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Stuart C. Carr
Editor

The Psychology of Global Mobility

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The Psychology of Global Mobility

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Contents

1 Introduction: The Psychology of Global Mobility	1
Stuart C. Carr	
Part I Context	
2 Human Mobility in a Global Era	23
Adrian Furnham	
3 Mixed-Methods Approaches to Contextually Grounded Research in Settings of Armed Conflict and Natural Disaster . . .	47
Kenneth E. Miller	
4 Ethical Psychological Practice with Geographically Mobile Individuals and Groups	61
Graham R. Davidson	
Part II Motives	
5 Mobility and Personality	87
Irene Hanson Frieze and Man Yu Li	
6 Identity and Global Mobility	105
Phyllis Tharenou	
7 Global Mobility, Local Economy: It's Work Psychology, Stupid!	125
Stuart C. Carr	
8 The Psychology of Enforced Mobility	151
Wendy Ager and Alastair Ager	
Part III Adjustment	
9 Global Mobility and Cross-Cultural Training	173
Jan Selmer	
10 Mobility and Acculturation	193
John W. Berry	

11 Mobility and Inclusion 211
Douglas C. Maynard, Bernardo M. Ferdman,
and Tabitha R. Holmes

**12 New Settlement and Wellbeing in Oppressive Contexts:
A Liberation Psychology Approach 235**
Sonia Hernández-Plaza, Manuel García-Ramírez,
Carlos Camacho, and Virginia Paloma

Part IV Performance

13 Mobility and Careers 259
Kerr Inkson and Kaye Thorn

14 Global Mobility and Bias in the Workplace 279
Astrid Podsiadlowski and Colleen Ward

15 Technology, Mobility, and Poverty Reduction 301
Lori Foster Thompson and Stephen G. Atkins

Index 323

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Chapter 1

Introduction: The Psychology of Global Mobility

Stuart C. Carr

Quando andate a casa, conoscete che cosa lasciate, ma non che cosa troverete

(When you leave your home, you know what you leave behind, but not what you will find)

– Old Italian Proverb

Where today are the Pequot? Where are the Narragansett, the Mohican, the Pokanoket, and many other once powerful tribes of our people? They have vanished before the avarice and the oppression of the White Man, as snow before a summer sun. Will we let ourselves be destroyed in our turn without a struggle, give up our homes, our country bequeathed to us by the Great Spirit, the graves of our dead and everything that is dear to us? I know you will cry with me Never! Never!

– Shawnee chief, Tecumseh (1811).

Sleep Not Longer, O Choctaws and Chickasaws,
from a speech before the Joint Council of the Choctaw
and Chickasaw nations

Abstract Globalization has magnified the salience of global mobility, for travelers and new settlers, host communities, policy-makers and social scientists alike. This book is a response to that challenge. Its contributions by leading thinkers crystallize a new and emerging field. Collectively the contributions argue that the Psychology of Global Mobility, like global mobility itself, is a pressing concern for Human Development. The book offers a useful response to the United Nations' Human Development Report for 2009. This called for more multi-disciplinary approaches to understanding and enabling the human capabilities that both (i) drive and (ii) result from, global mobility. The book's chapters analyze the historical, methodological and ethical context for mobility; its motivational substrates in personality, gender identity, economy, and climate change like disasters natural and man-made;

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mediating roles for cross-cultural adjustment via training, acculturation, inclusion and wellbeing; and mobility's consequences for individual careers, equal opportunity, global connectivity via technology, and human poverty reduction. Human development, the book shows, is a dynamic product stemming significantly from motivation, adjustment and performance, occurring mutually between the more and less globally mobile.

Keywords Migration-development nexus · Human development · Psychology · Global mobility · Brain drain · Brain gain · Poverty reduction

Abbreviations

IOM	International Association for Migration
<i>n</i> Ach	Need for Achievement
HDR	Human Development Report
UNDP	United Nations Development Programme

Global mobility is etched in human behavior since humanity began. Many thousands of years ago, according to archaeology and genetic science, hominids walked out of Africa's Great Rift Valley, in East Africa. Some of them – a very small number perhaps – helped to populate the Earth as we know it today. Around a millennium ago flotillas of “waka hourua” (voyaging canoes) crossed huge tracts of Pacific expanse. Groups of people in those waka came from Hawaiki, in Eastern Polynesia (Howe, 2003). Some of them reached the most recent country to be settled by human beings, Aotearoa/New Zealand. After these early first settlements, history records successive waves of global mobility by imperial powers, caused by, causing, and continuing to cause incalculable hardships, brutalities, suffering and injustices to first peoples (Marsella & Ring, 2003). Marsella and Ring's (2003) review is a poignant reminder that global mobility is not just about history, biology, geography, anthropology, sociology, politics, or economics (Towner, 1999). It is also about human hopes and dreams, terrors and torments. Global mobility covers a full range of the human condition, from its most courageous and admirable to its most deprived and depraved. Global mobility is not just “about” human behavior, it *is* human behavior – warts and all.

Statistically, global mobility has been quickening toward present-day levels (Furnham, this volume). Presently, according to the International Association for Migration (IOM, 2009), the world has more than 214 million international new settlers,¹ double the number living or working abroad globally since 1965 (<http://www.iom.int/jahia/Jahia/about-migration/facts-and-figures/global-estimates-and-trends>). If new settlers were a country they would be the fifth

¹Outside of direct quotations and publication titles, throughout this book the term “new settler” is preferred over “immigrant,” “emigrant” and “migrant” – which carry unwanted associations with racism and biological migration not new settlement. “Emigration” and “immigration” are useful for distinguishing outward from inward new settlement processes (and vice-versa).

most populous country in the world, at around 3.1% of the world's population. Included are 16 million refugees worldwide, with a further 26 million displaced internally. Not included are the offspring of new settlers, e.g., an estimated 65 million African- and Hispanic-Americans in the United States (Marsella & Ring, 2003). Many more worldwide play hosts to mobile populations, whose mobility touches their lives irrevocably (Carr, 2004). That can happen even in temporary visits. According to the IOM (2009), there are more than 2.7 million students studying internationally, with more on international business and humanitarian assignments. Global mobility intersects with perhaps a billion international tourists annually, many on longer working holidays, or who end up settling (Frieze & Li, this volume; Inkson & Thorn, this volume). Overall it seems, global mobility is a far wider topic than even new settlement ("migration") itself, and has become more routine, mundane, accessible, and demanding of understanding.

A Human Dimension

Statistics are relatively cold. They do not convey much about human experiences in mobility. They are not designed to capture people's everyday motives, values, hopes, fears and active searches for pride in identity (McCubbin & Marsella, 2009). They do not capture the injustices and separations of detention centers for used and abused marginalized workers (Pilisuk & Rountree, 2008). They are too indirect to fully convey the terrible and ongoing "soul wounds" inflicted on Indigenous peoples and their sense of identity, by colonial expansion, materialism, greed and oppression (Rapadas, 2007). Psychological processes – like identification – are often relatively absent from policy debates on global mobility, which remain dominated by Economics. In the process perhaps, some pivotal and vital human experiences, salient values and life-outcomes are omitted from policy formulation and consideration. The human consequences from these oversights are poignantly captured in these words, which come directly from one highly-skilled "economic" new settler (for others, Fisher, 2009):

I have some questions for New Zealand's politicians and employers. Of the politicians I would ask, why are you increasing the flow of [skilled] immigrants into New Zealand when New Zealand has shown itself unable to utilize the [skilled] immigrants it already has? Of the employers I would ask, what is wrong with us? How can you tell from our applications that we are not up to working for you? What must we do to prove ourselves worthy? New Zealand's politicians and employers do not owe us a job. They do owe us an explanation (Chan, 2001, p. 15, parentheses added).

Explanations are also the stuff of theory. A relatively early psychology theorist about global mobility was David McClelland. Controlling for economic factors like disposable income, McClelland tentatively observed empirical links between air kilometers travelled per-capita, and need for achievement (*n* Ach), (1961 p. 316). McClelland's research was globally mobile in its own right. It surveyed and analyzed travel motives and mobility behavior across times and places like Ancient

Greece, Medieval Europe, and Elizabethan England. Although McClelland's view of achievement has been criticized for an inherent individualism (Carr, 2004), his analyses did link global mobility to a psychological attribute, a construct in the theory of human motivation. To that extent, his analyses are a reminder that mobility, and mobility processes and their outcomes, can be partly *explained* by motivation. Indeed a role for motives in general is not terribly surprising – “motivation” after all is literally about “being moved”.

Psychology in Global Mobility

Psychology is fundamental to all movement, including its more global varieties. A sketch of global mobility's study in Psychology might begin in the 1960s, when motives like *n* Ach were joined by emotive capabilities like weathering “culture shock” (Oberg, 1960). Early work on cross-cultural resilience was undertaken in a non-profit organization, the United States' Peace Corps (Guthrie & Zektick, 1967). Emerging by the early 1970s were disappointing predictions of actual staying-power in the field (Harris, 1973). Forecasts of adaptability in the field had been based on clinical assessments of personality. What followed was understandable, perhaps: A figure-ground reversal of emphasis from personal qualities to cross-cultural training, especially in cross-cultural simulators (Fiedler, Mitchell, & Triandis, 1971). Personality lost ground again to “acculturation styles,” which like training chimed with learning (Berry, 1976). During the 1980s, understanding about learning environments expanded significantly, including distance travelled as well as differences between cultures themselves (Furnham & Bochner, 1986). Cultural differences during this decade took center-stage, aided significantly by large-scale factor-analyses of cultural values by Geert Hofstede (1980) among others. In the 1990s those values-based taxonomies fed back into the 1970s/1980s literature on cross-cultural training (Bhawuk, 1998), to spawn new training programs for whole “families” of cultures with comparable values sets. The same decade also ushered in a renaissance for personality theory, with a “big five” set of character traits that inevitably rekindled the 1960s “personality” approach to global mobility.

