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Specification of the Content Domain of the Intercultural Effectiveness Scale

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1. Intercultural effectiveness -- measurement. 2. Intercultural interaction. 3. Global leadership. 4. Expatriate adjustment and performance.

SPECIFICATION OF THE CONTENT DOMAIN AND RELIABILITY AND VALIDITY OF THE INTERCULTURAL EFFECTIVENESS SCALE (IES)

The 21st century is one of unremitting globalization. The bumper sticker wisdom that implores, "think globally, act locally," has become a reality and a necessity for educators, businesspeople, politicians, scientists, journalists, entertainers, athletes, and inventors alike.

Globalization is an ever-increasing social complexity that arises from the ongoing integration of cultural, technological, political, social, and business processes that results in a teeming, unpredictable, ambiguous, ever-changing context that must be squarely faced by everyone—but especially educators and businesspeople (Lane, Maznevski, & Mendenhall, 2004).

For example, globalization has caused educators to consider how to develop in students of all ages a better understanding of the world and its various cultures, and the need to develop competencies within their students that will allow them to live and thrive in a complex, ever-changing, globalized environment. Similarly, globalization has caused many CEOs to aggressively reposition their companies to deal with the unparalleled cross-border trade and investment, continual and rapid change in technological advances, ongoing shifts in global products and consumers, higher global standards in production and quality, and the inherent unpredictability in markets that characterize the complexity we call "globalization."

"How do we develop people who can thrive in the context of globalization?" First, it is necessary to understand and delineate the competencies associated with thriving in global contexts. What competencies do people possess who exhibit success in living and working in cross-culturally complex situations? And, what clues can these "global leaders" give us in terms of educating and developing people who can be successful in the age of globalization?

Since the early 1990s, an increasing number of scholars have been studying effective global leaders and attempting to delineate the competencies that are critical to their success. Reviews of this literature (Bird & Osland, 2004; Jokinen, 2005; Mendenhall, 2001; Mendenhall & Osland, 2002; Osland, 2008; Osland, Taylor, & Mendenhall, in press) find that social scientists have delineated over fifty competencies that influence global leadership effectiveness; however, many of these competencies overlap conceptually and are often separated only by semantic differences in the labels given them by researchers (Jokinen, 2005; Osland, 2008). The reviews also indicate clearly that global leadership is a multi-dimensional construct.

After analyzing the findings of the above reviews, we found that the framework developed by Mendenhall and Osland (2002) to categorize the numerous competencies found within the global leadership literature continues to be relevant to current research in the field, and elegantly conceptually organizes the numerous global leadership competencies into six core dimensions of competencies. They labeled these six dimensions, respectively: *cross-cultural relationship skills, traits and values, cognitive orientation, global business expertise, global organizing expertise*, and *visioning*

When these six dimensions of global leadership competencies were compared to the literature of expatriate effectiveness, it was found that there was a significant overlap between three of the competency dimensions of global leadership (*cross-cultural relationship skills, traits and values, cognitive orientation*) and the competencies that are important to living and working in a foreign country as an expatriate (Jokinen, 2005;

Mendenhall, 2001; Mendenhall & Osland, 2002; Osland, Bird, Mendenhall, & Osland, 2006; Osland, 2008).

The six competency dimensions can be conceptually divided between those that involve competencies directly related to intercultural interaction at the person and small group level, *cross-cultural relationships, cognitive orientation, traits and values* (which are critical to expatriate effectiveness), and those that involve the mastery of more macro, global business knowledge and skills (*global business expertise, global organizing expertise, visioning*).

Intercultural Competencies	***Global Business Competencies***
(person/small group level skills)	***(macro skill level)***
Cross-Cultural Relationships	Global Business Expertise
Cognitive Orientation	Global Organizing Expertise
Traits and Values	Visioning

AN OVERVIEW OF THE INTERCULTURAL COMPETENCIES DIMENSIONS IN THE GLOBAL LEADERSHIP AND EXPATRIATION LITERATURES

We will now present an overview of the major competencies that exist in the three domains of intercultural competencies above (*cross-cultural relationships, cognitive orientation, and traits and values*) from both the expatriate and global leadership research literature.

To explore the evolution of knowledge in the field of expatriation, we analyzed the reviews of the empirical expatriate literature since 1984 (Arthur & Bennett, 1995; Bhaskar-Shrinivas, Harrison, Shaffer, & Luk, 2005; Dinges & Baldwin, 1996; Gersten, 1990; Harrison, Shaffer, & Bhaskar-Shrinivas, 2004; Hechanova, Beehr, & Christiansen, 2003; Jordan & Cartwright, 1998; Kealey, 1996; Mendenhall, Kühlmann, Stahl, & Osland, 2002; Mendenhall & Oddou, 1985; Mol, Born, Willemsen, & Van der Molen, 2005; Oddou & Mendenhall, 1984; Ones & Viswesvaran, 1997; Ronen, 1989; Stahl, 2001; Thomas, 1998; Thomas & Lazarova, 2006) to evaluate their assessment of the state of the field.

