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EXPLORING THE SUCCESS OF EXPATRIATES OF U.S. MULTINATIONAL FIRMS IN MEXICO

Steven Edmond

To examine U.S. multinational corporations, this research utilizes a multivariate model to differentiate among IHRM practices and their impact on U.S. expatriate performance. Questionnaires sent to 481 corporations combined with an analysis of the six independent variables, including selection criteria, cross-cultural training, and inability of spouses to adjust help us to understand U.S. expatriate rates of success and failure in Mexico. While, to a considerable degree, an IHRM model based on mainstream literature can predict U.S. expatriate success and failure rates, this research demonstrates the significant discrepancies that exist when comparing the results of the relationship of each variable individually.

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International staffing is a growing area of international human resource management (IHRM). In addition to the myriad challenges of operating in a global market, the proper placement of managers to ensure their maximum effectiveness in a foreign assignment is of tantamount concern to corporations. This study

Steven Edmond is Professor of Management at Huston-Tillotson College in Austin, Texas, as well as Adjunct Professor of International Business at TEC de Monterrey, Campus Estados de Mexico.

has as its main focus IHRM effectiveness as measured in terms of U.S. expatriate failure rates in Mexico since the implementation of the North American Free Trade Agreement (NAFTA).

In the brief time since its 1994 implementation, NAFTA has managed to change the competitive strategies in which firms do business in North America. Many firms in the United States, Canada, and Mexico, are currently experiencing economic growth (Carrera, 1999; Gooley, 1998). U.S. firms are shifting some operations south of the border to take advantage of economic opportunities, and as a result, organizations are also relocating managers across borders to oversee these operations. However, as might be expected, U.S. multinational corporations (MNCs) are discovering that operating across their borders can present some human resources management problems (Flynn, 1994; Luthans et al., 1997; Valentine, 1997). Managers of U.S. multinational corporations have not fared as well as their European and Japanese counterparts in successfully acclimating to a different culture. Studies by Tung (1981), and more recently by Harzing (1995), have revealed that U.S. expatriates prematurely return home before their foreign assignments are completed at a far higher rate than the Europeans and the Japanese. Cultural differences have impeded what otherwise might be relatively smooth adaptations to foreign business assignments.

In response to this growing problem, several organizations have developed training programs aimed at managers who are natives of the United States, Canada, or Mexico to operate effectively in an integrated North American economy (Wyeth, 1995). These programs are in direct response to the needs expressed by many companies for training that will orientate managers to the variety of national and professional cultural differences that exists among the NAFTA countries. "Many companies underestimate the complexities involved in international operations" (Scullion, 1994, p. 86). It is therefore important to examine the

impact that the differences in IHRM practices employed by U.S. firms operating in Mexico have had on U.S. expatriate failures.

This study proposes to determine if an IHRM model based on mainstream literature is a good predictor of U.S. expatriate failure rates in Mexico. It has been well documented that United States MNCs usually have operational problems while conducting business across national boundaries. The Study Background section of this article defines the broad problem as well as specific problems in the field of IHRM. In an effort to define these problems more precisely, it was necessary to conduct archival research documenting early human resource management efforts across borders. The early background information defined, in accordance with prior research, some of the variables having a direct impact on expatriate performance. The Method section addresses the population and sampling size. Also, from the background information, a questionnaire was developed to collect data regarding U.S. expatriate performance in Mexico. This data was used to compare the theories of prior research with the current status of expatriate performance in Mexico.

Several hypotheses were derived from prior research. Data collected from the questionnaires tested these hypotheses utilizing correlations obtained and simple multiple regression analysis. In the Results section, the outcome of the data collected is revealed.

The Conclusion section of this article reveals that an IHRM based on mainstream literature can predict U.S. expatriate failure rates in Mexico. However, there were some discrepancies when comparing the results of the relationship of each variable individually to expatriate failure rates with the results from prior research. Major limitations discussed in the Conclusion section address the size, the level of internalization, and the length of time that the firms did business in Mexico. These factors were not included in this study.

I. STUDY BACKGROUND

Defining Expatriate Failures

Inadequate human resources planning has the potential to create many problems for MNCs (Tung, 1984). Firms operating a business in a foreign country face many managerial problems that are quite different from those at home. Perhaps the biggest problem that these firms encounter is expatriate failure. Dowling, Welch, and Schuler (1999, p. 78) stated that, "The term expatriate failure has been defined as the premature return of an expatriate (i.e., a return home before the period of assignment is completed)."