Throughout the latter part of the last century, the study of global mobility was fuelled by rising levels of global mobility in general. The trends in these movements are reviewed in detail in the next chapter, on mobility psychology in a global era. They are undoubtedly why in the 2000s the person- and environment-centered approaches have become more integrated. Questions today are more likely to be framed interactively: Does environment “x” enable the expression of trait “y” into behavior “z” (Boneva & Frieze, 2001). Definitions of z have expanded from heavily psychological variables like “adjustment”, to include broader and more palpable issues, like reducing human poverty (Carr & Sloan, 2003) and developing people's careers (Inkson et al., 2007). Foci like this are the fabric of this book. Their contents have a fitness for purpose in the wider community, and for its communities of practice. The 2009 *Human Development Report* (HDR), for example, from the

United Nations Development Programme (UNDP), is the first of its kind to focus exclusively on *Human mobility and development* (UNDP, 2009).

A central observation in this HDR is that “Moving abroad not only involves substantial monetary costs for fees and travel. . . but may also mean living in a very different culture and leaving behind your network of friends and relations, which can impose a heavy *if unquantifiable* psychological burden” (UNDP, 2009, p. 10, emphasis added). This book agrees with the first part, and disagrees on the second. The italicized qualifier overlooks half a century of precisely assessment of psychological burdens – from Oberg (1960) onwards, above. What this reflects is that in the past, psychology has not always managed to connect with key global bodies like the United Nations (UN), with the policy-makers to whom they speak, and with the laudable goals that organizations like the UN work to meet (Berry et al., 2010). The contributions in this volume address that gap. As well, however, we can also use the person-situation emphases, taken in the past, to draw lessons for the future.

Person

Although McClelland (1961) was interested in personality traits, much of his analysis of *n* Ach’s roles in mobility focused on cultural groups. His indicators of achievement motivation were found in content analyses of achievement themes in cultural artefacts like folk tales and literature. Countries with higher rates of travel (and comparable economic means) tended to fly more air miles. McClelland also reviewed evidence from “preliterate tribes” in the modern world, suggesting that patterns in their movements too – presumably on foot – paralleled those made by air, by wealthier contemporaries. Qualifying that, and in an early allusion to the power of situations, he also noted that *n* Ach is not the sole cause of mobility – it combines with “various pressures at home to move” (1961, p. 317). Subsequent research in Hines (1973a) found that Greek new settlers to the USA and New Zealand brought with them *n* Ach levels that exceeded their hosts’, among whom those higher in *n* Ach also moved more between jobs intra-nationally (Hines, 1973b). Individual differences like these were tested in other settings. For example, in the Caribbean, Tidrick (1971) found students who (i) recommended taking a job overseas, not at home; and (ii) intended emigrating after school, had higher levels of *n* Ach than more sedentary peers. Latterly, *n* Ach (along with *n* Power and work centrality) has been linked to intended mobility from Eastern Europe (Boneva et al., 1998; Frieze et al., 2004; Frieze & Yi, this volume).

In the non-profit sector, Peace Corps workers were originally selected using clinical judgments about candidates’ emotional fitness for field assignments (Harris, 1972). Attrition rates (training + field termination combined) remained high (41–56% from 1965 to 1969). Psychological services to the Peace Corps were subsequently curtailed, with Harris arguing cogently (1973) for a more structured and evidence-based approach to selection. That would include structured job analysis, specification and evaluation, and validation against reliable performance criteria

(Carr, 2007). Two decades later a landmark paper achieved just that, showing that traits like sensitivity and self-centredness reliably measured did predict the performance of Canadian aid workers (technical advisors) in the field (Kealey, 1989). With the arrival of the big five (above), traits like Openness to new experience have been shown to out-predict completion and performance in business sojourns, compared to more populist, subjective preferences like Conscientiousness (Ones & Viswesvaran, 1999). Consistent with this and the Peace Corps experience, a recent study found that international volunteers working in the Pacific scored higher-than-average (using wider population norms) on Openness and Agreeableness (including tender-mindedness) but not on Conscientiousness or Neuroticism/emotional stability (Hudson & Inkson, 2006).

What lesson can be drawn from the person-centered research in the 1960s and 1990s onwards? The history of personality psychology in global mobility is clear: Research has identified some consequential individual differences in mobility *motivation*. Personal motives connect this field to part one of the HDR for 2009, which begins by highlighting a need to ask not only “why” people move, but also “who” they are:

If movement responds only to income differentials, it is hard to explain why many successful migrants choose to return to their country of origin after several years abroad. Furthermore, if migration were purely determined by wage differences, then we would expect to see large movements from poor to rich countries and very little movement among rich countries – but neither of these patterns holds in practice (2009, p. 13).

The contributions in this book discuss a range of motivational attributes, how they can be measured, and the consequences they can have for mobility behavior and outcomes.

Environment

After the loss of psychological services from the Peace Corps (in 1970), one concept that took an ascendant in mobility psychology was “Culture assimilators” (Fiedler et al., 1971). Based on critical incidents (mini-narratives of successful and unsuccessful performance), these were multiple-choice scenarios with feedback designed to hone situational judgments. The early assimilators were largely “culture-specific,” i.e., based on critical incidents inductively content analysed, and converted into scenarios and situational judgment tests, culture-by-culture. Much of the early work developing these “culture-specific” programs was conducted with sojourning teachers, and in the military (Fiedler et al., 1971). Culture-specific assimilators proved superior to chalk-and-talk (lecture) methods (O’Brien & Plooji, 1977), for example in cross-national assignments (Worchel & Mitchell, 1972) and intra-national assignments (Triandis, 1977). They could also reduce stereotyping, distancing and other forms of prejudice and discrimination (Weldon, Carlston, Rissman, Slobodin, & Triandis, 1975).

A further step in assimilator development was influenced by large-scale factor analytic studies of cultural differences in business organizations (Hofstede, 1980; Javidan & House, 2001) and educational institutions (e.g., Chinese Culture Connection, 1987; Schwartz, 1996). Researchers abstracted higher-order factors and built assimilators for whole *groups* of cultures that are “culture-general” (Brislin, Cushner, Cherrie, & Yong, 1986; Cushner & Brislin, 1996). Despite a risk of over-generalizing, a culture-general assimilator reportedly out-performed a more culture-specific counterpart aimed at inculcating cultural sensitivity and making accurate attributions about hosts’ behavior (Bhawuk, 1998). Another culture-general assimilator also reduced international exchange-students’ cultural misunderstandings, rates of changing host, and levels of intercultural adjustment (Cushner, 1989).

Adjustment became a major topic in its own right in psychology during the 1970s–1980s, under the rubric of “acculturation” (Berry, 1976, 1980). Acculturation “styles” reflect age-old dilemmas for traveller and host alike: Whether to stress or reduce identification with one’s cultural roots, and the new culture; giving four major styles (high-low, low-high, high-high, low-low). Although in principle the styles apply equally to newcomer and host alike, in practice much of the research emphasis – and the implied onus for making “adjustments” – fell in the past not on the majority but on mobile minorities (Bouris, Barette, El-Geledi, & Schmidt, 2009). Minority adjustment to cultures, such as culture shock, has been differentiated from more personal responses to mobility per se, like for example depression (Ward, 1996). Acculturation style may predict one, personality traits the other (Swagler & Jome, 2005). Styles predict behavior, for instance under-identification with culture of origin co-varies with substance use (Miller, Lerner, Schiamberg, & Anderson, 2003).

Important to acknowledge is the fact that “adjustment” has limits. A pertinent illustration is that deeper levels of culture “shock” (when one is “out” of adjustment) earlier in time can presage *more* effective accommodation in the same setting, at a later point in the time sequence (Kealey, 1989; Landis & Wasilewski, 1999; Oberg, 1960; Rudmin, 2009). Added to “time”-centered variables during the 1980s was a range of additional situational moderators and mediators of how people fare in their and with others’ mobility (Furnham & Bochner, 1986). In addition to acculturation styles and their role in training (Zakaria, 2000), useful predictors of resilience and performance included, for example, cultural distance, economic development level, political systems match, modelling with role play, hearing local reactions directly, and in-service/onsite training (Barnes, 1985; Stahl & Calgiuri, 2005).