Additionally, due to the fact that the expatriate research literature is spread across various disciplines, thus making it difficult for reviewers to comprehensively cover all extant empirical studies, we have included in the paper empirical studies that were not included in the aforementioned reviews or that were published after the appearance of these reviews. To assess the empirical literature of the global leadership field, we reviewed the following reviews of that literature (Jokinen, 2005; Mendenhall, 2001; Mendenhall & Osland, 2002; Osland, 2008; Osland, et. al., in press).

EXPATRIATE ADJUSTMENT COMPETENCIES

The ability to adjust to the work, social, and general cultural dimensions of a new culture has been shown to influence subsequent productivity of the expatriate during his/her overseas assignment (Kraimer, Wayne, & Jaworski, 2001; Harrison & Shaffer, 2005). Successful expatriate adjustment predicts task completion and relationship building effectiveness during the overseas assignment (Harrison & Shaffer, 2005), thus an understanding of what competencies influence expatriate adjustment is critical to an understanding of enhancing individual performance in the global workplace.

We began our review of the expatriate literature with the review and categorization of competencies associated with expatriate adjustment conducted by Mendenhall & Oddou in 1985. Based upon their oft-cited review of the literature, Mendenhall & Oddou (1985) classified the numerous competencies that they found influenced expatriate adjustment into one of three categories: the *self-oriented dimension*, the *others-oriented dimension*, and the *perceptual dimension*. These three dimensions align conceptually with the three dimensions of intercultural competencies we have noted above; specifically, *others-oriented = cross-cultural relationships, perceptual dimension = cognitive orientation, self-oriented dimension = traits and values.*

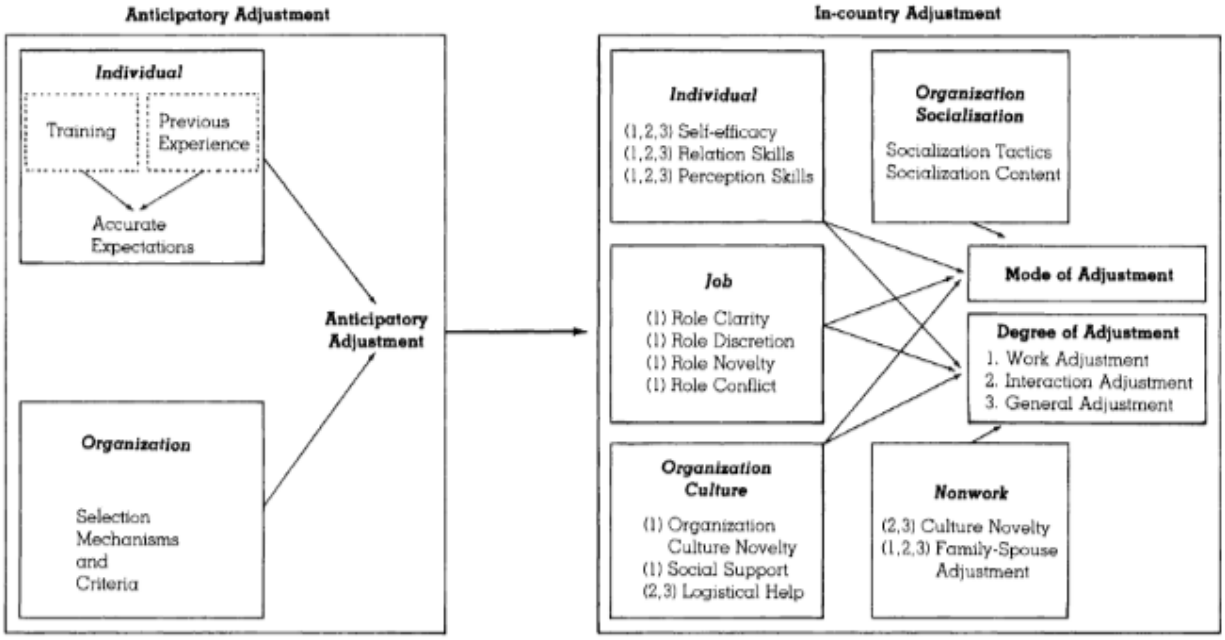
The *self-oriented* dimension includes "activities and attributes that serve to strengthen the expatriate's self-esteem, self-confidence, and mental hygiene" (1985: 40). The *others-oriented* dimension includes "activities and attributes that enhance the expatriate's ability to interact effectively with host-nationals" (1985: 41), while the *perceptual* dimension contains cognitive processes that facilitate an expatriate's "ability to understand why foreigners behave the way they do," thus enhancing their "ability to make correct attributions about the reasons or causes of host-nationals' behavior" (1985: 42).

