles within the context of the GCC countries for MNCs. Hence, foreign and local organisations and HR practitioners should tap in such a large talented pool of employees to fill in managerial roles.

A further implication refers to the vitality to have a local mentor to support new SIEs as suggested in the research literature (Bozionelos, 2009). As mentioned by many SIEs in this study they are living “in a bubble” as in most cases they are sharing a compound with compatriots. Hence, the lack of contact and socialisation with locals. The findings in my study illustrated that such assistance was provided by few organisations which had positive effects in the faster adjustment of SIEs in their managerial positions. Such support is even more crucial in the case SIEs are recruited from their home countries and did not have any cross-cultural training prior to their travel to the GCC countries to start their assignment. The role of such local mentor should encompass information about the culture of the country and the organisation. Moreover, the mentor should give advice with various challenges encountered by the SIEs.

Another implication concerns the importance for HRD professionals to be aware of SIEs financial benefits requirements in order to attract SIEs from abroad and to consider the overall spending levels for the organisation. Such financial requirements were highlighted in my study as a primary motivation for SIEs in order to accept an IA in the GCC countries. Such motive made sense in choosing the GCC countries for an international assignment as expats would earn higher salaries tax free and have several allowances than anywhere else in the world (HSBC Global Report, 2015). Moreover, contrary to many research literature (Makkonen, 2016; Tharenou, 2013; Howe-Walsh and Schyns, 2010) a novel finding in my research illustrated that all interviewed SIEs were not based in the GCC countries when recruited but where interviewed and accepted the assignment while still at home. As a consequence, they were offered tax free salaries and allowances similar to CEs. Hence, SIEs should not be considered as a cost-effective solution in comparison to CEs.

The importance for organisations to have in place HRM policies and practices to support SIEs managers the first few weeks after landing in the GCC countries is an additional source of implications. The findings revealed that few companies were well enough organised to provide such assistance which will allow a SIE manager to have a faster adjustment and focus on performing well at work. Many SIEs complained about the lack of support to find a suitable accommodation and facing bureaucracy to get a driving license.

One more implication arises from the significance to assess SIEs' suitability during the selection and recruitment phase by taking into consideration soft skills criteria beside technical skills. The GCC countries are a challenging context for expatriates (Brookfield, 2016). Moreover, 80 percent of organisations do not formally assess the level of adaptability of candidates before sending them on an international assignment and only 29 percent of organisations are using a type of self-assessment tool (Brookfield, 2016). Hence, a risk of higher rate of international assignments failure. From my research findings it was evident that SIEs were recruited from abroad due to their expertise and knowledge within their field. Moreover, the findings showed a lack of basic global leadership skills in few SIEs as for example, being non-judgemental about local customs and traditions in GCC countries and being humble about their knowledge of Islamic societies. Hence, the need as discussed with some SIEs for a soft skills assessment including global leadership competencies. A good example to mitigate such risks in order to choose the right SIE was provided in my study by few SIEs working for the same Saudi employer. The Saudi bank invited the successfully interviewed SIEs candidates to a fully paid travel to Saudi Arabia in order to spend a week in the country, meet their new colleague and learn more about the organisation and the KSA culture in order to decide if they will proceed and accept the job position.

A further implication has to do with the lack of training and development for SIEs from mainly local organisations as such training was offered only by MNEs as illustrated in the findings. In local organisations training and development is only offered to locals, whereas SIEs are hired for their expertise, hence they are not offered any training and development. As quoted by interviewee 18 he was told by a Saudi HR manager "you don't water a full-grown plant, even if it is a potted plant". Such feedback was mentioned by other SIEs as well and identified in research literature (Stalker and Mavin, 2011). Hence, local companies should follow MNEs example in offering training and development to SIEs managers including cross-cultural training. Such decision would be ethical and would be a unique selling point for SIEs to join such companies.

Another implication regards the focus of HRD professionals in local companies on local employees' issues. As disclosed by interviewee 18 "HR takes care of the locals and then everyone else is left betwixt." My research findings are in agreement with research literature (Waxin and Bateman, 2016). Thus, local organisations need to include the management of expatriates within its priorities as well as diversity management issues due to the large foreign and ethnically diverse workforce in the GCC countries.

One more implication is linked to the localisation of the workforce policies within the GCC countries and promoting locals in managerial positions in relation to the clear goals that need to be set for foreign workforce job positions including SIEs managers. Moreover, it was illustrated in the research findings in few occasions the problematic relationship between local employees and SIEs. Such problematic relationships might stem as suggested from research literature from the feeling of locals as a minority in their country and lack of opportunities to be appointed in managerial positions due to competition from SIEs. Therefore, there is a need to have clear policies in place to manage such dual labour markets.

One last implication concern closing the gender pay gap but also the pay gap between SIEs with same experience and qualifications from developed and developing countries. The findings of my research showed that SIEs from developing countries were paid less than SIEs from developed countries. Such salary discrepancies are dealt with lately in the GCC countries by implementing new laws to prevent such disparities as is the case in the UAE (Arabianbusiness.com, 2018). Equality in pay should be the norm if organisations in the GCC countries will be competing to attract top talents from abroad. I will discuss in the next section the practical implications with regards to SIEs.