The question “How movers fare” is central to the HDR for 2009, implying that the adjustment process has implications for social policy and human development (UNDP, 2009). A key historical lesson from studying situations in global mobility is that their psychological burden, and potential benefits, can be assessed, and carry validity. The assessments can make a difference in at least two major ways. Firstly they can help prospectively, by helping people to cope with mobility – either their own or that of others’ – via preparatory training. Secondly they can help retrospectively, by providing evidence-based socially responsive human services, which counteract the psychosocial costs of those who move and those they leave

behind. At a more macro-level too, processes of acculturation, with their stochastic outcomes, are logically central to debates on policy in immigration, e.g., favoring either metaphorical “melting pots” or “multiculturalism” (Moghaddam, 1988; Moghaddam & Solliday, 1991).

$$B = f(P, E)$$

The equation stands for B_{behavior} is a function of P_{erson} and $E_{\text{nvironment}}$ (Schneider, 1987). After an emphasis on “P” in the 1960s and 1990s, versus “E” in the 1970s–1980s, the 2000s have been marked by a return to a more balanced blend of P and E. In a sense, this shift was inevitable. Culture shock for example runs right through both person- and environment-focused approaches: *Individuals* differ in how much shock they experience when encountering novel cultural *environments*. Individual motives and environmental pressures co-habit the same perceptual field (Lewin, 1935). Policies and other structural variables (training is an example) have a life “outside” of perception (Mischel, 1973). Social and political structures influence behavior at the micro-level (Fawcett, 1985). These top-down processes are termed, from sociology, “agency-structure *interaction*.”

A most obvious feature of the environments encountered by persons during theirs and others’ mobility is *other people*, either at home in a community, or at work in an organization (Kealey, Protheroe, MacDonald, & Vulpe, 2005). Those “other people” have perceptual fields too; these and their matches (or no) with each other are core subject-matter in Social Perception. We know already for instance that cultures of enterprise can help to keep entrepreneurs at home (Cervantes & Guellec, 2002). Male mobility can empower women (Katseli & Xenogiani, 2006). Training “sojourners only” can frustrate hosts, who after all have to deal with cultural diversity just the same (Pastor, 1997). Work climates can help to defer decisions to return home versus remain abroad (Zweig, 1997). Evidently, therefore, social “perceptions matter – and these warrant careful investigation to help frame the discussion of policy” (UNDP, 2009, p. 70).

A Road Less Traveled

The psychology of global mobility is built on foundations in theory, methods and ethics. An opening section on *Context* outlines human mobility in a global era, including key statistics, global methods respecting local context, and making decisions ethically, in clients’ best interests. Layered on this foundation, the structure of the book is a journey, with a beginning, middle and end. At the outset are its *Motives*. They include traits, identity, especially gender, and incentives to become mobile, from monetary to changes in climate and other forms of disaster. In the middle is some *Adjustment*. Topics addressed in this section include cross-cultural training, acculturation, inclusion and wellbeing. At the end is a clutch of chapters on *Performance*. The inter-linked chapters in this section foreground mobility’s

role in transforming careers, acknowledging and overcoming job selection bias, and harnessing technological development for the greater good.

The contributions themselves concern psychological costs and benefits, in equal measure. Forced mobility for example is often traumatic, creating a need for better services to protect access, health and life itself (Ingleby, 2005; Apostolopoulos, 2007; Englund, 2002). Without addressing such issues, the benefits of mobility may be prevented from materializing (Katseli & Xenogiani, 2006). The psychology of mobility today captures and spans emigration, immigration, stepping-stone destinations, returns home; lifestyle retirement; international education, business sojourns, aid work, refugee-hood, and tourism (Society, 2008). The ethos of this book is that each of those experiences, and others, tells us something more about mobility as a whole, including its potential for human transformation (Marsella, 1998). In that spirit, the term “migration” as we have seen is far too narrow for the gamut of types, directions, durations and patterns of human movement generally (IOM, 2009). “Migration” implies an annual cycle, as a species, for a fixed duration, driven largely by biological necessity. Animals like birds instinctively migrate; individual people are more and less peripatetic, for widely varying durations, and never stop learning.

Mobility of course is not the only stimulus to social and individual change. Innovation often comes from within a setting; originates from somewhere; and can also complement development from inside. This book does not subscribe to the “diffusionist” view, that development is necessarily exogenous (Howe, 2003). In the same vein of course, progress does not come from inside one academic discipline, or profession. The field of mobility studies is inherently inter-disciplinary, and this book is aimed at an interdisciplinary audience, in professional practice, policy making, and higher education (Carr & MacLachlan, 2005). Of interest to all these groups are inter-disciplinary global concerns, like global inequity. The book thus highlights lower-income groups, many of them moving within and between lower-income settings. Yet it also looks closely at the highly skilled, including minorities that are comparatively privileged, at least in comparison to lower-income counterparts:

Their experience would reveal not just how far liberalization might go under ideal conditions, but also reveal, in sharp relief, what persisting limitations there might still be to a completely unfettered global economy of mobility. . . The lack of research on these migrants. . . leaves a clear opportunity for a new kind of integrated research agenda on global mobility (Favell, Feldblum, & Smith, 2006, p. 5).

Integration is about timing. Recent years have witnessed a phenomenal increase in efforts to understand global mobility. In that explosion of information, the diverse perspectives on global mobility have inevitably become scattered, for example across journals in psychology, community and business, which span personality, well-being and career (Carr, Inkson, & Thorn, 2005). Reflecting that dispersal, each of the chapters in this book has been written by an expert or experts in a specialized domain. This in itself implies some eclecticism. Yet the very idea of a journey above is a reminder that the division is artificial. Personality motivates mobility, which impacts on people’s wellbeing, and can transform a life’s career.

Beginning, middle, and end – the psychology of mobility is eclectic but cohesive. That cohesion is reflected in the chapters themselves, in their structure and content.

Structure and Content

Context

A key next chapter by Professor Adrian Furnham gives an overview of changes in global mobility during the past 100 years. Professor Furnham presents a range of people-movement statistics which show clearly how global mobility has accelerated – dramatically – across business, education and tourism. This quickening effect is a central feature of globalization, and the global era in which this book is written. Yet the changes have not fundamentally changed the psychology of mobility. Basic issues remain, and if anything are ever more salient in the global age. They include dealing with culture shock, mutual acculturation, wars, religious persecutions, and climate change. The refugee and the business expatriate, the international student and the tourist, the aid worker and the economic new settler: They often share issues and decisions that “come with the terrain” during global mobility, despite differences in levels of choice and compulsion (Horgan, 2000). Furnham’s conclusion is thus a cornerstone for the book: Mobility behavior may have become more complex, but that is no excuse for compartmentalization.

Perhaps the most challenging domains to practice a psychology of global mobility are in settings of armed conflict and natural disasters (Kapor-Stanulovic, 2003). When the stakeholders are children, safety is a double concern (Anarfi et al., 2005). Being sensitive to the perspective of stakeholder groups and individuals is the central focus in a chapter on methods of practice, by Professor Ken Miller from Harvard University. Miller advocates the fitness for purpose, in these settings, of “mixed methods.” Mixed methods blend quantitative and qualitative techniques, including for example everyday critical incidents (MacLachlan & McAuliffe, 2003). They are respectful of local perspective without excluding global relevance, a global-local “glocality” (Carr, 2004). Miller’s concluding point is that interest in mobility will continue to grow with growing changes, like global warming. Paradoxically, a global era is accentuating the need for context-sensitive, culturally safe and at the same time part-generalisable measures.

Safety and sensitivity are ethical concerns, and the next chapter introduces codes of ethics and their decision-making applicability in local contexts of mobility. Emeritus Professor Graham Davidson has extensive experience, for example advising the Psychological Society in Australia, about global mobility and immigration issues there (Davidson, Murray, Schweitzer, 2008). Cultural safety and cultural competence are core concerns for practitioners working with refugees (and other new settlers) worldwide. Davidson offers concrete examples of a range of recurring issues and dilemmas. A context-sensitive model focuses on prima facie duties to a primary client in a local context, for example keeping implicit and explicit promises.

Central is a need for sensitivity to context, whilst at the same time using some kind of standardized procedures – for example, *prima facie* duties. Like Miller’s mixed methods therefore, ethical practice with mobile populations is not simply global “or” local. It is characteristically “glocal”.

Motives

According to official human development policy, a *prima facie* requirement for rendering human services is alignment (www.aidharmonization.org/secondary-pages/Paris2005). Alignment entails respecting local motives and aspirations. A chapter by Professors Irene Frieze and Man Yu Li explores “what” motives often will one individual to leave rather than stay. The chapter brings the idea of an “over-seas type,” discussed in Kealey (1989, p. 421) into the global era (Tharenou, 2003). It incorporates a range of individual and group variables, from motivational traits like achievement, power, work centrality, affiliation, attachment-to-place, freedom, gender and adult vs. child status. These human factors interact dynamically with enabling versus frustrating environments, to co-determine mobility intentions and thereby behavior (P, E). The chapter concludes with a point that *matching* human social and organizational services to new settler motives, for example through vocational guidance, is crucial for human and community development.

Personality is part of identity, specifically individual identity. However people also identify socially, with groups and communities (Tajfel, 1978). Social identification with one’s cultural and national origins can boost self-esteem and ease intercultural adjustment (Nesdale, Rooney, & Smith, 1997). Conversely a weakened sense of identity, with home culture, etc., can mean greater readiness to move away, means, etc., permitting (Abrams, Hinkle, & Tomlins, 1997). In her chapter on social identity, Professor Phyllis Tharenou expands this idea of identity, to include societal culture, occupational group, career trajectory, family, and gender. These can rival the salience of identification with national entities (Massey & Akresh, 2006). A central example is identification with gender, and gender roles. Previous work shows how male mobility affects females who may remain at home (Katseli & Xenogiani, 2006). This chapter argues that gender roles are more directly relevant to global mobility itself. It illustrates for example how they may create differential pushes and pulls on mobility, and return mobility, e.g., during family crises. Balancing life, family, work, etc., can be more complex for women than for men. Hence gender and other forms of identity need to be taken seriously in any policy strategy to retain talent at home, and/or pull it back to a home economy.