This categorization has been a fruitful one over time in the literature (Thomas, 1998) and is, in part, the basis for the most rigorously tested, influential and robust model of expatriate adjustment in the field, *The International Adjustment Model (IA)*, which was developed by J. Stewart Black, Mark E. Mendenhall, and Gary R. Oddou in 1991 (for reviews and empirical validation of this model see: Bhaskar-Shrinivas, Harrison, Shaffer, & Luk, 2005; Hechanova, Beehr, & Christiansen, 2003; Mendenhall, Kühlmann, Stahl, & Osland, 2002; Shaffer, Harrison, & Gilley, 1999).

In their IA model, Black, Mendenhall, & Oddou. (1991) renamed Mendenhall and Oddou's (1985) earlier categories. *Self-orientation* was relabeled, *self-efficacy*, reflecting the degree to which an individual believes he or she has the ability to succeed in new tasks and settings (Bandura, 1977). The other two dimensions, *others-oriented* and *perceptual*, were respectively re-labeled as *relational* and *perceptual* in the IA model.

These three dimensions constituted the *Individual* dimension of Black, Mendenhall, & Oddou's 1991 model (see below), which focused on traits and competencies that had been shown in the literature to positively influence heightened levels of success in interacting with people from other cultures in overseas or cross-culturally significant settings. This *Individual* dimension constituted one of four dimensions of direct determinants of expatriate adjustment (the others were labeled: *job*, *organization culture*, *organization socialization*, and *nonwork*) in the IA model.)

Framework of International Adjustment[a]



[a] Numbers in parentheses indicate the numbered facet(s) of adjustment to which the specific variable is expected to relate.

A comprehensive meta-analysis of the IA model by Bhaskar-Shrinivas and colleagues (2005) of over 50 determinants of expatriate adjustment using data from 8,474 expatriates in 66 studies emphasized the "centrality, criticality, and complexity of adjustment, strongly supporting Black, Mendenhall, and Oddou's (1991) model (p. 257)." They also concluded that the "meta-analytic findings attest to the importance of some individual factors--overall self-efficacy and relational skills -- in predicting expatriate adjustment. The variance explained by the latter exceeded that explained by other predictors by 30 percent (p. 272)." Thus, competencies associated with Mendenhall and Oddou's 1985's categorization were found to have a powerful influence on a person's ability to be successful in cross-cultural and global milieus.

To summarize, the research suggests that the content domain of global competencies can be usefully summarized using three broad facets or dimensions for individuals: the *cognitive/perceptual*, *other/relationship*, and *self/self-efficacy* domains (Bhaskar-Shrinivas, et. al., 2005; Mendenhall & Oddou, 1985; Black et. al., 1991; Thomas, 1998: 247).

The Kozai Group developed a comprehensive assessment of competencies associated with the Invidiual dimension of the IA Model, The Global Competencies Inventory (GCI). For more information about this inventory please visit our website at http://kozaigroup.com or contact us at: info@kozaigroup.com

The Intercultural Effectiveness Scale (IES) is a less complex version of the GCI, developed to address the need for an assessment tool that can be used in contexts such as those found in many educational settings, where economy and ease of administration are critical program elements.

The IES measures fewer competencies than the GCI, but focuses on those competencies that are foundational for intercultural effectiveness. The IES measures competencies associated with three critical factors of intercultural effectiveness: *Continuous Learning*, *Interpersonal Engagement*, and *Hardiness*.

These three factors will be reviewed below, along with each of the two competencies that are measured within each factor; a discussion of the empirical support for each compegtency from the extant literature is included as well.

The first dimension that will be reviewed is the *Continuous Learning* dimension.

CONTINUOUS LEARNING

Individuals' orientation toward the world of culture, and people from different cultures, influences their effectiveness in their cross-cultural social and business interactions. The *IES* dimension of *Continuous Learning* examines how people cognitively approach cultural differences. It assesses the degree to which individuals engage the world by continually seeking to understand themselves and also learning about the activities, behavior, and events that occur in the intercultural environment.

The dimension of *Continuous Learning* is assessed in the *IES* by measuring two important competencies: *Self-Awareness* and *Exploration*. These competencies influence intercultural success by acting as internal motivators to learn about why people in other cultures behave and think the way they do. People who consistently strive to learn new things about cultures and people are more successful at living and working effectively with people from other cultures than individuals who are comfortable and secure with what they already know.