#### 6.5.4.2 Implications for Individual SIEs

One implication for non-Muslim SIEs on IAs in the GCC countries would be the value of having some basic understanding of the religion of Islam as all local traditions and even business etiquette are heavily influenced in the GCC countries by the Islamic culture. From the study findings it was evident that most SIEs lacked basic knowledge about Islam. Such lack of understanding from SIEs was the reason underlying many of the challenging situations and cultural shocks highlighted by interviewees.  Linked to Islam and the Koran, the holly book for Muslims is the Arabic language. Although English is the lingua franca within the region. From my study findings it was revealed that just few SIEs had the intention or started learning Arabic. Although difficult to learn, SIEs would gain several advantages from learning Arabic. Namely, adjusting faster within the region as learning the local language would enable a SIE to decipher the local culture. Moreover, it would ease the SIE's communication with local staff which would lead to more genuine and better relationships with them, thus a more effective management of local staff. In addition, such language skill can enhance an SIE's employability as in some positions related to training and development of locals there is a need for bilingual English and Arabic speaker SIEs.

A further implication involves the proactiveness that Western SIEs in particular will have to show in managing their leadership skills portfolio that are unique to collectivist cultures in a self-directed way via reading, seminars and socialising with locals. That is the case as it was evident from the study findings and research literature (Stalker and Mavin, 2011) that training and development was not offered to SIEs by local companies in GCC countries. Such proactive attitude coupled with the lived international experience will yield positive results as emphasised by DeRue and Myers (2014 cited in Mendenhall et al., 2017, p.311) quoted that “lived experiences that are novel, of high significance to the organisation, and require people to manage change with diverse groups of people and across organizational boundaries are important sources of leadership development”.

In addition, SIEs will need to be selective when choosing employers within the GCC countries that would offer such training and development and support through a local colleague acting as a mentor.

One last implication concerns SIEs’ job applications within the GCC countries. It was evident from the study findings that few recruitment agencies were providing professional services to SIE candidates. As for example, preparing the SIE candidate before travelling for the international assignment by providing cross-cultural training about the country and the organisation and even meet with the SIE once he/she is in the host country to check that all is well during the adjustment period. Such services are offered by an organisation to a CE but not to a SIE. Hence, a SIE need to be selective in choosing an adequate recruitment agency that would provide such services within the GCC countries as was the case with few subjects in this study.

### 6.5.5 Knowledge of Practice Contribution

This thesis findings supported the literature review (Stalker and Mavin, 2011) with regards to the lack of any training and development for SIEs in locally owned organisations in contrast to MNCs. Interviewee 23, an Egyptian SIE working as a manager in a Qatari bank was quoted the following regarding the reason of lack of training and development for SIEs: *"You are not in need to do this training. You have almost more than 15/20 years of experience*". As for locals, they were offered extensive training opportunities because *"the majority are secondary school graduates".*

Few studies in the literature review discussed the value of peer support and mentoring for SIEs within the GCC countries (Bozionelos, 2009). Hence, this thesis developed contribution is illustrating the ad hoc strategies used by SIEs including per support and local mentors as collaborative learning in order to seek advice and learn from their mistakes and develop global leadership skills.

The current thesis' novel contribution to knowledge of practice is the confirmation that SIEs from dissimilar cultural background (individualist or collectivist) need different cross-cultural training. The findings of my research showed that Western SIEs with individualist cultural background need extensive cross-cultural training in comparison with SIEs from collectivist cultural background. The reason being that the latter group of SIEs have cultural overlap with the collectivist culture of the GCC countries, which is not the case with Western SIEs.

## 6.6 Limitations of the Study

There are a number of limitations that this study must allude to and subsequently suggestions for future research are posed in an effort to address such limitations.

Although my study design was to target a sample of SIEs with a broad spectrum of cultural backgrounds, due to the use of snowball and convenience sampling strategies, my generated sample was unbalanced with regards to demographic characteristics as it included a large number of Western/Irish subjects. Hence, future studies may be replicated with a diverse sample from a broader spectrum of SIEs from developing countries and other parts of the world in order to increase the generalisability of the findings in terms of representativeness.

The homogeneity of the profile of SIEs in my study which might have led to selection biases in my sample as skilled SIEs targeted by employers in the GCC countries are selected based on their higher qualifications and seniority in their field of expertise. For example, the majority of the recruited SIEs were over 45 years old and had a high educational level (Master's degree). Moreover, all interviewed SIEs were already working in the region for at least 3 years. As a result of such similar characteristics, that could further influence how they learn and develop global leadership skills and the degree of cross-cultural adjustment. Hence, the need in future studies to include SIEs from younger age groups, more women and working in diverse sectors of the economy in order to address such limitation.

The conducted skype interviews had some limitations due to its virtual and artificial space and time. For example, it is challenging to build rapport during a skype interview (Cater, 2011) in contrast to a face to face interview. Moreover, some non- verbal data such as body language, tone of voice or gesture might not be observed in a skype interview which can affect negatively the richness of the qualitative data.

One last limitation in this study could be my role as an interviewer should not be considered as impartial as I am myself a SIE working in the UK within a healthcare recruitment agency, mainly responsible for recruiting SIE nurses and doctors from all over the world in order to work for NHS hospitals. Hence, the possible personal biases in my case as an interviewer.