Economy at home is fore-grounded in a chapter by Professor Stuart C. Carr. Overlooked in emerging and lower-income economies is the fact that (i) local professionals are remunerated poorly compared to expatriate colleagues in the same job, with similar qualifications, even though incentives to migrate might be raised “if one is poor among (relatively) rich” (Sotelo & Gimeno, 2003, p.55). If the local professional manages to leave, (ii) organizations in the new country protect their status quo with “defensive routines,” surreptitiously “screening out” well-qualified new settlers who happen to originate from lower-income economies (also, UNDP,

2009). Institutionalized xenophobia creates demand for training interventions by governments and enterprise development agencies (Lerner, Menahem, & Hisrich, 2005). Finally, (iii) the under-employment and subsequent “brain waste” in (ii) overlooks a range of competencies, apart from “brains,” that skilled new settlers bring with them, and develop along the way, from resilience to achievement orientation. Since the mid-1950s, there have been significant developments in our understanding of such competencies, including their likely impacts on work output (Maier, 1955 to Latham, 2007). Organizations are managerially and socially responsible for enabling both (a) abilities and (b) motives, which enable (a) to *keep* developing.

In a wider human development vein, there are some 14 million refugees outside their countries of citizenship, plus 26 million being displaced internally by conflict, trafficking or natural disasters (IOM, 2009). In their chapter on human services for mobile populations, Professors Wendy and Alistair Ager, from Columbia University, consider case examples of refugees from civil war and natural disasters, forcibly displaced either internally or internationally. Many of the participants are traumatized children, whose everyday needs range from the physiological through to community and family support systems, with specialized services for some. Most displaced people simply need to replace lost everyday human, social and cultural resources that most of us take for granted. This chapter presents a behavioral model for community services that rather uniquely in psychology has won support from government and non-government agencies. The model is both interdisciplinary and holistic, aligning and adjusting the human services *system* to fit the new settlers, not vice-versa.

Adjustment

Forced or not, training about a new or visiting culture can help adjustment processes. In his chapter on culture and training, Professor Jan Selmer draws on an extensive amount of experience with groups crossing Scandinavia and the People’s Republic of China. Selmer highlights not only the utility of cross-cultural training despite its relative neglect, but also some surprising findings. Age, for example, is venerated in many cultures, easing rather than exacerbating culture shock, and thereby collaboration in those cultural environments. To assess training needs, Selmer has each group both report their own values and predict the values of the other group. Predicted and actual values-profiles are then mutually exchanged, identifying for each group any discrepancies in their cross-cultural understanding of the other. Training is thus empirically aligned with local as well as international need. It also turns out that size (of the gap) matters, but it is not all that matters. Selmer has found that even *smaller* cultural distances – which commonsense may miss, or underrate for importance – trip people up badly (also, Carr, Chapter 7 this volume). The chapter concludes that cross-cultural training is needed by everyone.

“Acculturation” as a term can be traced to the nineteenth century (Powell, 1880). The most influential figure in its psychology is Berry (1976, 1980). His model

of acculturation “styles” arguably continues to dominate discussion in the field (Bouris, Barette, El-Geledi, & Schmidt, 2009; Chirkov, 2009; Rudmin, 2009). A central chapter in the book, by Berry, is critically reflective. It returns to a stress on mutual interactions between P and E. It undertakes a stochastic analysis of strategies and outcomes. It reviews new evidence from a major study of new settler youth and their interactions with local communities, integrating the data back into the model. Individuals and groups differ in their preferred acculturation styles, which have consequences depending on context. Central to the model is P-E *match*, between (i) guest or newcomer and (ii) host: Whilst maintaining a balance of both home and host cultural norms is often adaptive, there will always be exceptions. Separation for example is sometimes logical for guest workers, if host communities stubbornly exclude them. Like cross-cultural training therefore, adjustment is moderated by *cross-community fit*.

As the concept “fit” denotes, communities are organs of inclusion and exclusion (MacLachlan, 2005). Sustainable and just forms of adjustment thrive on the former not the latter (Maynard & Ferdman, 2008). In their chapter, Professors Maynard, Ferdman and Holmes distinguish between inclusion as action on the part of organizations and communities, versus inclusion as subjective experience for those globally mobile. Both P and E are integral to adjustment as a whole. Organizations are social entities, places of work where cross-community fit can be facilitated. A central point in the chapter (like its section) is that both sides can adjust, in this case being inclusive towards the other. The chapter concludes with a set of practical and policy recommendations for facilitating that process. They include for example the institution of “jigsaw classrooms,” which have facilitated positive interdependence – mutual inclusion – between otherwise conflicted groups and individuals.

Inclusion also links to wellbeing. A chapter by Professor Sonia Hernández-Plaza, Manuel García-Ramírez, Virginia Paloma and Carolos Camacho explores that possibility with Moroccan communities living in Spain. Focusing on middle-level networks, both formal at work and informal in the community, the chapter adopts a systems view of new settler wellbeing. It applies mixed methods (Miller, this volume) to explore different levels through which wellbeing can be improved. At a community level is inclusive access to housing, employment, and income. At a relational level are inclusive social relationships, a two-way street as we know. At an individual level, sense of control, self-determination and identity are necessary. Melding all three is liberation psychology. Processes like participation in organizations, and inclusion in labor unions and community associations, enable empowerment and increased wellbeing. New settlers are often already motivated to enjoy processes like these, and civil society generally (UNDP, 2009, p. 61).

Performance

Wellbeing is not the only outcome of empowerment. A theme of changing power relations at work is central to the chapter by Professors Inkson and Thorn. Their central point is that mobility of any sort, domestic or international, can enhance

human capital like resilience, flexibility and competency. In a knowledge economy, it is “not the hive that makes the bees, but the bees the hive.” Agency rests with the workers, not the organization. The honey they cultivate as they move is knowledge. “Cultures of migration” (UNDP, 2009, p. 80), such as one finds in New Zealand, can bring returns to an apiary: Up until recently, the literature on careers was focused on crossing boundaries between organizations, not countries. This chapter contends that knowledge economies rely on mobility behaviour. It brings Career theory to the policy table, articulating its role in the policy-makers’ “migration-development nexus.”

Paradoxically enough, “global” mobility is not as boundary-less as its more localized counterpart, job turnover. One of the primary risks in global mobility is discrimination at work (Dietz, 2010). The chapter by Professors Astrid Podsiadlowski and Colleen Ward parses bias into job-related stages: Pre-screening, recruitment, selection, and appraisal. Several reasons for bias are implicated. Cross-cutting the stages, those reasons hinge on deep-seated and possibly often unconscious preferences: for Similarity; for in-group over out-group, especially in times of recession; and for maintaining social dominance, especially perhaps over out-groups from lower-income settings. Bias can be counteracted more effectively than at present, for example by raising awareness, by leadership that models diversity tolerance, by designing diversity into selection panels themselves, and by setting super-ordinate goals that stress inter-dependence on each other, for workplace innovation.

A complementary solution is explored in the final chapter of the book, on the mobility of knowledge. Professors Lori F. Thompson and Stephen G. Atkins turn the mobility question on its proverbial head. They ask if technology can replace mobility, circumventing barriers to mobility by cutting out physical mobility altogether. In many lower-income countries, physical mobility across borders is blocked. But connectivity is growing, as access to connective technology inexorably spreads, to counteract the twin tyrannies distance and poverty. Hand-held global positioning devices and text messaging are helping farmers choose the best land to cultivate. Online volunteering is on the rise. A project called “Smart Aid” turns brain waste (above) into gain: Skilled but under-employed new settlers from lower-income countries advise development projects “back home.” In the process their own career capital remains in credit, and even accumulates “interest.” Applied psychologists are helping with team designs that replace costly expatriate aid and dual salary systems, and the brain drain they sometimes fuel (Carr, Chapter 7 this volume). The central point of the chapter is thus that a psychology of information mobility helps empower human development.

Human Development: $D=f(M,A,P)^2$

Opportunities to express traits are social influences that interact with the traits themselves, from achievement motives, career identity and gender role, to equity sensitivity and needs for daily routine. Cultural training helps people to exchange

their perspectives with each other, and to close any gaps in mutual misunderstanding. Acculturation is a two-way street, entailing mutual inclusion and reciprocal wellbeing. Careers too are often bounded not boundary-less, with the resulting brain waste happening not just because of macro-policy, but because of everyday localized bias, for example in business organizations. Technology can broach and circumvent some of those boundaries and barriers, by redefining mobility to include not just physical movements of bodies, but also the flow of information between people *despite* distance. Development is a product of motivation, adjustment and performance, occurring mutually between the more and less mobile: $D_{\text{development}} = \frac{\text{Mobility}}{f(\text{Motives}, \text{Adjustment}, \text{Performance})^2}$.