Self-Awareness (SA) refers to the degree to which people are aware of: 1) their strengths and weaknesses in interpersonal skills, 2) their own philosophies and values, 3) how past experiences have helped shape them into who they are as a person, and 4) the impact their values and behavior have on relationships with others.

Self-awareness influences one's ability to continuously learn as well as *how* one learns. High scorers are extremely aware of their own values, strengths, limitations, behavioral tendencies, and how they impact and affect others; they constantly evaluate themselves and this process in their lives. Low scorers report little concern or interest in knowing more about themselves or how their behavioral tendencies affect other people, and are not very interested in trying to understand their experiences. High self-awareness provides a foundation for strategically acquiring new competencies and skills, whereas low self-awareness can promote self-deception and arrogance.

Jokinen (2005) categorized this competency as being one of the primary competencies that is fundamental to effectively work with people from other cultures. Similarly, Varner and Palmer (2005) argued that, "conscious cultural self-knowledge is a crucial variable in adapting to other cultures (p. 1)."

Goldsmith, Greenberg, Robertson, & Hu-Chan (2003) included self-awareness as an important competency in the *personal mastery* component of their global leadership model. One of the important benefits, according to Goldsmith, et. al, (2003) regarding this competency is that it allows one to strategically involve others in one's work to complement one's personal weaknesses. Wills and Barnham (1994) found that emotional self-awareness was an important predictor of intercultural effectiveness, and Chen (1987) found that it was related to intercultural communication competence. Similarly, Bird and Osland (2004) concluded that one of the byproducts of the competency of self-awareness, a sense of humility, is an important

competency for successful intercultural interaction. These findings are in harmony with the research literature in domestic management where self-awareness has been found to be one of the crucial competencies possessed by effective managers (Whetten & Cameron, 2005).

Exploration (EX) reflects openness towards and an active pursuit of understanding ideas, values, norms, situations, and behaviors that are new and different. It involves the willingness to seek to understand the underlying reasons for cultural differences and to avoid stereotyping people from other cultures. It also includes one's capacity to actively take advantage of opportunities for growth and learning. It reflects a fundamental inquisitiveness, curiosity, an inner desire to learn new things, and the ability to learn from mistakes and to make adjustments to one's personal strategies to ensure success in social and work settings.

Tucker, Bonial, and Lahti (2004: 230) conceptualized it as "the capability to accept new ideas and see more than one's own way of approaching and solving problems." It is akin to the Big Five dimension of *Intellectance* or *Openness to Experience,* which reflects the "breadth, depth, originality, and complexity of an individual's mental and experiential life (John & Srivastava, 1999, p. 121)." Shaffer, et. al. (2006) stated that individuals high in *Intellectance*, as well as exhibiting other tendencies, are "more curious and eager to learn" new information about others and themselves (p. 113.); in their research it predicted expatriate work adjustment, contextual performance, and task performance.

This competency also emerged in reviews of the global leadership literature (Bird & Osland, 2004; Jokinen, 2005; Mendenhall & Osland, 2002; Osland, 2008) and has also found support in work by Kealey and his associates (Hudson & Inkson, 2006; Kealey, 1989, 1994, 1996; Kealey & Ruben, 1983) and others in the expatriate literature (Arthur & Bennett, 1995, 1997; Black & Gregersen, 1991; Mol, et. al., 2005; Moro Bueno & Tubbs, 2004; Ronen, 1989; Sinangil & Ones, 1997; Kühlmann & Stahl, 1996, 1998; Oddou & Mendenhall, 1984).

Based upon interviews with 90 senior executives and 40 nominated global leaders in 50 companies located in Europe, North America, and Asia, Black, Morrison & Gregersen (1999) found that inquisitiveness was the most important global competency within the constellation of competencies identified in their study. Also, Black & Gregersen (1991) found that individuals who took the initiative to learn about the new culture to which they were assigned to live and work in had higher levels of intercultural adjustment than did expatriates who did not do take such initiative or who relied only on company-provided training. Kealey (1996; 87) cited this as a primary competency in his review, stating that:

> Being intrigued about different cultures and wanting to learn about them is associated with effective collaboration across cultures…this interest usually leads to a sincere desire to get to know the country, its people, and its traditions.

The extended effect of *Exploration* is that it often leads to a preparation and a motivation to exhibit or improve competencies associated with the *Interpersonal Engagement* dimension. The next section will review the *Interpersonal Engagement* dimension along with its two associated competencies, *Global Mindset* and *Relationship Interest*.