Much of the literature on expatriate failure is based on research performed by Rosalie Tung. Tung (1981) completed one of the most comprehensive studies on expatriate selection and overseas assignment evaluation that included surveying 300 U.S., 246 West European, and 110 Japanese MNCs. Tung reported that MNCs in the United States have not fared as well as their European and Japanese counterparts in successfully acclimating managers to different cultures. Recent studies (Black and Gregersen, 1991; Engen, 1995; Harzing, 1995) have confirmed Tung's conclusions that an inordinate number of U.S. expatriates prematurely return home before their foreign assignments are completed.

There is an abundance of literature that addresses certain issues of IHRM effectiveness as measured by expatriate failures. From past research, six main predictors of expatriate failures have been proposed: selection criteria (Black and Stephens, 1989; Mendenhall, Dunbar, and Oddou, 1987; Tung, 1979; Tung, 1981), cross-cultural training (Adler, 1981; Black and Gregersen, 1991; Earley, 1987; Shumsky, 1992), compensation (Hodgetts and Luthans, 1993; Stuart, 1991), repatriation (Allen and Alvarez, 1998; Dowling, Welch, and Schuler, 1999; Engen, 1995; Harvey,

1997), cultural background (Hambrick, Davison, Snell, and Snow, 1998; Hofstede, 1983; Melan and Graham, 1998), and inability of spouse to adjust (Mendenhall and Oddou, 1985; Tung, 1981). This current study examines all six of these predictors simultaneously in an effort to determine their collective impact on expatriate failure rates.

Selection Criteria

According to research by Black, Gregersen, and Mendenhall (1992), the major selection criteria for overseas assignments can be grouped into two categories:

- 1) those criteria necessary to do the job, that is, technical and leadership skills, and
- 2) those criteria necessary to work in a foreign location, that is, adaptability of manager and family, knowledge of host-country language, and personal competencies such as a formal education.

These criteria are considered key success factors for expatriate assignments.

Cross-Cultural Training

Research by Black and Mendenhall (1990) suggested that cross-cultural training reduces expatriate failure rates and increases job performances. The purpose of cross-cultural training is to improve the location-specific skills of a manager, who is assigned an overseas duty, as well as to improve the coping skills of the manager's spouse and family. Cross-cultural training programs, according to Shumsky (1992), have been in existence for over 25 years. More recently, one such program was developed specifically for preparing North American managers to operate

in the NAFTA economies (Wyeth, 1995). The structure of a basic cross-cultural training program ranges from simply viewing videotapes on how to cope in foreign countries to training in very specific cultural awareness and language courses (Mendenhall, Dunbar, and Oddou, 1987). These cross-cultural training programs have proven to be effective in reducing expatriate failures in foreign assignments (Earley, 1987; Tung, 1987).

Evidence suggests that failure is not always the result of the expatriate's inability to adapt to a foreign assignment, but, instead, failure results from the expatriate family's inability to adapt to a new culture (Murray and Murray, 1986; Shumsky, 1992; Tung, 1981). In an effort to stem expatriate failures, Brewster and Pickard (1994) suggested a better selection process of overseas candidates. The preferred selection process is one that combines both job criteria as well as the potential ability of the candidate as well as the ability of the candidate's family to accept and adapt to a new culture.

Compensation

Research by Katz and Seifer (1996) defined a fair and equitable compensation package as one that, "ensure[s] pay parity between similar levels of managers in the home and host countries" (p. 48). When compensation is not adapted to local markets, that scenario can create an array of problems and impact IHRM effectiveness (Hodgetts and Luthans, 1993). In a study conducted by Herbert and Deresky (1987), it was reported that expatriate failures could often be traced to overseas assignments that do not offer a fair and equitable compensation package.

Repatriation

Repatriation plans refer to the process of bringing overseas managers back to the home-country (Allen and Alvarez, 1998).

Allen and Alvarez state that expatriates must feel comfortable with a company's repatriation process. It is well documented that an expatriate's anxiety over the lack of a good plan can sometimes lead to lower than expected job performance by that worker. Typically, an expatriate's concerns about repatriation include some of the following issues: personal finance, readjustment to the home-country's corporate structure, and readjustment to life at home.

Cultural Background

Several scholars (Hambrick et al., 1998; Hofstede, 1983; Meloan and Graham, 1998) agree that the main challenge that MNCs encounter when doing business internationally stems from the cultural differences. Cultural values have a major influence on people's interpretation and understandings of the ways to conduct business (Hambrick et al., 1998). It is for this reason that international managers must have an understanding of how cultural values impact the operation of businesses across national boundaries.