As an example of how this process could possibly work, people who are relatively high in social or individual enterprise might move to a comparatively enterprising environment. Their new environment is by definition already relatively characterized by mutual accommodation. That property enables more culturing of enterprise to follow from new additions of like-minded groups to the host community. One group's P becomes the other group's E. This idea considers "human development" to be the sum total of need fulfilment, mutual tolerance and expanded capabilities. The use of a product term signifies that a "zero" from either party can block development altogether. Development can be measured using cross-level indicators already in the HDR. These range for example from life expectancy and GDP, to health and wellbeing.

Human development today has been helped tremendously by developments in technology (Marsella, 1998). The technology behind mobility is new and still evolving, but what about human psychology itself? People's motives and customs change more slowly than technology does, possibly by a very long way (Moghaddam, 1996). Moghaddam, Marsella and Furnham (this volume) each suggest that human dilemmas themselves are time-less. Adventure is still a human motive, whether we call it "achievement," sensation-seeking, or whatever. People still move for power – some of them at least. Cultural differences retain their power to be life-affirming and humbling at different times, and to challenge one's sense of identity, social equity, and inclusion. Conflicts and displacements, sadly for human suffering, continue. Majorities stay, minorities move away; an ancient pattern. Plus ça change. Yet climate change will force the issues inherent in global mobility – like never before (Werz & Manlove, 2009). That is where this book comes in. Its contributions are new, their outlook distinctive. They offer fresh vantage points on an ancient but paradoxically more-than-ever future vista.

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Part I
Context

Chapter 2

Human Mobility in a Global Era

Adrian Furnham

Abstract This chapter looks at why, when, who and where people move from one geographic region to another and the problems they have in adjustment. Asylum seekers, business people, students, volunteers, missionaries and new settlers become permanent or temporary sojourning expatriates and face particular problems. The chapter attempts to define the concept of “culture shock” and considers how it is measured. One of the more interesting ideas that emerge from this literature is the U and W curve hypothesis, which looks at a new settler’s adaptation over time. Whilst there is a considerable literature on foreign students, the chapter also looks at business people moving and working abroad. The costs of sending people abroad for a working sojourn can be very high and organizations are eager to ensure that their staff adapt and function well. Hence their attempts to select and support those who themselves choose and the organization chooses to send abroad. As a result there is a growing literature on the individual and social factors that seem to best predict successful adaptation while working abroad. The chapter also briefly considers the literature on cultural differences, which seeks to categorise countries on a limited number of psychological concepts (power-distance, uncertainty avoidance), so providing a “behavioural map” of the world that is useful in making predictions in how people may experience misunderstandings in travelling from one country to another. The final part of the chapter discusses theoretical models or frameworks that attempt to explain the nature of adaptation and culture shock, specifically how, when and why some individuals and groups appear to adapt less or more effectively and quickly. It also considers the theory behind and the efficacy of various methods that have been proposed to reduce stress among culture travellers.

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This chapter draws heavily on my others writings in this area. In doing so I must acknowledge my debt to Stephen Bochner, Colleen Ward and Michael Bond, who have a great depth of knowledge in this area.

Keywords Migration · New settlement · Mobility · Adjustment (culture shock)

Abbreviations

CDI Culture Difference Index

CSQ Culture Shock Questionnaire

The movement of human beings within and between countries is at an all-time high. Some countries have their natural population annually doubled or trebled by tourists. In others, particularly gulf countries, “foreign workers” make up three-quarters of the semi-permanent populations. Many universities have as many as a third of the students being classified as “foreign students”. In large developed-world cities there will be whole communities of foreign national groups with specialist shops, places of worship, community gathering spaces, and even radio stations and newspapers in their own language. The cost of travel, international conflict and the change in new settlement policies, particularly in the developed and “ageing West,” has seen dramatic changes in the new settler make-up of societies, particularly in Europe.

People move for many reasons: To trade and to conquer, to proselytize, and for leisure. Some move *away from* people and places, in the sense that many are escaping difficult conditions in their homeland, while others are *attracted to* particular places. They move away from drought or disease, famine or flood. They could be persecuted for their political or religious beliefs or activities. They may feel they have to become asylum seekers, or political refugees. Others are more simply economic new settlers, who move to have a better life. Others move because of education or employment opportunities. They are drawn by superior, world class, well-equipped educational institutions, or well-paid jobs that enhance their skills and experience. They may plan to go for a specific time-bound sojourn, but end up staying permanently. Hence there is a whole raft of *pull and push* factors involved in the difficult and complex decision to emigrate, or even to experience an extended sojourn.

In increasing numbers, business people travel long distances for meetings, seminars, sales meetings, etc. Some think nothing of traveling internationally more than once in a month. Many visit a dozen or more countries a year on a regular basis. The world has shrunk dramatically. Travel for many is cheap and easy, though the latter is changing as a function of the growth in international terrorism, climate change, and economic crisis. Yet the possibility of travel has never been easier. Once either a privilege of the very rich, or else only available to those with state or church support, people now move between continents and hemispheres, with much greater ease and in much greater numbers.

People thus move as tourists and adventure seekers; working business people and diplomats; soldiers and missionaries; refugees and new settlers. Some have considerable say in when, where and why they go, others are sent. Some have considerable support (emotional, financial, informational, social, technical), others very little. Some yearn to return home, others rejoice in their escape, which they try to make permanent (Furnham & Bochner, 1986).

This chapter will explore the psychology of international movement, new settlement and mobility. It attempts to review the psychological and psychiatric literature that seeks to understand the adaptation process of these different groups to the differing social, economic and political conditions in which they find themselves.

It is difficult to get accurate and up-to-date figures; the following, however, are simple examples of the size of mobility issues in this Millennium:

- A. *Students*: There are over half a million “international” students at American Universities. The University of Southern California alone has nearly 7,000 foreign students; the top three places of origin are India, China, and Korea. In Great Britain, there are nearly 2.4 million people in higher education. Around 10% come from EU countries alone. Some estimates suggest as many as five million – mostly young – people move from a country of origin to another country for study.
- B. *Asylum seekers*: Another, less happy, statistic is the number of asylum seekers. In Great Britain nearly 25,000 people applied for asylum in 2007. This reflects many things, including the instability of many countries in the world. Some countries have been a favoured destination of those in peril.
- C. *New settlers*: Without a doubt the greatest movement is of new settlers, and this has been particularly the case for the last 50 years. Most of the bigger European countries have around 10% of other populations as new settlers, with about 80% of them being working-age. Many tend to stay in capital cities. Thus in Britain over 40% of all new settlers live in London. Some statistics are surprising. For instance, of those in work, new settlers of both sexes in Britain earn more than UK-born people. They also tend to do better in university exams. A quarter of births in Britain in 2008 were to women not born in this country.

The mass movement of people changes as a function of social, political, and economic conditions. But never in history have so many people moved from place to place in search of education, sanctuary and work, as well as a better and healthier lifestyle. Thus we have health/safety new settlers and economic new settlers: those who move because they fear for their lives, and those whose jobs demand that they traverse the globe on a regular basis.

One question is the costs and benefits of these great waves of emigrating. It is increasingly common for people from all backgrounds to work abroad for a period. They may be relatively unskilled people moving from regions of economic decline to those with more booming economies. They may be young people simply out to see the world, or they may be specialists and managers specially selected by their companies to take a particular skill abroad. Equally, improved communications means a great increase in short overseas business trips for executives (Westman & Etzioni, 2002). The cost of travel and ease of new settlement has meant a large increase in the number of these people working abroad; hence there is great interest in cross-cultural psychology, particularly national and cultural differences in

organization behaviour, like styles of leadership, negotiation, motivation, and reward allocation (Smith & Bond, 1998).

It is becoming more and more frequent, particularly for people in developed countries, to move from job to job, and/or to be geographically transferred in the course of their working lives. Business movement is related to the process of internationalization by large employers as they evolve their corporate business structures. Indeed, some businesses, for a variety of reasons, have an active (and expensive) policy of regular job transferal; while for some occupations (e.g., traveling salesperson, diplomat), the job almost by definition involves travel.

It is not until comparatively recently that social scientists have begun to consider some of the psychological consequences of business transfer. What businesses and development agencies want to know as a matter of urgency and priority is: *What are the best predictors of work efficacy while abroad?*

In their review of the expatriation literature, Hilltop and Janssen (1995) list what they argue are the known facts about expatriation. These include:

1. The demand for expatriates is increasing.
2. Expatriates are expensive to employ.
3. International assignments present expatriates, management, and their families with a variety of difficulties and challenges.
4. The failure rate of expatriate managers is high.
5. Premature repatriation is costly both to the manager and the company.
6. Personal characteristics associated with successful expatriation include technical ability, stress tolerance, flexibility, communication skills and cultural empathy.
7. The adaptability of the spouse is a crucial factor in a manager's adaptation.
8. The subsidiary – parent company relations are an important factor in expatriate adaptation.
9. Selection, training and support during the assignment are crucial.
10. Employee participation: "How companies are dealing with repatriation problems is perhaps not the most important question. The key issue is to involve the expatriate in determining what position will be most suited to his/her needs after the international assignment." (p. 365).

Few would disagree with these points, though it must be acknowledged that they are, of necessity, generalizations. There are also some relatively self-evident facts relating to cross-cultural adaptation. The first is that a major predictor is cultural congruency, that is, when new settlers and natives come from cultures with similar values (Testa, 2009; see also Maynard et al., this volume). Waxin (2004) showed that culture of origin has a major moderator effect on predicting expatriate interaction adjustment. They also found that social support – particularly from partners – as well as intercultural training helped the adjustment process.