## 6.7 Directions for Future Research

With regards to the recommendations for future research, an area of investigation in future studies might be the inclusion of more diverse sample by including more SIEs from developing countries and women as well as SIEs from various age groups and sectors. In addition, other categories of SIE can be included, such as SIE entrepreneurs and volunteers working for non-for-profit organisations.

A further area of consideration might be to replicate the study within a developed country having a sample of predominantly SIEs from developing countries in order to compare and contrast how SIEs from a collectivist culture would learn and develop global leadership skills within an individualist cultural context in comparison with the current study's findings. Moreover, such replication would allow to compare, and contrast developed global leadership competencies that might be distinct within a developed country in contrast to a developing country. The results of such studies would benefit SIE leaders when negotiating and partnering across cultural contexts by learning how to interact efficiently with various counterparts from dissimilar cross-cultural backgrounds (Gutierrez et al., 2012). Moreover, such research would add value to organisations in order to screen candidates for specific global leadership skills and for training purpose when preparing an expatriate manager for an international assignment in a specific cultural context.

An additional area of exploration could include a comparison of SIEs in various cultural contexts and/or contrasting SIEs from various cultural background in the same location (Doherty et al., 2013) in order to explore the effect of the cultural context on SIEs' working experience and the potential development of distinct global leadership skills in various cultural contexts.

One more area of investigation could include a future study about the employers and local employees' views on SIEs' contributions to the GCC countries' economies through their knowledge, expertise, skills and adjustment. Such future research can be also compared to CEs similar contributions to local economies.

A further area of inquiry could include a comparison between SIE and CE managers as to how they learn and develop global leadership skills during their IAs within the GCC countries. The results might be interesting as CEs' development of global leadership skills might differ from SIEs due to previous training and preparation back home and constant support during the assignments from home country organisation.

A last area of examination could include the reasons behind SIEs' repatriation. The majority of SIEs in my study were married but chose to embark on their international assignments as single status. But living and working away from their families was mentioned by few SIEs as a serious reason to decide to repatriate in the future.

## 6.8 Conclusion

This research provides the first in-depth empirical exploration of the impact of working experiences on SIEs in learning and developing GLC during their international assignments within the context of the GCC countries. The results of the study demonstrate that SIEs went through an ad hoc rather than a planned experiential learning cycle of four phases to learn and develop GLC. Moreover, it is evident from the data that Western SIEs confronted most of the critical incidents in comparison with non-Western SIEs due to the lack of cultural overlapping within the context of the GCC countries. Hence, they learned the lessons from their mistakes and developed the required GLC for the said cultural context. The findings of the study have important theoretical implications for the evolution of the conceptual framework of learning and developing GLC for expatriates (SIEs/CEs). In addition, there are practical implications for HRD professionals, particularly in the selection, recruitment and training of SIEs. As such, this thesis serves as a strong platform for further development of this scholarly field.

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# APPENDICES

## Appendix A: Correspondence to Potential Interviewees Requesting Participation

Dear _____

Thank you very much for your prompt reply. Please find attached the consent form and demographic document to fill in and send back to me. Moreover, please find attached the interview questions to read beforehand.

I would like to invite you to participate in my research study entitled: *The impact of self-initiated expatriation experience in developing global leadership competencies: a theoretical framework*. Your involvement in the study is completely voluntary and will take 40-60 minutes max through a Skype interview. Subjects must be self-initiated expatriates, which means that they have found this job position by themselves not through the support of their organisation at home as in the case of a corporate expatriate. They should be working within the Gulf region with at least one year of experience in a middle or senior managerial position within any industry.

All aspects of the study, including results, will be strictly confidential and only the researchers will have access to information on subjects. Neither the company nor any other organisation will have access to specific information you provide. A report of the study may be submitted for publication, but no individual subject or the company will be identifiable in such a report.

We expect that the research may benefit you in better understanding how your experience as an international assignee has benefited you in terms of the development of global leadership competencies. All subjects will receive a summary of the project's findings.

Please inform me if a Saturday or a Sunday suits you to have our Skype interview?

Thanks a million in advance.

Kind regards,

Nabil El Gazzar
DCU Business School
Office QG07, Dublin City University, Dublin 9.
Mail: el.nampil2@mail.dcu.ie / Tel: +353 1 7006875.

## Appendix B: Subject Informed Consent Form

I ……………………………………………………(PRINT NAME), give consent to my participation in the research project.

**TITLE: Developing global leadership skills within the context of the GCC countries.**

In giving my consent I acknowledge that:

1. The procedures required for the project and the time involved have been explained to me, and any questions I have about the project have been answered to my satisfaction.

2. I have read the Participant Information Statement and have been given the opportunity to discuss the information and my involvement in the project with the researcher.

3. I understand that I can withdraw from the study at any time, without affecting my relationship with the researcher or the Dublin City University now or in the future.

4. I understand that my involvement is strictly confidential and no information about me will be used in any way that reveals my identity.

5. I understand that being in this study is completely voluntary – I am not under any obligation to consent.

6. I understand that I can stop the interview at any time if I do not wish to continue, the audio recording will be erased, and the information provided will not be included in the study.

I consent to:

I) Audio-taping
II) Receiving feedback

If you answered YES to the “Receiving Feedback Question”, please provide your details i.e. (mailing address, email address).