Inability of Spouse to Adjust to Foreign Country

Research has revealed that the family is an important variable for expatriate success (Black and Stephens, 1989; Shumsky, 1992; Tung, 1981). In spite of the evidence that suggests that spouse and family issues are important to the acceptance and to the success of international assignments, many MNCs still ignore those findings and do not include the employee's family members and family-related issues in their selection process (Sievers, 1998).

Theoretical Framework

This review of literature suggests that the constructs of selection, cross-cultural training, compensation, repatriation, cultural

background, and the inability of spouses to adjust each have a direct relationship to expatriate failures. To examine the applicability of each of these six variables to expatriate failures for U.S. managers (from U.S. MNCs operating in Mexico), seven hypotheses were posited for this study.

H1: There is a correlation between the appropriate selection criteria for expatriates of U.S. MNCs and expatriate failure rates for managers with assignments in Mexico.

H2: There is a correlation between the quality level of U.S. MNCs' cross-cultural training programs and expatriate failure rates for managers with assignments in Mexico.

H3: There is a correlation between the amount of U.S. expatriate compensation and expatriate failure rates for managers with assignments in Mexico.

H4: There is a correlation between the quality level of a U.S. MNCs' repatriation program and expatriate failure rates for managers with assignments in Mexico.

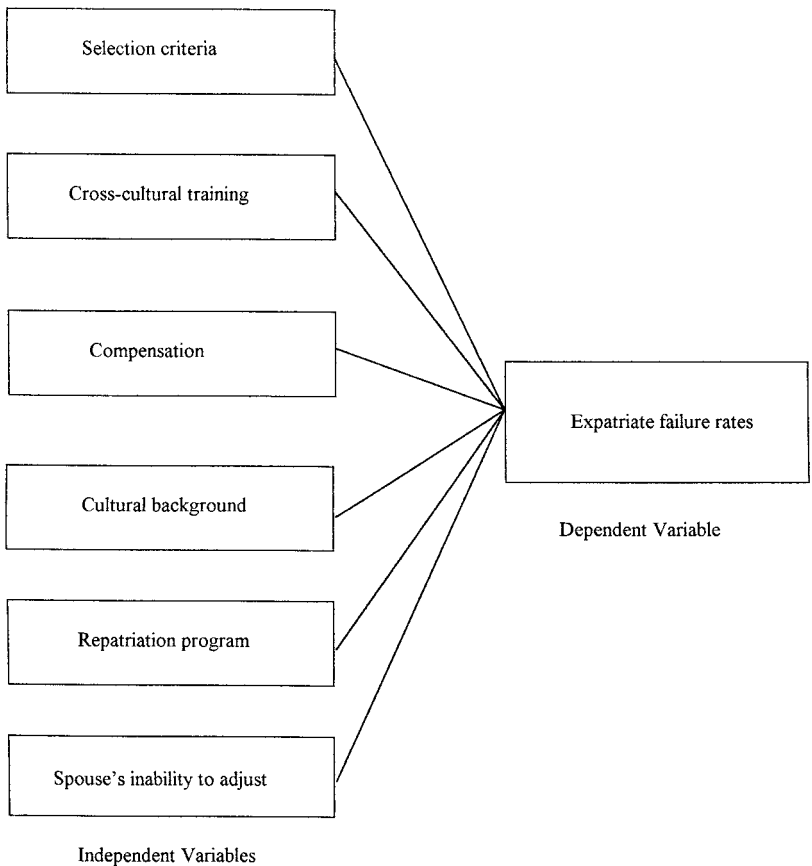
H5: There is a correlation between the cultural heritage of managers and expatriate failure rates for U.S. expatriates assigned in Mexico.

H6: U.S. expatriate failure rates for managers assigned in Mexico are higher when the manager's spouse and family are unable to adjust to the new locale.

H7: The six independent variables of selection criteria, cross-cultural training, compensation, repatriation, national culture, and inability of spouse to adjust will explain U.S. expatriate failure rates for managers assigned in Mexico.

In an effort to explore the applicability of existing IHRM models as predictors of U.S. expatriate performance in Mexico, a theoretical framework was developed based on prior studies (Figure I).

Figure I
Theoretical Framework



Study Design

A correlational cross-sectional design was used in this study. The data were collected over a 30-day period. The unit of analysis for this study was a U.S. MNC having operations in Mexico.