Most researchers point to the power of culture in shaping and constructing reality (Marsella, 2005). Ward (2008), in a paper subtitled “New perspectives on identity, acculturation and intercultural relations”, echoes this point when concluding thus:

Research on ethno-cultural identity conflict tells us that orientations to heritage and contact cultures can be conceptualised and measured in different ways; that for some individuals, traditional and new identities may be perceived as incompatible; that family, developmental and intergroup factors can reduce or enhance the perceived compatibility of identity orientations; and that the conflict engendered by irreconcilable identities has implications for psychological and socio-cultural adaptation. This line of investigation opens up a new avenue for understanding identity achievement and maintenance in migrants, and members of ethno-cultural minorities.

Studies on motivation for ethno-cultural continuity remind us that not only do group influences affect acculturating groups. . . The antecedents and consequences of the motivation for ethno-cultural continuity, as well as its variation across nations and ethnic groups, are all fertile ground for future research in an era of increasing mobility and globalization (p. 112).

In a descriptive study, and review that does not yet seem dated, Brewster (1991) attempted to answer some of the more obvious, but unanswered, questions about expatriates:

1. *Who are they?* Older, married expatriates tend to be senior managers, while younger single managers are more likely to be technical specialists. There seems to be a double wave – (1) in their 20s and 30s, and (2) in their 50s and 60s. Less than a fifth are women, and about the same total number go abroad of their own accord looking for work. Not unnaturally, a substantial number have some sort of links with foreign countries prior to their assignment (e.g., family). The typical length of each posting is 3–4 years.
2. *Why do they go?* Single men stress higher incomes, while women stress the importance of experiencing a different culture, lifestyle, and opportunity to travel. Married people seem particularly sensitive to the distinction. Overall, the job-sense of vocation, and the lure of financial rewards are consistently rated as the most important factors. At the beginning of careers, personal development and advancement are seen as important, but as careers advance through multiple overseas postings, “destination” ascends the ranking for motivation.
3. *Perception of contracts.* With the exception perhaps of international aid volunteers, expatriates are extremely expensive: well-paid, in first class accommodation, with additional perks. What these expatriates seem to value most, in rank order, are provision of medical care, continued pension rights, provision of accommodation, freight of possessions, return leave flights paid for, emergency return provided if necessary, and salary paid in hard currency.
4. *Preparation for the expatriate assignment.* Despite what is recommended, companies appear to offer little except informal briefings and language training, but rarely overlap on tour or formal training programmes. Because of cost, lack

of availability, or not realizing the need, surprisingly little training is actually offered to expatriates before they go (see Selmer, this volume).

5. *The experience of work.* Two factors appear to merit the most common problems: perceived attitudes to time (timekeeping and time frames), as well as perceived un-meritocratic behaviour (nepotism, etc.). Other factors frequently mentioned include language difficulties, different motivation factors, impingement of religion and ethics at work, frustration with fatalism, a low respect for life, problems with attitudes to the family, different approaches to handling emotional issues at work, different commitment to objectives, apparent lack of professionalism, and, more profoundly perhaps, the slow process of leaving the ground rules of the new culture. The five most helpful coping strategies for work are cultivating local activities, mixing with the locals, taking up a new hobby, involvement with the expatriate community, and gaining language fluency.

The “shrinking” of the world by “globalization” has led both academics and practitioners to try to define the characteristics of those who become successful global business leaders able to work successfully in every country. In a study of more than 200 global leaders, Caligiuri and Tarique (2008) found highly extraverted leaders with a greater number of high-contact, cross-cultural leadership experiences proved to be the best global leaders. They believe that an individual’s personality and early life experiences (coming from a diverse, new settler family) play a large part, and that those who had many different and intense personal, face-to-face high-contact cultural experiences do best when working abroad.

Elenkov and Manev (2008) have noted that social skills are important in the success of senior expatriate leaders. They refer to *cultural intelligence* as a blend of social and emotional intelligence, reflecting sensitivity to and ability to manage people’s beliefs, behaviours and motivation in culturally diverse settings. They also found that showing visionary leadership styles (modelling the way; inspiring a shared vision; challenging the process; enabling others to act and encouraging the heart) predicted leadership success. It could be argued, however, that this factor is predictive of leadership success in all cultures and settings.

This chapter will firstly categorize/classify the many different types of expatriates that there are. The motives for movement inevitably relate directly to the personal experience of change, hence the issue is of fundamental importance. Secondly, the concept of culture shock – a popular lay description of the experience of all sojourners – will be discussed from a psychological perspective. Adaptation to a new country, culture, and environment clearly goes through different phases. The U- and W-curve hypotheses for adaptation will thus be considered. Some of the more simple but important cultural differences that prove problematic for the expatriate are reviewed, including the important issue of selecting and preparing expatriates for their move. Finally, different methods for reducing expatriate stress will be discussed.

Types of Travelers

Various attempts have been made to classify or categorize travelers, using different dimensions. For instance, Bochner (1982) classified expatriates and sojourners according to their psychological response to the host culture. This divided people into four groups: “passing” (reject own culture, embrace second culture); “chauvinistic” (reject second culture, exaggerate own culture); “marginal” (vacillate between cultures) and “mediating” (synthesizing both cultures). Clearly, the model supports the mediating response as the most healthy and adaptive (Berry, this volume). This response is essentially the bi- or multicultural response, which allows the individual to accept and translate the values and behaviors of one culture into the other. It represents culture learning and integration.

This is clearly a useful way of distinguishing expatriates, but it tends to concentrate on reactions to new settlement. More fundamental perhaps are motives. Motives are complex, numerous, and not always explicit. Some have categorized them into *pull* and *push* motives – features of the second country or culture, such as the climate or a higher standard of living that pulls one to that culture. On the other hand certain factors, such as discrimination or political uncertainty, push one away from one’s country of origin. Certainly, it seems implicitly the case that “expats” who are pulled would adapt more readily than expats who are pushed. Furthermore, there is evidence that new settlers who are pulled are more likely to adapt to local conditions than new settlers who are pushed (Horgan, 2000); that is, “free-choice” new settlers seem more eager to assimilate than those who are pushed to leave their native country by various pressures.

Furnham and Bochner (1986) suggest various dimensions on which groups of expatriates could be classified. These include:

- *Geographical distance* – between “home” and second culture, implying various climate and cultural differences.
- *Amount of change required* – this is both qualitative and quantitative, and suggests behavioral plus cognitive aspects of adaptation.
- *Length of time spent* – this could be categorized into specific time categories, like 3 or 5-year periods.
- “*Voluntariness*” of the move – the idea that the move itself may not be voluntary, but may be the result of various constraints and prescriptions.

There are some useful dimensions or factors that may be used to distinguish one type of expatriate move from another. These include:

- *Distance* – how far a person is transferred
- *Country* – whether the move involves leaving one’s own country, continent, linguistic area, or not
- *Job* – whether the person is expected to do much the same or a different type of job, or at the same or at a different level

- *Social support* – whether the person moves alone, with others from the workplace, with or without family
- *Time* – how long the persons are likely to spend in this other place and when they can expect to return or move on to another posting
- *Returns* – benefits and costs of the move, including the possibility of being dismissed or demoted if not agreeing to the transfer
- *Volunteering* – to what extent the individuals believe that they had a choice in the move.

Typically there are three categories of travelers: *new settlers and refugees*, who often move permanently; *sojourners* like diplomats, missionaries, soldiers or students who go for a fixed period; and *tourists*, who spend relatively short periods abroad. These three groups tend to be studied respectively by psychiatrists, psychologists, and sociologists.

Many factors may be important for the adjustment of the expatriate. For instance, a 6-month sideways transfer, alone and to an unknown and distant country, is likely to have consequences quite different from a 2-year sojourn in another part of the same country, accompanied by one's spouse, family, and provided with generous financial and social support.

According to Torbiorn (1982), multinational companies have *three* basic motives in posting people to foreign countries: *the control function* (to ensure that operations in other countries are being carried out as planned and to secure staff loyalty); *the know-how function* (to provide technological and administrative services); and *the contact/coordination function* (to evaluate and transmit salient information between company operations). Thus, business expats have a difficult role in that they are required to act in accordance with the expectations of the parent company *and* also fulfil local expectations: the two often being incompatible. This can easily turn into role conflict. Problems with these professional roles include unclear, ambiguous or even incompatible expectations on the part of the parent company, communication difficulties, a clash between company and personal interests and values, uncertainty about the future, and problems with the adjustment of the spouse and family.

Black and Gregerson (1991) have also come up with a typology of expatriates in terms of how they see themselves, which may be a very good indicator of how they behave at work and adapt to the local setting. Four types may be described by looking at how they react on two dimensions: *Allegiance to the parent firm* and *Allegiance to the local operation*. If both allegiances are strong, they see themselves and react as *dual citizens*, equally committed to both; if their allegiance is low on both, they are likely to see themselves as *free agents*, with relatively little organizational commitment. If their commitment to the parent firm is high and the local operation (to which they have moved) is low, they have clearly *left their heart and their real commitment behind*. Finally, if they become highly committed to the local organization while losing their commitment and allegiance to the parent head office, they may be seen as "going native". All four reactions are fairly common (Berry, this volume).