<u>Feedback option:</u>
Address:
Email:
Signed:
Name:
Date:

## Appendix C: Demographic Information of Subject

1. Please indicate your gender: ------Male ------Female
2. Please state your age:
3. Please state your nationality:
4. Country of birth:
5. In which country are you currently living and working?
6. Occupation/Job level/Industry:
7. How many years have you been working in your organization?
8. Did you work abroad before?
9. What is your marital status?
10. What is the highest education level you have completed? Bachelor Master Other (please specify)
11. What is/are your native Language (s) spoken:
12. How many foreign languages do you speak? Which ones? What is your level of fluency?

# Appendix D: Interview Schedule

**Interviewee** _______

**Date & Time** _______

**A. Contextual Component:**

### 1. Questions concerning background as SIE

**a. Self-initiated international relocation:**

- Have you embarked on the expatriation entirely on your own, without the support of an organisation at home or previous host country? Did you have support from the new organization?

**b. Intentions of a temporary stay**

b1. Was it your original intention to repatriate to home country after a certain time? If yes, after how long time did you plan to go back home?
b2. Do you still plan to return to your home country in the coming months or years? If you have changed your mind why?

### 2. Question concerning previous assignments abroad:

Did you have any other international working experience abroad before your current one? How many assignments? Where?

### 3. Question for motivation to go abroad and motivation for developing global leadership skills:

- What were your motives to initiate your search and accept a job abroad? Have your objectives been met? Could you please elaborate on the following motive?

### 4. Question concerning technical skills to perform the job abroad:

- How your prior experience, knowledge and technical skills helped you in order to better adapt abroad and perform as a middle/senior manager in your role?
- How was your relocation itself and immersing in a new culture?

## B. Critical Incident Component:

### Three components of Critical Incident:

- What was the background situation that led up to the critical incident? (Antecedent information).
- What happened next? How did it happen? Why did it happen? How did you feel? (action).
- What was the outcome of the critical incident that you described? What led to the positive or negative outcome? What did you learn from this experience? What part of the experience would you consider learning? How have these experiences influenced or not influenced you as a manager in the decisions that you have made afterwards? (reaction).

In the following three questions, every subject will be asked to describe two (one positive and one negative) critical incidents in their workplace as managers or personal challenges with cultural or institutional underpinnings that represented key learning opportunities during their stay in the country.

### 5. Question concerning experiential learning theory for global leadership competencies:

- Could you describe a challenging experience (critical incident) positive or negative related to your role as a manager when you were hesitant/unsure of how it should have been handled from a cultural perspective?

### 6. Question concerning impression management theory (same process as with previous:

- Could you describe a challenging/critical situation (positive or negative) when you had to build rapport or cultural bridge of communication with employees, stakeholders or individuals from different nationalities while working in the GCC countries?

### 7. Question concerning sense-making theory:

- While working and living abroad you might have come across awkward situations, discussions or experiences you could not understand or make sense. Could you describe such an incident (positive or negative) that occurred to you while working in the GCC countries?
- Do you have any other comments about your experiences that you would like to share?
- Could you please suggest one or two participants with a similar profile to you?
- Can I keep in contact and come back to you for some clarifications?

## Appendix E: Categorical Analysis

| 1st Order Coding (Summary) | 2nd Order Coding (Categories) | Aggregate Dimensions (Themes) |
|---|---|---|
| • Culture Shock<br>• Culture bump<br>• SIEs Taken by surprise<br>• SIEs Taken aback | • Challenges due to diverse value orientations<br>• Triggered events<br>• Selecting inadequate script | Experiencing |
| • Use of sophisticated stereotyping<br>• Listening intensely<br>• Asking questions<br>• Seeking advice<br>• Observing | • Ad-hoc strategies for cultural sense making<br>• Framing the situation | Reflecting |
| • Translate SIEs experience into local flavor<br>• Rectifying personal behaviour<br>• Learning to work with everyone<br>• Learning from mistakes | • Learning local general concepts<br>• Translating complex intercultural information<br>• Make attributions and select a script | Thinking |
| • Coaching and mentoring employees<br>• Building trust<br>• Engage and build rapport<br>• Customise communications style<br>• Imbedding and adopting new behaviour | • Displaying global leadership skills | Acting |
| • Empathise and embrace Arab culture<br>• Acclimatise to change<br>• Aligning your expectations<br>• Listening, learning, building up relationships | • Coping and assimilating to the new culture | Adjusting |

## Appendix F: Profile of Each Subject

| Name | Title | Sector | Country of residence | In position since | Gender | Previous assignments Yes/No | Nationality |
|---|---|---|---|---|---|---|---|
| ***Interviewee 1*** | Executive Director Corporate Strategy | Healthcare | Qatar | 2012 | Male | Yes | British |
| ***Interviewee 2*** | Executive Director of Nursing | Healthcare | KSA | 2009-2015 | Female | No | Canadian |
| ***Interviewee 3*** | Advisor in Consumer protection | Banking/Financial services | KSA | 2013 | Male | Yes | Irish |
| ***Interviewee 4*** | Director of Health Information Management | Healthcare | Qatar | 2012 | Female | No | British |
| ***Interviewee 5*** | Project Manager | Banking/Financial services | KSA | 2013-2016 | Male | No | Irish |
| ***Interviewee 6*** | Manager | Consultancy | KSA | 2012 | Male | Yes | Greek |
| ***Interviewee 7*** | Policy Advisor | Banking/Financial services | KSA | 2015 | Male | No | Irish |
| ***Interviewee 8*** | Programme Director | Construction | KSA | 2014-2016 | Male | No | Irish |
| ***Interviewee 9*** | Regional Head/Corporate Banking | Banking/Financial services | KSA | 2011 | Male | Yes | Irish |