II. METHOD

Population and Sampling

This research involves a sample of United States-based MNCs representing various industries. A database of U.S. MNCs with operations in Mexico was compiled from a listing from the *Directory of U.S. Firms Operating in Foreign Countries* (1999). From the database population of 481 MNCs, 94 usable surveys were received, a return rate of 19.5 percent, which made the sample representative.

Instrumentation

A questionnaire was developed for use in gathering data for this study. The HRM administrators responded to a survey regarding IHRM practices as well as expatriate performance for the years 1996 to 1998.

As a pre-test, the questionnaire was sent to five human resources management administrators of MNCs to critique the instrument's

- 1) readability,
- 2) ability to facilitate a response,
- 3) ability to measure the variables.

The survey instrument consists of 27 items and is divided into two parts. Part I of the survey pertains to IHRM practices and Part II pertains to expatriate performance and demographics. The survey questions were derived from existing literature in the

field of IHRM that identified the activities of selection, training, compensation, and repatriation as well as cultural background and inability of spouse and family to adjust, as all having a distinct influence on expatriate failure rates.

Analysis of Data

The main purpose for collecting the data was to test hypotheses relating to IHRM practices and their impact on expatriate failures. Correlations obtained and simple multiple regression analysis were utilized for the tests.

III. RESULTS

The data revealed that the expatriate failure rates in this study were significantly lower than that from the results of past studies. Prior studies reported that U.S. expatriate failure rates were between 20-40 percent. The current study reports U.S. expatriate failure rates in Mexico between 7-9 percent over the years 1996 to 1998.

An alpha reliability analysis was performed for the variables in this study. Table I shows the reliability coefficients for the six independent variables.

Table I
Reliability of Measures: Alpha Coefficients

Variable	Number of Items	Alpha
Selection criteria	3	.3535
Cross-cultural training	3	.7647
Compensation	2	.7322
Repatriation	6	.6267
National culture	6	.7212
Inability of spouse to adjust	12	.7395
Expatriate failure	6	.7179

Hypothesis 1 stated that there is a correlation between the selection criteria for expatriates of U.S. MNCs and expatriate failure rates for managers with assignments in Mexico. In the analyses (Table II), the correlation between selection criteria and expatriate failure rates for U.S. cross-border assignments was not significant ($r = .152$, $p = .170$). Therefore, this hypothesis was not supported.

Hypothesis 2 stated that there is a correlation between the quality level of U.S. MNCs' cross-cultural training programs and expatriate failure rates for managers with assignments in Mexico. In the analyses (Table II), the correlation between cross-cultural training programs and expatriate failure rates for U.S. cross-border assignments was not significant ($r = .118$, $p = .289$). Therefore, this hypothesis was not supported.

Hypothesis 3 stated that there is a correlation between the amount of U.S. expatriate compensation and expatriate failure rates for managers with assignments in Mexico. In the analyses (Table II), the correlation between compensation programs and expatriate failure rates for U.S. cross-border assignments was extremely weak ($r = .106$, $p = .342$), however, this hypothesis was accepted.

Hypothesis 4 stated that there is a correlation between the quality level of a U.S. MNC's repatriation program and expatriate failure rates for managers with assignments in Mexico. In the analyses (Table II), the correlation between repatriation programs and expatriate failure rates for U.S. cross-border assignments was not significant ($r = .029$, $p = .794$). This hypothesis was not supported.

Hypothesis 5 stated that there is a correlation between the cultural heritage of managers and expatriate failure rates for U.S. expatriates assigned in Mexico. In the analyses (Table II), the correlation between the cultural heritage of managers and expatriate failure rates for U.S. cross-border assignments was

Table II
Correlations for Variables Examining the Relationship Between IHRM Practices and
Expatriate Failures (n = 94)

	Expatriate Failure	Selection Criteria	Cultural Training	Compensation Package	Repatriation Program	Cultural Heritage	Adaptability
Expatriate failure	1.000						
Selection criteria	0.152	1.000					
Cultural training	-0.118	0.348*	1.000				
Comp package	0.106	-0.103	-0.030	1.000			
Repatriation program	0.029	0.376*	0.329*	-0.201	1.000		
Cultural heritage	-0.065	0.168	0.186	-0.024	-0.096	1.000	
Inability to adapt	0.791*	0.094	-0.084	0.195	-0.020	-0.059	1.0

*Correlation is significant at the 0.01 level.

not significant ($r = -.065$, $p = .560$). Therefore, this hypothesis was not supported.