When people go to work abroad for any length of time, they nearly always take partners and possibly family – even the extended family. Relatively little research

attention has been paid to the family aspect of the work sojourn, but it is clearly very important indeed. If the poor adaptation and unhappiness of the sojourning worker's partner and family increases rather than reduces his or her stress, it must be an extremely important factor in predicting their overall effectiveness. Many organizations are becoming aware of this, and when considering selecting people for overseas assignments are taking into consideration partner and family issues.

Culture Shock

The anthropologist Oberg (1960) was the first to have used the term. In a brief and largely anecdotal article he mentions at least six aspects of culture shock, which others have teased apart. These include:

- *Strain* because of the effort required to make necessary psychological adaptations
- *A sense of loss and feelings of deprivation* in regard to friends, status, profession, and possessions
- *Being rejected by/and or rejecting* members of the new culture
- *Confusion* in role, role expectations, values, feelings and self-identity
- *Surprise, anxiety, even disgust and indignation* after becoming aware of cultural differences
- *Feelings of impotence* because of not being able to cope with the new environment.

Papers on the meaning of culture shock still appear. Irwin (2007) sees it as an affective disturbance experienced by people when “two sets of realities and conceptualizations meet” (p. 1). It occurs when people no longer understand otherwise shared cultural symbols and social knowledge.

Most studies of culture shock have been descriptive, in that they have attempted to list the various difficulties that sojourners experience, and their typical reactions. Many studies are interested in what factors (like high levels of intercultural perceptiveness and sensitivity) lead to adaptation in long- and short-term stays abroad (Jackson, 2008). Less attention has been paid to explaining for whom the shock will be more or less intense (e.g., for the old, or the less educated); what determines which reaction a person is likely to experience; how long they remain in a period of shock, and how to prevent or overcome it. The literature suggests that all people – to some extent – will suffer culture shock, which is always thought of as being unpleasant, stressful, and disorienting. However, this assumption needs to be empirically supported, as some people need not experience *any* negative aspects of shock. Instead, they may *seek out* these experiences, for their own enjoyment.

Mumford (1998) attempted to develop and validate a simple, but useful, measure of culture shock as set out below. This helps to define the concept.

Culture shock questionnaire (CSQ)

A. "Core" culture shock items	B. Interpersonal stress items
1. Do you feel strain from the effort to adapt to a new culture? Most of the time Occasionally Not at all	1. Do you feel anxious or awkward when meeting local people? Most of the time Occasionally Not at all
2. Have you been missing your family and friends back home? Most of the time Occasionally Not at all	2. When talking to people, can you make sense of their gestures or facial expressions? Not at all Occasionally Most of the time
3. Do you feel generally accepted by the local people in the new culture? No Not sure Yes	3. Do you feel uncomfortable if people stare at you when you go out? Very uncomfortable Slightly uncomfortable Not at all
4. Do you ever wish to escape from your environment altogether? Most of the time Occasionally Not at all	4. When you go out shopping, do you feel as though people may be trying to cheat you? Most of the time Occasionally Not at all
5. Do you ever feel confused about your role or identity in the new culture? Most of the time Occasionally Not at all	-
6. Have you ever found things in your new environment shocking or disgusting? Many things A few things None	-
7. Do you ever feel helpless or powerless when trying to cope with the new culture? Most of the time Occasionally Not at all	Scoring: First response = 2 Second response = 1 Third response = 0 If combined 12-item version is used, it is recommended to alternate the items from Sections A and B (p. 154).

The questionnaire was validated on 380 British volunteer workers who had gone to 27 different countries. The Coefficient Alpha (internal reliability) for each part was not particularly impressive (0.75 and 0.52), although overall it was an acceptable 0.79. External criterion validity was established by using the CDI (Culture Difference Index) (Babiker, Cox, & Miller, 1980). It showed (as predicted) that the

greater the cultural difference between Britain and countries visited, the greater the culture shock. The CSQ appears to be a simple, albeit fake-able, instrument to get a “rough-and-ready” self-report with little difficulty.

Since Oberg (1960), it has been fashionable to describe the “disease” of culture shock in terms of several stages (Smalley, 1963). These attempts have all been descriptive and tend to overlap. Oberg (1960) listed four stages of shock:

1. *Honeymoon stage* – An initial reaction of enchantment, fascination, enthusiasm, admiration and cordial, friendly, superficial relationships with hosts.
2. *Crisis* – Initial differences in language, concepts, values, familiar signs and symbols lead to feelings of inadequacy, frustration, anxiety and anger.
3. *Recovery* – The crisis is resolved by several methods, such that the person ends up learning the language and culture of the host country.
4. *Adjustment* – The sojourner begins to work in and enjoy the new culture, although there may be occasional instances of anxiety and strain.

One of the more consequential of these stage-wise theories is the debate on the U- or W-curve. The idea of the U-curve has been attributed to Lysgaard (1955). He concluded that people go through three phases: initial adjustment, crisis, and regained adjustment. He implied that the period of adjustment took about 20 months, with some point between 6 and 18 months being the bottom of a “U”. If one traces the sojourner’s level of adjustment, adaptation and wellbeing over time, a U-shape occurs, such that satisfaction and wellbeing gradually decline but then increase again. The W-curve is an extension by Gullahorn and Gullahorn (1963). They found that once sojourners return to their home country, they often undergo a similar re-acculturation process, again in the shape of a U, hence the W (double U). Furnham and Bochner (1986) have pointed out various problems with this literature, notably the vagueness of the description and definition (When is a U not a U?).

In a comprehensive review of the U-curve literature, Church (1982) reports seven studies that found some evidence for the hypothesis, but a similar number that did not. He concluded that support for the U-curve hypothesis is weak, inconclusive, and over-generalized. For instance, not all sojourners start off in the phase of supposed adjustment, elation and optimism – some are unhappy, depressed and anxious right from the start (if not before). Secondly, some never become depressed or anxious, enjoying the experience and adjusting to the culture right from the start. Thirdly, where there are U-curves, they are of dramatically different shape – some are flat, others tall, and all are irregular. As Church (1982, p. 542) has noted, there are many problems with these simple descriptive theories:

Is the order of stages invariant? Must all stages be passed through or can some be skipped by some individuals? In order to classify individuals, key indicators of each stage are needed, indicators that may vary with the culture of origin or be indicative of more than one stage, reflecting superficial adjustment in an early stage but a true “coming to terms” with the new culture in a later stage.

The re-entry U-curve can be derived from the notion of contradictory role demands. In one study Gaw (2000) looked at reverse culture shock in American students returning home. Many felt alienated, lonely, depressed, and confused. Bochner, Lin, and McLeod (1980) have shown that returning expatriates anticipate that they will be subjected to contradictory social expectations. In particular, they think that there will be some ambivalence in the treatment they will receive from their professional, peer, and family groups. Again, the rate of resolving these role conflicts may vary with certain circumstances, and could account for the absence of a W-curve in some studies.

There is a limited literature on *repatriation* and the particular adjustment difficulties workers have when they “come home”. One recent study suggested nine possible factors that influence re-adjustment: duration of the expatriation; repatriates’ self-efficacy beliefs; homecoming work expectations; autonomy in the new workplace; promotion on return; being assigned a mentor; frequency of communication with the home office while being abroad; training after repatriation; and increase in social status after the return (Vidal, Valle, Aragon, & Brewster, 2007). They found that four factors predicted adjustment after 2 months (self-efficacy; autonomy; expectation accuracy; and social status), while two factors predicted adjustment at 9 months (self-efficacy and expectation accuracy). It is interesting to note that repatriation has not attracted nearly as much attention in the mobility literature as expatriation, despite it being clearly an important issue (Bossard & Peterson, 2005).

Furnham and Bochner (1986) have maintained that the advantage of the social psychological model of temporal adjustment is that it can predict and explain different “adjustment” profiles as a function of quite significant determinants. Thus, the successful culture-learner should exhibit a typical U-curve and, after re-entry, a W-curve. Experienced culture travelers should show a flat “curve” and unsuccessful ones a declining curve during sojourn, and a rising one after re-entry.

Although different writers have put emphasis on different aspects of culture shock, there is by and large agreement that exposure to new cultures is stressful. Fewer researchers have seen the positive side of culture shock, either for those individuals who revel in exciting and different environments, or for those whose initial discomfiture leads to personal growth. The quality and quantity of culture shock has been shown to be related to the amount of *difference* between the visitor’s (sojourner/manager) culture versus the culture of the country in which they are visiting or working. Those diversities comprise many cultural differences in social beliefs and behaviors. However, culture shock is thought of as a temporary manifestation of distress. Most researchers have focused on adaptations and adjustment, specifically their best predictors.

At the heart of the culture shock literature are attempts to provide theories or models for the process of cross-cultural adaptation. Sobre-Denton and Hart (2008) suggest that the literature is dominated by four models: the U-curve model; an anxiety/uncertainty model; a transition model; and a stress-adaptation-growth model. They note that each points to a different manner of approaching pre-departure training. They also favor the anxiety/uncertainty model, which emphasizes the

sojourner's feelings of lack of control and poor ability to predict behavior – leading to ambiguity and uncertainty anxiety.