| Name | Title | Sector | Country of residence | In position since | Gender | Previous assignments Yes/No | Nationality |
|---|---|---|---|---|---|---|---|
| ***Interviewee 10*** | Senior Project Architect | Construction | KSA | 2013 | Male | Yes | British |
| ***Interviewee 11*** | Senior Manager/Human Capital | HR | UAE | 2009 | Female | Yes | British |
| ***Interviewee 12*** | Assistant Executive Director | Healthcare | Qatar | 2013 | Male | Yes | Irish |
| ***Interviewee 13*** | Project Manager/Advisor | Banking/Financial Services | KSA | 2015 | Male | Yes | Irish |
| ***Interviewee 14*** | General Manager | Utilities | UAE | 2005 | Male | Yes | Egyptian/Canadian |
| ***Interviewee 15*** | Business Architect | Banking/Financial Services | KSA | 2015 | Male | No | Irish |
| ***Interviewee 16*** | Design Manager | Construction | KSA | 2009 | Male | No | Irish |
| ***Interviewee 17*** | General Manager | Leisure Travel & Tourism | Kuwait | 2011 | Male | No | Egyptian |
| ***Interviewee 18*** | Head of Treasury | Banking/Financial Services | Qatar | 2014 | Male | Yes | American |
| ***Interviewee 19*** | Senior Consultant | Consultancy | Qatar | 2013 | Male | No | Lebanese |
| ***Interviewee 20*** | Associate Director | Construction | Bahrain | 2013 | Male | Yes | Irish |

| Name | Title | Sector | Country of residence | In position since | Gender | Previous assignments Yes/No | Nationality |
|---|---|---|---|---|---|---|---|
| ***Interviewee 21*** | Manager | Computer/Network security | UAE | 2012-2016 | Male | Yes | Canadian/Irish |
| ***Interviewee 22*** | Senior Marketing Advisor | Trade and Development | KSA | 2008 | Male | Yes | Irish |
| ***Interviewee 23*** | Area Manager | Banking/Financial Services | Qatar | 2012 | Male | Yes | Egyptian |
| ***Interviewee 24*** | Design Manager | Construction | KSA | 2015 | Male | No | Greek |
| ***Interviewee 25*** | Head of Planning and Analysis | Shipping | Qatar | 2012 | Male | No | Greek |
| ***Interviewee 26*** | Transformation Advisor | Banking/Financial Services | KSA | 2014 | Male | No | Irish |
| ***Interviewee 27*** | Operations Director | Construction | KSA | 2014 | Male | Yes | Irish |
| ***Interviewee 28*** | Senior Branch Manager | Banking/Financial Services | Qatar | 1998 | Male | No | Sri Lankan |
| ***Interviewee 29*** | Head of Financial Services | Digital Financial Services | KSA | 2013 | Male | No | American |
| ***Interviewee 30*** | Construction Manager | Construction | UAE | 2007 | Male | Yes | Egyptian |

## Appendix G: Representative Quotes from Associated Themes

| Experiencing |
|---|
| "So, one of the first things I did when I came here was I insisted that all the guys did timesheets. They recorded the times in which they work on very specific projects. The effect it had in the office was like a bombshell because the Filipinos, the Indians, all looked at that as if I was – how would you put it – checking on them, making sure – Where they would have been just quite happy just work away without having to sort of say, 'I worked on this project in so many hours, I worked in this project...' So, they felt as if they were under pressure. It almost had a negative role…So that was difficult." (Interviewee 16) |
| "My biggest challenge is that I have a number of people reporting to me. And the concept for them – and they're quite reasonably senior guys, sort north of 20 years down to five – and for them the prospect of reporting to a non-Saudi was probably not something that they took too easily. And consequently, there was quite a bit of push back, particularly on an evaluation stage. And I've evaluated them on four occasions at this stage over the last 10/12 months." (Interviewee 13) |
| "…so, I came into a situation where I was the executive director for administration. I had seven directors reporting to me. Three of them were no problem. One was invisible. And the other three were major problems. And the major problems were because I was a Westerner and I was temporary – as I wasn't a Saudi, I wasn't a Muslim, I wasn't permanent there. And they went around me – and it wasn't just me, it was my predecessor as well who was American – and went to the CEO. And found this very difficult to cope with because my CEO is telling me I'm responsible for delivering results on these particular services through them, while he's entertaining them through the back door. And I found it very difficult to build a positive relationship with them and with him." (Interviewee 12) |
| "The one that I'm thinking about is we had to meet a female local manager here, and you don't know what to do, whether to shake hands, whether to stand up, whether to address – You don't know this stuff because we are not used to this." (Interviewee 19) |