INTERPERSONAL ENGAGEMENT

In their review of the research, Mendenhall & Oddou (1985: 41) found that the ability to develop positive relationships with host-nationals "emerged as an important factor in successful overseas adjustment (Abe & Wiseman, 1983; Brein & David, 1971, 1973; Hammer, et. al., 1978; Harris, 1973; Hawes & Kealey, 1981; Ratiu, 1983), accounting for large portions of the variance in the factor analytic studies studying adjustment (Hammer, et. al., 1978; Harris, 1973)."
Strong relationships with people from the new culture also serve as sources of information to help one understand the new culture and social support. The development of positive relationships is a critical aspect of effective intercultural job performance (Harrison & Shaffer, 2005; Mol et. al., 2005). Developing positive relationships depends in large part on one's interest in learning about people from other cultures, their customs, values, etc. The more information that is known about them, the greater the common ground that can then become a more solid basis for an effective relationship. This factor is assessed in the IES using two scales, *Global Mindset* and *Relationship Interest*.

Global Mindset (GM) measures the degree to which one is interested in and seeks to actively learn about other cultures and the people that live in them. This learning can take place from such things as newspapers, the Internet, movies, foreign media outlets, course electives in school, or television documentaries. The degree to which one actively seeks these outlets, by one's own choice, to expand personal knowledge about people and their cultures, reflects the strength of one's global mindset. It provides the basis upon which one can interact more effectively with people from other cultures.

To be effective in a global or cross-cultural milieu, it is necessary to have a perspective of time and space that extends beyond one's local milieu (Adler & Bartholomew, 1992; Boyacigiller, et. al., 2004; Kedia & Mukherji, 1999; Flango & Brumbaugh, 1974; Goldberg, 1976). This is an important orientation for global leaders to possess (Boyacigiller, et. al., 2004; Levy, et. al., 2007), and emerged in reviews of the literature on effective global leadership competencies (Bird & Osland, 2004; Mendenhall & Osland, 2002; Osland, et. al., 2006; Osland, 2008).

Our conceptualization of global mindset reflects the notion of cosmopolitanism of Levy, et. al. (2007) who argue, after reviewing the literature in this area, that cosmopolitanism "represents a state of mind that is manifested as an orientation toward the outside, the Other…a willingness to explore and learn from alternative systems of meaning held by others (p. 240)." Similarly, in the expatriate and immigrant adjustment literature an interest in foreign cultures appears as a contributing variable to adaptation (Arthur & Bennett, 1995, 1997; Hudson & Inkson, 2006; Hull, 1978; Klineberg & Hull, 1979; Pruitt, 1978; Ronen, 1989; Ward & Searle, 1991; also see Ward, 1996).

Relationship Interest (RI) refers to the degree to which people have a desire and willingness to initiate and maintain relationships with people from other cultures. People high on this dimension work hard to develop relationships with others; Mendenhall & Oddou (1985) defined this competency as "the ability to develop long-lasting friendships with host nationals" (p. 41). Black et. al., (1999) describe it as the ability to "emotionally connect with others."

This relationship between relationship development and adjustment to foreign cultures has remained constant in the literature since the publication of Mendenhall & Oddou's 1985 review and categorization of the intercultural competencies that positively influence cross-cultural adjustment. In all of the reviews in both the

global leadership and expatriate adjustment literature that we reviewed, the ability to create and maintain relationships with individuals in cross-cultural/global settings was found to be a key competency domain (Arthur & Bennett, 1995; Bhaskar-Shrinivas, et. al, 2005; Dinges & Baldwin, 1996; Jordan & Cartwright, 1998; Harrison, et. al., 2004; Kealey, 1996; Mendenhall, et. al, 2002; Mendenhall & Oddou, 1985; Mol, et. al, 2005; Oddou & Mendenhall, 1984; Ones & Viswesvaran, 1997; Osland, 2008; Ronen, 1989; Stahl, 2001; Thomas, 1998; Thomas & Lazarova, 2006).

Reviews of the literature have also shown specifically that the development of relationships is critical to cross-cultural effectiveness and adjustment, though this dimension has been classified using different terminology, such as *people orientation* (Shaffer, et. al., 2006) *interaction management* (Ruben & Kealey, 1979), *relationship building* (Kealey, 1996), *outgoingness* or *extraversion* (Arthur & Bennett, 1995; Ronen, 1989), *relational abilities* (Jordan & Cartwright, 1998; Thomas, 1998), *sociability* and *interest in other people* (Kealey & Ruben, 1983; Stahl, 2001), *interpersonal skills* (Hechanova, et. al., 2003) and *intercultural competence* (Dinges & Baldwin, 1996). Global leadership literature reviews similarly note that this is an important competency for effective intercultural interaction (Jokinen, 2005; Mendenhall & Osland, 2002).