Hypothesis 6 stated that the U.S. expatriate failure rates for managers assigned in Mexico are higher when the manager's spouse and family are unable to adjust to the new foreign locale. As can be seen from Table II, the correlation between inability of spouse to adjust and expatriate failure rates is significant ($r = .791$, $p = .000$). Thus, this hypothesis was substantiated.

Hypothesis 7 stated that the six independent variables of selection criteria, cross-cultural training, compensation, repatri-

Table III
Results of the Multiple Regression Analysis
Regressing the Six Independent Variables
Against Expatriate Failure Rates

Model Summary					
R Square .6415					
Predictors	Beta	t-Value	p-Value		
Selection criteria	0.058	1.271	0.208		
Training	−0.008	−1.236	0.220		
Compensation	0.039	−0.464	0.644		
Repatriation	−0.024	0.379	0.829		
Cultural heritage	0.018	−0.217	0.829		
Spouse unable to adjust	0.780	10.946	0.000		
Analysis of Variance					
	SS	df	MS	F	Sig F
Regression	13.803	6	2.301	22.664	.000*
Residual	7.715	76	.102		
Total	21.518	82			

*Significant at the $p < .001$ level.

Predictors: Inability to Adjust, Repatriation, Cultural Heritage, Compensation, Training, and Selection Criteria.

ation, national culture, and inability of spouse to adjust will explain U.S. expatriate failure rates for managers assigned in Mexico. Table III shows the multiple regression analysis regressing the six independent variables against expatriate failures for Mexico. Together, the six independent variables predict expatriate failure rates in Mexico ($r^2 = .641$, $F = 22.65$, $p = .000$). The variable inability of spouse to adjust to a foreign locale was the only one with a significant beta (.780), therefore, that variable has the greatest impact on expatriate failure rates. This hypothesis was substantiated.

IV. DISCUSSION AND CONCLUSION

According to the multiple regression analysis regressing the six independent variables against expatriate failures, together, the six independent variables can predict expatriate failure rates in Mexico. However, this study identified several contradictions when compared with results from prior research. The data indicated that the respondents failed to heed the advice offered by prior research for expatriate success. Still, the expatriate failure rates in this study were much lower (7%–9%) than in prior research (20%–40%).

Black and Gregersen (1991) and Tung (1981) asserted that an appropriate selection criterion should lead to a reduction in expatriate failure rates. These researchers describe an appropriate selection criteria as one that does not rely solely on an applicant's technical and managerial skills, but relies also on human relation skills and on the spouse and family's abilities to adapt to a foreign country. The current study revealed that most of the respondents rely primarily on the technical and managerial abilities of an applicant during their selection process.

Prior research suggests that cross-cultural training reduces expatriate failure rates (Mendenhall et al., 1987; Tung, 1987).

The degree of influence of a cross-cultural training program on expatriate failure rates is dependent upon the rigor level of the program. The findings of the current study are inconsistent with the results of prior research which suggest that the less rigorous (length in hours) the cross-cultural training, the higher the expatriate failure rates. Although the majority of the respondents either did not offer cross-cultural training or offered a low-level training program, expatriate failure rates were still lower than the results of established research.

Prior research revealed that a fair and equitable compensation package is very important in assuring expatriate success (Herbert and Deresky, 1987). The current research supports this assumption.

It has been suggested that an expatriate's concern about repatriation issues can affect his or her performance on an international assignment (Adler, 1987; Dowling et al., 1999). The findings of this study are inconsistent with prior research in that, even though the respondents did not commit adequate resources to quality repatriation programs, the expatriate failure rates nevertheless were lower than the established results. The respondents' repatriation programs, in spite of being of marginal quality, did not appear to negatively influence expatriate failure rates.

Hofstede's 1983 study of culture revealed that one's cultural heritage can influence the way business is practiced, thereby affecting HRM effectiveness. In 1981, Tung did a comprehensive study on the training of personnel for international assignments and found that one's cultural heritage has a major impact on expatriate failure rates. The assumption that a manager's cultural heritage has a major impact on expatriate failure by the above scholars is not consistent with this current research. In the majority of the cases, the respondents indicated that they ignored an applicant's cultural heritage when assigning managers

to Mexico. Managers assigned to Mexico by U.S. MNCs included Hispanic Americans, African Americans, Anglo Americans, and others representing various cultural backgrounds. In essence, a manager's cultural background seems to have no impact on expatriate failure rates.