| Reflecting |
| --- |
| “And they felt as if it was somebody coming in and trying to sort of get the best out of them or check on them and see what they were doing. So culturally, it is not what the guys were experienced in doing. So, there was a lot of resistance to it, a lot of resistance…I did a couple of presentations to them. I tried to sort of put my arm out and say, 'Look, I'm not checking up on you. I need this information for future projects.' What I said to them was, 'We as a company need to be competitive with other people. We need to put in quotations that are competitive so we can get additional work to keep you guys employed. And I need to know how long it takes to do a specific task.' I sort of tried bringing them along with that, that they were part of the team and I needed their information.” (Interviewee 16)<br><br>“And you see there is a financial implication to this for which they might expect. And considering that, we are trying to establish a new culture here in the (name of department] – performance related as opposed to experience related, I suppose, or time spent in the organization. I think there was a certain amount of undercurrent was presented to me and I got feedback that I was not a popular boss. You know it was a challenge…But it wasn’t easy, I’ll be honest with you, the first engagement regarding the evaluation was quite hostile.” (Interviewee 13)<br><br>“It looks different, because you’re dealing with nationalities and cultures. You still have to sit back and figure out who is who. And who is related to who. And who doesn’t like who. And why. And who’s well regarded and who’s not and what’s their attitude. And what do they need. And how can you help them or how can you avoid getting entangled in their problems. So, it’s easy to fall into the trap of thinking ‘everybody loves me’. They don’t. Some people dislike me because they dislike the idea of me being a foreigner taking their job or whatever it is.” (Interviewee 12)<br><br>“I tried to copy what the others were doing but even they did not know what to do. So in the end, I asked and it was the best thing to do, was just to stand up, no handshake, no physical contact.” (Interviewee 19) |

| Thinking |
| --- |
| “I learned, probably, to treat certain nationalities carefully rather than going in and starting, which I did at the start, to be perfectly honest. You know, I went in and said, 'Where the hell is that, and why have you done that?' “(Interviewee 16)<br><br>“So, the learning was really that when you’re communicating, understanding what style and the makeup of the individuals that you’re communicating or managing – and then trying to flex and stretch your style to suit that.” (Interviewee 13)<br><br>“And the one I managed to win over was the most difficult one, but what I did with him was I went to visit him quite a lot. And I said I’m not trying to undermine you, I’m not trying to remove your back door, I’m not trying to do anything like that. I just need to know what’s going on, so that when I’m asked, I can answer. When something comes up, I can protect, or defend or advance or promote for your department. He was the director of engineering and we were building a new hospital, so it was critical that we worked well together, and in the end we did. But it was a big challenge. So I suppose, what did I learn from that, in hindsight, I think I wouldn’t have wasted my energy on the other two. I wouldn’t have wasted my energy on my boss. I would have built the relationships I could and worked with that.” (Interviewee12)<br><br>“I learned when encountering a female local here, you should keep your distance, you should not shake hands or make any physical contact with them.” (Interviewee 19) |
| **Acting** |
| “But certain nationalities, now, you've got to go along and say to them, 'Great job, well done. I appreciate what you have done but I need this from you now.' This approach is better than the heavy-fisted approach with certain nationalities.” (Interviewee 16)<br><br>“You really do have to hone and change and flex and stretch your style to suit the style of the people you work with. Particularly found this as an issue, because how I was saying what I was saying was important. And yes, it was important initially, but the ability thereafter to persuade and involve people in the process and make them realize that there were reasons for the evaluation – why they were getting the evaluation, what the evaluation would mean – and as such this was a process that was here to stay. And whether it was me or somebody else who was doing it, they would have to come to terms with it anyway.” (Interviewee 13) |

“Here, in Doha, now there are a lot less Saudis. In Saudi Arabia, the majority of the population is Saudi. Here, the Qatar population is in a very small minority, but all the senior positions are held by Qataris. And quite a number of the middle management are Qataris as well. There’s no particular guy, he doesn’t report to me, he reports in a different directorate, but he’s the head of patient billing, so he’s quite important to me. What I do in the insurance has the ability to sideline him completely – but he’s a Qatari so I have to be very careful that I don’t alienate him. So, what I did was I went and started to meet with him on his own and get him involved in the insurance, not from an operational point of view, but from an advising point of view. And so, we’d bring him to meet with the ministry of health to advise them on the setting up aspects. He’s been dealing with who’s eligible for what for 20-something years. He knows it inside out, but he’d never been consulted at all. So in that case it worked out very well. And then I think if it hadn’t had been for the run-ins with the guys in Saudi, would I have had the presence of mind to sit back and say, well how can I involve him? “(Interviewee 12)

“In later experiences, I stopped doing this. I just say hello from a distance, and this is it.” (Interviewee 19)

| Adjusting |
|---|
| “It took me a good 18 months to adapt to the culture. I found I adapted better to the culture when I worked with [first company’s name]. It was a truly Arab company. Whereas working in [second company’s name], it was a very Western culture and you didn't connect as much with the local culture because it was all Westerners. It was a Western system and you didn't empathize and embrace the Arab culture. In fact, [first company’s name] was a richer experience.” (Interviewee 22)<br><br>“...you need to be able to adapt to the people you handle. You need to align your expectations to what they can offer you. They have different characters, different ways of seeing the world in general. You need to adapt to that. Also, you need to manage your own beliefs and perceptions so, again, you adapt to the situation here. It's kind of different. So, things you wouldn't be expected to do in Spain, in Europe or the States, you would have.” (Interviewee 25)<br><br>“And so, I came six years ago to Saudi Arabia, never having been to the Middle East at all. I’d only been in Toronto, where I trained and lived for all of my career. So, the transition was fairly large, I would say. I’d been used to working in the Canadian healthcare system. So, the Ministry of Health expectations here, and the expectations of the Kingdom of Saudi Arabia, the expectations of where it is considered a governmental hospital, the [name of hospital], learning all those expectations were new. It took me about a year, I would say, to acclimatise to the change.” (Interviewee 2) |