Empirical studies continue to sustain the role of relationship development, and its attendant skills such as communication competence, as being critical to expatriate adjustment and intercultural competence (Arthur & Bennett, 1997; Bikson, Treverton, Moini, & Lindstrom, 2003; Black & Gregersen, 1991; Cui & Awa, 1992; Cui & Van Den Berg, 1991; Hammer, 1987; Hechanova, et. al., 2003; Kühlmann & Stahl, 1996, 1998; Martin, 1987; Martin & Hammer, 1989; Shaffer, et. al., 2006; Sinangil & Ones, 1997; Sudweeks, Gudykunst, Ting-Toomey, & Nishida, 1990; Thomas, 1998; Torbiorn, 1982).

For example, Waxin (2004) found that "social orientation" had a significant overall effect on French, German, Korean, and Scandinavian expatriates' ability to adjust productively to interacting with Indians. Similarly, Tucker, Bonial, & Lathi (2004) found that the dimension in their model, *social interpersonal style,* which was made up of the variables of "interpersonal interest" and "social adaptability" was significantly related to intercultural adjustment in their sample of corporate expatriates.

Tsang (2001) argued that *extroversion*, which is positively related to *sociability* and *interpersonal involvement* would be positively related to general and interaction adjustment in his sample of expatriates. This hypothesis was supported in his findings, reinforcing similar findings from past studies (Parker & McEvoy, 1993; Searle & Ward, 1990; Ward & Kennedy, 1993). Social support, a variable in Tsang's 2001 that he defined as "help received from other people when encountering difficulties in coping with a new environment (p. 356)," is similar to the aspect of relationship development, and was also found to significantly influence general and interaction adjustment in his study (Tsang, 2001).

Mendenhall & Oddou (1985) noted that exercise of relationship development had the effect of establishing friendships with host nationals who then took on mentoring roles to the expatriate, guiding "the neophyte through the intricacies and complexity of the new organization or culture, protecting him/her against faux pas and helping him/her enact appropriate behaviors." (p. 41-42). Bhaskar-Shrinivas, et. al., (2005) found strong support for this competency in their meta-analytic review of the expatriate adjustment literature, where they found that the variance explained by [relational skills] exceeded that explained by other predictors by 30 percent." (p. 272).

In the next section, we will review the last major domain area, *Hardiness*, followed by a detailed look at its two competencies, *Positive Regard* and *Emotional Resilience*.

HARDINESS

To work effectively with those who are culturally different and adapt to the new cultural environment, it is crucial to be predisposed to be open to differences in a positive cognitive/emotional way, and avoid being judgmental. Having a positive regard for cultural differences and people who are culturally different increases the potential for developing positive relationships. It increases the desire to learn more and better understand the new culture. In sum, it helps to build cultural bridges rather than build walls between cultures. However, even if an individual reflects the orientation just discussed, he/she will always run into encounters and challenges in intercultural settings that will cause some frustration and stress. Not always knowing what to do are stressful experiences; as a result, the ability to withstand stress and remain calm is also a critical competency for long term intercultural success.

Activities and attributes that serve to strengthen self-esteem, self-confidence, and mental hygiene are therefore key to intercultural effectiveness (Mendenhall & Oddou,1985, pg. 40). We measure people's ability to effectively manage their emotions and stress, along with their ability to view other cultures and people from those cultures in positive ways and to be nonjudgmental about ideas and behaviors that are new within the factor of *Hardiness*. It is made up of two dimensions, *Positive Regard* and *Resilience*.

Positive Regard (PR) refers to the predisposition to view other cultures and people from those cultures from a positive perspective. This reflects a tendency to avoid negative stereotypes in favor of a more positive view of human nature. Higher scorers assume the best about people and are more accepting of different behaviors. They seldom resort to negative stereotypes about other cultures or people, but will tend to make positive assumptions instead. In turn, people from other cultures tend to respond positively toward them, which leads high scorers to have more successful intercultural encounters and experiences and thus their levels of stress and frustration are lower. Low scorers have a tendency to hold negative assumptions about other cultures, making them more vulnerable to focusing on negative aspects of their interactions people from other cultures. They are more likely to make sense of the world around them by negatively stereotyping people and the situations they encounter, and are less likely to give others the benefit of the doubt. As a result, this limits their ability to develop effective relationships with people from other cultures and thus increases their stress and frustration levels.