In identifying the main reason for expatriate failures, scholars (Mendenhall and Oddou, 1986; Tung, 1981) point to the spouse and family's inability to adjust to the new locale. The current research supports the results of prior research—a spouse's inability to adjust to a new locale is the major reason why expatriates return home prematurely.

Several reasons are offered for the nonsubstantiation of four of the seven hypotheses in this study. One possible reason is that most of the groundbreaking literature in the area of IHRM was written in the 1980s and usually from data collected in the 1970s. In the length of time since those unimpressive expatriate performances in the 1980s, U.S. firms have gained considerable experience in conducting business in foreign countries. This fact would help explain the lower rates of U.S. expatriate failures in this current research as compared to the results of prior research.

Second, the U.S. institutions of higher education are doing a very credible job introducing the fundamentals of doing business in a foreign country to future managers. In the 1980s, the American Assembly of Collegiate Schools of Business (AACSB) mandated that all universities and colleges integrate the teachings of international business into their business curriculum. Data from interviews of U.S. expatriates (a convenience sample) revealed that many of the younger U.S. expatriates/repatriates were first introduced to the concepts of international business through course work at their universities.

Finally, Mexico shares borders with the United States. Because of the close proximity to home, a great many U.S. expatri-

ate managers and their families do not feel the isolation of living in a foreign country such as in Asia or in Europe.

Implications for U.S. Management

It is clear from the findings of this study that the failure rates for U.S. expatriates in Mexico are considerably lower than the results of the well-established mainstream research. However, any degree of expatriate failure results in

- 1) the possibility of endangering a firm's ability to compete effectively,
- 2) wasted expatriate and family preparation costs,
- 3) wasted expatriate and family relocation costs, and
- 4) various indirect costs.

Thus, it is necessary for U.S. multinational corporations to reduce further or to eliminate totally, if possible, expatriate failures in their Mexico operations. In addressing these objectives, U.S. firms may want to consider a number of selection and staffing aspects of the foreign assignment.

First, it is recommended that firms develop a method to better screen the spouse and family's ability to adapt to a cross-border assignment. Prior studies on expatriate failures have indicated that if a manager's family is not happy, then the manager often performs poorly on the job and will eventually want to return home before the end of the foreign assignment (Hodgetts and Luthans, 2000). Adaptability screening should provide human resources management professionals with an indication of how well the family will cope with the many challenges of living in a foreign country. Such an adaptability screening process should focus on identifying what activities are important to each expatriate family.

Second, U.S. multinational corporations should consider sending more women managers to Mexico. Several studies (Adler, 1987; Harris, 1993) have revealed that women expatriates have a significantly higher success rate (97%) than their male counterparts. Since Mexico is not a country with national prejudices toward gender equity, U.S. firms should tap the large pool of U.S. women managers for cross-border assignments.

Third, U.S. multinational corporations should consider using most host-country nationals as a way of reducing expatriate failure rates in Mexico. Utilizing host-country nationals makes common sense in Mexico since there is a large cadre of qualified managers there. There are many managers in Mexico who were trained in the *maquiladoras*. These managers are bilingual and have a fairly good understanding of the U.S. business culture as well as the Mexican business culture. With these dual competencies, a Mexican host-country national can overcome any affects that cultural differences have on expatriate failures. Utilizing highly qualified host-country nationals would certainly increase the success rate of U.S. firms operating in Mexico.

Limitation and Future Research

A limitation of this study pertains to the non-control of a critical variable, the size of the organization. Although the size of an organization influences turnover rates (Rosse, 1991), no attempt was made to control the organization size of the subjects. According to Rosse's study, the larger the organizational size the lower the failure rates and vice versa.

In addition to the size of the organization, the degree of internationalization (export, license/franchise, FDI) and the length of time conducting business in Mexico were ignored.

Research is still needed on a wide variety of aspects concerning U.S. expatriate failures in Mexico. Further research is needed

to determine the gender affect on U.S. expatriate performance in Mexico. The current research did determine the percentage of U.S. female expatriates in Mexico; however, this study did not examine how well these expatriates performed.

Also, future studies should look at the various categories of U.S. expatriates with assignments in Mexico. Some categories worth examining include unmarried employees, married couples with children, married couples without children, and employees with prior international experience. Without endorsing one category over another, future study is needed to determine how each category performed in their cross-border assignments and to examine the conclusions from such a study.

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