## Appendix H: Global Leadership Competencies

### Table 1 Managing Self Competencies

| ***Character*** Integrity (3) | ***Resilience*** Resilience to Stress | ***Inquisitiveness*** Inquisitiveness (4) |
|---|---|---|
| Exhibit Character Authenticity (2) | Resilient, resourceful, | Curiosity & Learning |
| | Optimistic and energetic | Aggressive Insight |
| Honesty | Resilience (3) | Open- mindedness (4) |
| Maturity | Emotional Stability | Openness to Experience (2) |
| Trustworthy | Emotional Resilience | Inviting the Unexpected |
| Make Ethical Decisions (2) | Non-Stress Tendency (2) | Nonjudgementalness |
| Self-Identity (2) | Stress Management | Initiative (3) |
| Self-Mastery | Optimism (3) | Quest for Adventure |
| Accounting | Realistic Optimism | Passion for Diversity (2) |
| Conscientiousness | Self-confidence (3) | Humility (2) |
| Self-Awareness (5) | Personal Management (3) | Confident Humility |
| Core Values and Flexibility | Life Balance (2) | Motivation to Learn |
| Passion to Excel (3) | Stable Personal Life | Learn from Experience (3) |
| Tenacity (2) | Self-Regulation | |
| Courage (3) | Patience | |
| Overcoming Adversity | | |
| **Flexibility** | **Global Mindset** | |
| Flexibility (4) | Global Mindset (6) | |
| Embrace Duality | Cosmopolitanism (3) | |
| Cognitive Complexity (3) | Cognitive Complexity (4) | |
| Thinking Agility | Thinking Globally | |
| Authentic Flexibility | | |
| Agility | | |
| Open-minded and flexible in thought & tactics | | |
| Interest Flexibility | | |
| Tolerance of Ambiguity (3) | | |

*(#) indicates multiple references for the designated competency

## Definitions of Managing Self Competencies:

**Character:** can be defined as an admixture of integrity, maturity and conscientiousness. Black et al. (1999) give priority to character, describing it as one of four vital elements. Likewise, Bird and Osland (2004) demarcate it as one of four "threshold traits" regarded as a cornerstone for other global leader skills. McCall and Hollenbeck (2002) conceive integrity as core honesty. A second aspect of character is maturity, which presupposes a sense of self-awareness and clarity regarding personal values as well as a measured sense of a person's place in the world. Relevant to this is a notion of accountability, being accountable for one's deeds. Bird et al. (2010) call this aspect self-Identity, which they describe as an awareness of one's personal values and the way they affect one's interactions with others. Gundling et al. (2011) categorise this as key values and flexibility. The third aspect of character, conscientiousness, a predispositional quality closely connected to perseverance, is part of the Big Five set of personality characteristics (Caligiuri and Tarique, 2009). Kets de Vries and Florent-Treacy (1999) call this determination, a commitment to persisting through tough times. It is closely connected to the predispositional quality of conscientiousness that is part of the Big Five set of personality characteristics (Caligiuri and Tarique, 2009).

**Resilience:** alludes to a set of dimensions that corollate with a global leader's capability to deal with the highly stressful challenges of leading across multiple time zones, large distances, numerous cultures, and widely diverse national and international political and regulatory systems. This skill is comprised of two broad dimensions. The first refers to a set of predispositional and attitudinal abilities. The predispositional aspects of this dimension encompass non-stress tendency, optimism and tenacity, which are also described as hardiness or low neuroticism (Costa and McCrae, 1992). Attitudinal aspects encompass self-confidence and resourcefulness. The second dimension is essentially behavioural and incorporates the pursuit and management of activities and lifestyle choices – exercise, meditation, hobbies, proper rest, dietary habits, etc. – that decrease stress and enable recovery from stressful activities. In general, this dimension comprises a life balance between work, social interest, and the preservation of personal psychological, physical, social and spiritual welfare.

**Inquisitiveness:** the most mentioned skill in this group, relates to a natural curiosity, an openness to learning, and humility. Black et al. (1999) view inquisitiveness as the most vital personal quality of global leaders, regarded as an animating force that undergirds other skills. A second aspect of this skill is openness, which is broadly framed as being open to new experiences, new people and new ideas. Moro Beuno and Tubbs (2004) describe it as open-mindedness and identify a linked aspect of eagerness to learn. The third aspect is humility, which can be defined as not letting pride or self-consciousness impede learning. Rosen et al. (2000) make reference to it as confident humility, not feeling threatened by the need to learn and open to being taught by other people. Bird and Osland (2004) describe humility as a passive equivalent to inquisitiveness. In contrast to actively seeking out and exploring novelty and difference, humility requires letting oneself be taught by other persons.