Osland (1995) found that expert interculturalists were able to maintain a paradox within themselves: simultaneously feeling both positive regard toward the host nationals yet at the same time being able to discern the faults or "dark side" of the local culture, so that they were "savvy" about the host nationals and their culture. Expatriates who were able to balance this paradox well were not taken advantage of by the people around them, but were instead accepted by them and were able to successfully work and live with them. She termed this the *Expatriate Marginality Paradox*, and noted that

> "The first truth in this paradox, positive regard, means "thinking well of the local culture." It has been identified as one of the competencies possessed by effective U.S. Information Agency officials working abroad (McClelland and Dailey 1973). Positive regard for one's employees has also been found to be a competency of successful managers in the United States (Boyatzis, 1982). The other side of this paradox, being savvy about being taken advantage of by members of the local cultures, is usually more apparent to expatriates living in countries whose cultural attitudes toward honesty and manipulation differ from such attitudes in the United States.

> Another factor that affects whether expatriates experience this paradox is their perceptual system. Some people are innately suspicious of ethnic groups they do not understand. For them, being wary about being taken advantage of may be rooted in ignorance or ethnocentrism rather than in experience. (Conversely, sometimes locals really are trying to exploit expatriates who are unwilling to see it.) The inability to perceive the positive regard/caution paradox may also indicate a lack of cultural understanding. (p. 110-111).

Black (1990) and Shaffer et. al. (2006) also referred to the obverse of this competency as *ethnocentrism*, "the propensity to view one's own cultural traditions and behaviors as right and those of others as wrong (p. 114)" and argued that this mindset interferes with making accurate perceptions in cross-cultural encounters. Shaffer et. al. (2006) found that *ethnocentrism* negatively predicted interaction adjustment and contextual performance, and strongly influenced withdrawal from assignment cognitions in their sample of expatriates.

This competency, though labeled by varying terms, appears both in the global leadership and in the expatriate literature as being related to intercultural effectiveness (Arthur & Bennett, 1995, 1997; Cui & Awa, 1992; Gersten, 1990; Ronen, 1989; Sinangil & Ones, 1997; Hudson & Inkson, 2006; Kühlmann & Stahl, 1996, 1998; McCall & Hollenbeck, 2002; Moro Bueno & Tubbs, 2004; Oddou & Mendenhall, 1984) and is also found.

Emotional Resilience (ER) refers to the extent to which a person has emotional strength and resilience to cope with challenging cross-cultural situations. Emotional resilience reflects the psychological hardiness that allows a global manager to carry on through difficult intercultural challenges. Individuals who can manage and control their emotions are also better equipped to deploy other global competencies than those who are low in emotional resilience.

This competency emerged in Mendenhall & Osland's 2002 review of the global leadership literature, and in Bird & Osland's 2004 review of global competencies. Emotional resilience is a common indicator of intercultural effectiveness in the expatriate literature as well (Arthur & Bennett, 1995, 1997; Caligiuri, 2000; Kealey, 1996; Ronen, 1989).

Emotional resilience is akin to the ability to carry on in the face of adversity, *perseverance*, which is described by Kealy (1996) in his review of the literature as being an important attribute of working in foreign cultures. He classifies it as being a key predictor of success in a cross-cultural/global work setting. Kelley and Meyers (1992) assert from their research that:

> The emotionally resilient person has the ability to deal with stress feelings in a constructive way and to "bounce back" fro them. Emotionally resilient people . . . have confidence in their ability to cope with ambiguity . . . and have a positive sense of humor and self-regard.

Various variables that conceptually related to the importance of *Resilience* in intercultural success include: *coping with stress* (Arthur & Bennett, 1995, 1997; Jordan & Cartwright, 1998; Kealey, 1996; Ones & Viswesvaran, 1997; Ronen, 1989; Thomas, 1998), *psychological hardiness* (Arthur & Bennett, 1995, 1997; Caligiuri, 2000; Kealey, 1996; Mendenhall, 2001; Osland & Mendenhall, 2002; Osland, 2008; Ronen, 1989), *self-confidence* (Arthur & Bennett, 1995, 1997; Bhaskar-Shrinivas, et. al., 2005; Goldsmith, et. al., 2003; Hechanova, et. al., 2003; Jordan & Cartwright, 1998; Kealey, 1996), and *optimism* (Arthur & Bennett, 1995, 1997; Caligiuri, 2004; Jokinen, 2005; Kealey, 1996; Kühlmann & Stahl, 1996, 1998; McCall & Hollenbeck, 2002; Ronen, 1989).