**Flexibility:** entails willingness to adjust and adapt to a multitude of situations. It includes a cognitive element, intellectual flexibility, which Black et al. (1999) describe as embracing duality, and it supports and parallels the cognitive complexity aspect of a global mindset. Bird et al. (2010) put emphasis on tolerance of ambiguity, a construct established more generally in psychology; however, their strain of tolerance of uncertainty is specific to the intercultural frame common to global leadership. Flexibility also contains a behavioural element, behavioural flexibility, which encompasses a willingness to adjust or adapt one's behaviours to suit varied circumstances or situational demands (Bird et al., 2010).

**Global Mindset:** the final skill, is a cognitive skill that displays a combination of perspective, knowledge and attitude. It consists of two aspects. The first is cognitive complexity, specifically a highly contextualised, multi-layered, multifaceted approach to the environment. The cognitively complex global leader starts from a premise that any situation is characterised by multiple interdependencies and that relationships implicate dynamical, complex characteristics. The second aspect of a global mindset is cosmopolitanism, an interest in and knowledge of the world – nations, social and political institutions, people, and cultures, etc. (Levy et al., 2007).

Table 2 Managing People and Relationships Competencies

| ***Interpersonal Skills*** | ***Cross-cultural Communication*** | ***Valuing People*** |
|---|---|---|
| Emotional Intelligence (2) | Cultural Intelligence | Respect for Others (2) |
| Empathy (3) | Cross-Cultural | |
| | Communication (3) | Respectful Modernizer |
| Emotional Sensitivity | Culture Bridger | Cultural Awareness (2) |
| Extraversion (2) | Cultural interest and sensitivity | Cultural Acumen (2) |
| Social Flexibility (6) | Appreciating Cultural Diversity | Skilled People Reading |
| Agreeableness | Cross-Cultural Understanding (2) | Understand Actors |
| Presence | Communication Skills (2) | Showing Inclusiveness |
| Relationship Interest (2) | Mindful Communication | Pragmatic Trust |
| Interpersonal Engagement | Work with colleagues from other countries | Create & Built Trust (2) |
| Collaborative | | |
| Individualism Sensitivity | | |
| Built Relationships | Language skills (2) | |
| | Supervise employees of different nationalities | |
| Results through Relationships (2) | | |
| Intercultural Sensitivity | Negotiate in other countries or with people from other countries | |
| Intercultural relationship skills (3) | | |
| Conflict Management | Cultural Self-Awareness | |
| Skills Diplomacy | | |
| Influencing /Motivational Skills | | |
| Urgent Listening | | |
| Instilling Trust | | |

| Empowering Others | Teaming Skills |
|---|---|
| Being able to empower others Energizing | Team Building (2) |
| Rewarding & Feedback | Managerial ability with an emphasis on teamwork and interpersonal skills |
| Connective Teaching | Multicultural Teaming |
| Sharing Leadership | Team Management skills |
| Develop Future Leaders | Team-spirited |
| Demonstrating appropriate confidence in self and others | Blender |
| Coaching and Guidance | |
| Skills Delegation | |

*(#) indicates multiple references for the designated competency

### Definitions of Managing People and Relationships Competencies:

**Valuing People**: although the third-most-prevalent skill, also appears to be fundamental in that all other skills can be viewed as based on it. It incorporates three distinctive elements that have at their basis an acknowledgment of the value of people as individuals. The first is a respect for people and their differences. The second element is that this respect either leads to or is derived from a deep understanding of people as individuals and a capability to understand people – their emotions, motivations and intentions. The third element of Valuing People is an inclination towards and a capability to create and conserve trusting relationships (Bird, 2017).

**Interpersonal Skills:** constitute the main skill within the grouping, and include a scope of predispositional, attitudinal, motivational, cognitive and behavioural elements. For instance, relationship interest and extraversion are usually regarded as predispositional (Bird et al., 2010), whereas interpersonal engagement and emotional sensitivity are more often considered as cognitive and attitudinal respectively. Social flexibility and building relationships are best categorised as behavioural competencies. The competency can be classified into two wide facets: emotional intelligence and relationship management competencies. The former incorporates such capabilities as sensitivity, self-awareness and interpersonal engagement. The latter encompass facets connected to behaviours that entail managing relationships (e.g., influencing, urgent listening, and using relationships to achieve results).

**Cross-cultural Communication**: the third skill, is focused on communicating across cultural differences. Cross-cultural communication usually presupposes a high level of mindfulness (i.e., a conscious awareness of cultural, contextual and individual differences and the way in which these differences impact how messages are encoded, transmitted, received, and interpreted, as well as the mutual feedback procedure). There are two components of this skill. General cultural awareness can be categorised into awareness of cultural differences of other individuals and awareness of one's own cultural effects. The second part correlates with specific cognitive and behavioural competencies in an intercultural setting. These include the capability to speak the other individual's language, competencies at negotiating across cultures, and the capability to contextualise general communication skills in culturally suitable ways (Bird, 2017).

**Empowering Others:** the fourth skill, addresses the capability of global leaders to energise direct reports, colleagues, and superiors by stretching their sense of personal self-efficacy. This may necessitate coaching competencies, understanding how to assign authority in culturally suitable ways, and the capability to instruct others or, in general, to support their personal and professional development (Bird, 2017).

**Teaming Skills**: the final skill, links to the capability to work productively in multicultural and global virtual teams. This comprises the capability to lead teams as well as to take a subordinate role and work as a valued contributor to the team's effort (Bird, 2017).