CONCLUSION

The body of theoretical and empirical research in global leadership competencies and development and in expatriate adjustment and performance provide strong support for the conceptual formulation of the three-factor framework as represented in the *Intercultural Effectiveness Scale (IES)*. Specifically, *Continuous Learning*, *Interpersonal Engagement* and *Hardiness* constitute three distinctive though related domains and each of these factors can be broken down into separate competencies, each of which captures an important aspect of overall intercultural competency. A short overview of the process used to develop the IES inventory and its scales is provided below.

DEVELOPMENT OF THE IES INVENTORY ITEMS AND SCALES

In developing the Intercultural Effectiveness Scale, the conceptual domain presented earlier in this technical repost was used to guide the writing of a large and content valid pool of self-report survey items. The goal at the early stage of item development was to generate a thorough set of items that would ensure a more than adequate coverage of the content domain across all of six facets of the intercultural competencies. In all, 115 self-report statements were written for the initial pool of items, all of which were written to allow for subject responses using a 5-point Likert format, ranging from 1="Strongly Disagree" 2="Disagree," 3="Neither Agree Nor Disagree," 4="Agree," to 5="Strongly Agree."

Once the initial pool of items was developed, an extensive pilot study was undertaken for the express purpose of collecting a data set sufficiently large to allow for stable psychometric analysis of the items and the attendant facet subscales. Subjects for the pilot study were recruited by the researchers from as many professional backgrounds, ethnic groups, and nationalities as possible. In the end, both randomly selected and convenience samples were used to recruit the pilot study subjects, with the express purpose of targeting a generalizable sample that would be as similar as possible in work, educational and demographic background as the eventual cross-cultural populations on whom the final validated version of the IES would be used. In the end, 2,308 subjects completed the pilot version of the IES, with the following self-report characteristics: age included 8% of subjects under age 20, 64% between 20 and 29 years, and 28% were age 30 years and older. In response to questions about "present work position," 2% of subjects self-identified as "top level executives," 12% as "middle management," 16% as "entry level or supervisory management," 38% as "hourly/non-supervisory," and 32% as "other" (including students). Fifty-seven percent of subjects self-identified as male, with the remaining 43% female. Although subjects indicated 69 different nationalities of origin, only 16 countries provided more than 10 unique subjects; when grouped by world regions, North America (i.e., Canada and the U.S.) provided 56% of subjects, Asian countries provided 26%, and Europe provided 11%, with the remaining 7% coming from countries across Latin America, Africa and the Middle East.

With a final usable sample size of 2,308 subjects, the pilot study provided more than the recommended minimum subject-to-item ratio of 5-to-1 in order to conduct stable psychometric analyses of Likert-scaled self-report surveys and questionnaires (Hair & Black, 1998; Nunnally & Bernstein, 1994). Standard survey construction procedures and techniques were used to reduce the initial pool of 115 items to the final set of 52 items for the present version of the IES. The overarching goal was to refine individual items and eliminate redundant or unnecessary items from the final version of the IES so as to obtain the most reliable yet parsimonious subscales across the six IES facets. The results of these scale refinement efforts are reported in the tables below, along with the coefficient alpha reliabilities for each given scale.

Table 1. Factor Analysis Item Loadings for the Two Continuous Learning Subscales (overall scale reliability = 0.85)

Self Awareness (reliability = 0.76)

SA01	0.633
SA02	0.627
SA03	0.605
SA04	0.552
SA05	0.583
SA06	0.549
SA07	0.525
SA08	0.510
SA09	0.505

Exploration (reliability = 0.82)

EX01		0.726
EX02		0.725
EX03		0.652
EX04		0.648
EX05		0.665
EX06		0.608
EX07		0.645
EX08		0.583
EX09		0.583
EX10		0.593

Table 2. Factor Analysis Item Loadings for the Two Interpersonal Engagement Subscales (overall scale reliability = 0.86)

Global Mindset (reliability = 0.84)

GM01	0.823
GM02	0.735
GM03	0.775
GM04	0.611
GM05	0.704
GM06	0.709
GM07	0.584

Relationship Interest (reliability = 0.80)

RI01		0.804
RI02		0.696
RI03		0.674
RI04		0.628
RI05		0.499
RI06		0.808
RI07		0.625
RI08		0.620

Table 3. Factor Analysis Item Loadings for the Two Hardiness Subscales (overall scale reliability = 0.84)

Positive Regard (reliability = 0.79)

PR01	0.656
PR02	0.670
PR03	0.625
PR04	0.604
PR05	0.496
PR06	0.521
PR07	0.455
PR08	0.489
PR09	0.488

Emotional Resilience (reliability = 0.81)

ER01		0.703
ER02		0.698
ER03		0.697
ER04		0.708
ER05		0.596
ER06		0.608
ER07		0.583
ER08		0.525
ER09		0.538

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