Business Travelers and Business Support

Because of the cost of moving workers and their families to foreign countries to work for a specific purpose, this area has attracted considerable research. Mol, Born, Willensen, and Van der Molen (2005a), Mol, Born, and Van der Molen (2005b) suggest the best way to research the issue is to look at very specific job criteria (e.g., productivity, communication competence, effort, and initiative) and the skills, abilities and traits that predict them. Borrowing from others, they list “eight dimensions of adaptive performance”:

1. Handling emergencies or crisis situations
2. Handling work stress
3. Solving problems creatively
4. Dealing with uncertain and unpredictable work situations
5. Learning work tasks, technologies and procedures
6. Demonstrating interpersonal adaptability
7. Demonstrating cultural adaptability
8. Demonstrating physically-oriented adaptability.

They also suggest nine general competencies: (a) adaptation skills, (b) an attitude of modesty and respect, (c) an understanding of the concept of culture, (d) knowledge of the host country and culture, (e) relationship building, (f) self-knowledge, (g) intercultural communication, (h) organizational skills, and (i) personal and professional commitment. These make a useful checklist for selecting those for work abroad.

All people who work abroad become acutely aware of the power of national as well as corporate culture. Even those working in virtual teams begin to appreciate the importance of respect in handling diverse issues (Dekker, Rutter, & Van den Berg, 2008). The sort of issues that arise are different perspectives in hierarchy and inequality (power-distance); to what extent one needs laws and rules to reduce the discomfort of ambiguity (uncertainty avoidance); the relative importance of individuals over groups (individualism vs. collectivism); and the way gender is treated (femininity vs. masculinity) (Hofstede, 1980). Other issues concern long vs. short-term perspectives. Often, the more similar people are in their cultural values and background, the more they identify with the work group that they are in (Luijters, van der Zee, & Otten, 2008; see also, Maynard et al., this volume).

One crucial issue for all mobile workers wherever they go and whatever level they work at is being accepted by the workgroup. Joardar, Kostova and Ravlin (2007) showed various specific factors predicted the acceptance of a foreign newcomer into a work-group: socially attractive behavior (like confirming to group norms), and

seeking information about appropriate ways of behaving, as well as the newcomer's cultural intelligence (as defined by their prior cross-cultural experience and their social reputation of establishing a reputation with the hosts).

Studies on expatriate business men and women who have moved from one area or country to another have revealed evidence of unhappiness, distress, and poor adjustment. Of course, this is not always the case and, as research has shown, there are a large and complex number of variables determining the actual adjustment of particular individuals (above). At the same time, business expatriates experience *less* difficulty than new settlers, missionaries, or other sojourners (particularly students) moving to new environments. There may be several reasons for this. Firstly, business people are usually posted elsewhere for a set, specific and relatively *short period of time* (2–5 years); hence, they may see their move as relatively temporary, and not requiring much adaptation or change. Secondly, businessmen and women are posted abroad for a *specific purpose*, usually to deal with particular technical and managerial problems. This is not to say that the problems are simple – indeed they are often complex and highly intractable – but rather that many of their problems are confined to work. They do not, as a rule, have to worry about transportation, accommodation and other “housekeeping” problems. Thirdly, business people usually have *strong sponsorship*. Many are given financial incentives for working abroad, and often their life overseas is an improvement on their previous lifestyles. Furthermore, the sponsorship is not only financial, but may include social and political beliefs that increase rather than decrease a person's social standing, political power and influence in the new society. Fourthly, a tour abroad often increases opportunities for *advancement on return* (Inkson & Thorn, this volume). Many business people travel specifically to enhance their chances for promotion. Therefore, any hardships on the trip may be seen as a small price to pay for the rewards to be gained later.

In contrast to students, military people, and some new settlers, business “expats” tend to be *older and are usually more mature*. Although the literature is equivocal on this point, it is generally the case that older, more experienced and better educated people can cope with the problems of geographical movement (Furnham & Bochner, 1986; also Maynard et al., this volume). Businesses often provide accommodation enclaves, “old-hand” guides and a *social support network* that insulate the foreigner against the initial difficulties and surprises of movement. However, the long-term benefits associated with these “ghettos” are debatable, as they reduce contact with the locals from whom the skills of intercultural communication are best learned. Furthermore, because businesses are primarily interested in the work their employees do, the employees' *time is carefully structured and scheduled*. As unemployment researchers have shown, this is directly related to a reduction in mental illness. Finally, the *social relationships* both inside and outside the workplace are probably more likely to be on an *equal footing for businessmen* than for students (see Carr, Chapter 7 this volume, for a possibly higher footing on relative pay). Such equal-status, peer-group interaction probably goes some way to account for the better adjustment of business people compared to students, whose social relationships may put them in a relatively dependent role.

At the heart of a great deal of this research is an attempt to understand and therefore predict and assist the adaptation and adjustment of new settlers and expatriates. Various studies have listed various potential predictors. In a recent study of five different groups emigrating to Spain, Zlobina, Basabe, Paez, and Furnham (2006) looked at 11 predictor variables and how they impacted on self-reported, socio-cultural adjustment. They were: length of residence, age, gender, education, immigration status, expectations, plan of residence, relationships with hosts, relationships with co-nationals, perceived cultural distance, and perceived discrimination. The most powerful predictors of socio-cultural adjustment of new settlers were length of residence in the new culture, immigration status (having resident permits or being “illegal”), and perceived discrimination. Education, relationships with host nationals, and perceived cultural distance were other factors significantly associated with social difficulty in the receiving society. Length of residence, immigration status, and perceived discrimination were found to be independent or semi-independent of the context and culture.

In a very important review, Mol et al. (2005a) looked at personality and social predictors of successful expatriate job performance, which could inform better selection processes and procedures. They found, as have others, that four personality factors predicted performance: extraversion, emotional stability, agreeableness and conscientiousness. Two others that were consistently predictive were cultural sensitivity and local language ability. They concluded thus:

“Although a definitive profile of the ‘ideal overseas type’ may be premature at this point, we believe that the findings reported in this review are the most comprehensive basis currently available for the development of a valid predictor instrument [which] should focus on expatriates’ extraversion, emotional stability, agreeableness, conscientiousness, local language ability, cultural sensitivity, cultural flexibility, social adaptability, ego strength, interpersonal interest, tolerance for ambiguity, ethnocentrism, task leadership, and people leadership. In our opinion, attributing any other characteristics to successful expatriates is not possible at this point, because of the instability of the results” (p. 614, parenthesis added).

The cost of sending managers and workers abroad, often with their families, means that they often try to ensure they are able to quickly adapt to their new environment, and to perform well in it. The cost of management failure and subsequent repatriation means that large multi-nationals, as well as government agencies, international charities, and religious bodies, have had a long interest in the factors that help and hinder adults working abroad.

Different concerns, styles, and values can cause significant problems at work. As a result, there is an increasing interest in how managers and workers from different countries perceive similar issues quite differently. Trompenaars (1993, 1997) has reported fascinating data from managers from 47 different countries that show how much individuals differ. To all intents and purposes the business world is dominated by four sub-civilizations: the Saxon, Teutonic, Gallic and Nipponic (Galting, 1981). Partly because of the formal education and informal socialization that every culture affords, they have diverse ways of reaching decisions.

The *Saxon* style fosters and encourages debate and discourse. Pluralism and compromise are overriding values, and there is often the belief, particularly in America,

that the individual should be built up, not put down. Accepting that there are different perspectives and convictions, the general approach is that these should be debated and openly confronted, so that not only a compromise but a synergism is produced – a sum greater than its parts. The price of ecumenism is anodyne blandness.

This is quite different in the *Teutonic* and *Gallic* traditions. Firstly, less conflict is likely to arise, because groups are often more homogeneous, being selected and socialized for being “sound on the silent issues.” Teutons and Gauls love to debate, but not with antagonists, which would be considered a hopeless waste of time or an act of condescension. There is less tension-relieving humor – the tone is stiff and caustic.

The Japanese from the *Nipponic* tradition do not debate, partly through lack of experience and partly because their first rule is not to upset pre-established social relations. They respect authority and collectivist solidarity. Questions are for clarification and debate is a social, rather than an intellectual, act.

According to Galting (1981) the British have a penchant for documentation, the Americans for statistics. Both believe that data (reality) unite and theory divides. The British are distrustful of theories, “-isms” and “-ologies”; these are considered to be “sweeping generalizations”. Reports, graphs, and tables are seen as necessary back-up to support decisions. The Germans like theories which are deductive in both senses of the word, that the theory may be deduced from other more fundamental principles, and that it is fecund for practical deductions. It is not that they eschew data – quite the contrary – but they like to know the philosophical or economic model or theory that drives both data collection and decision-making. The Gauls are impressed by the elegance of theories and approaches. The aesthetic nature of the argument is appreciated. The use of *bon mots*, double entendres, alliterations and allusions to obscure cultural artifacts is celebrated, not shunned. For the Teutons, it is rigor before elegance; but for the Gauls, it is the other way round – the sound of words can be more important than their meaning.

Galting (1981) argues the Nipponese might fear inconsistency, ambiguity, and contradiction, but seem able to live with it. Arguments are less categorical, and it is perfectly acceptable to see things as tentative, not fully formed. Ideas and theories are very cautiously elaborated, with various kinds of excuses and apologies for their incompleteness. In decision-making groups, the Anglo-Saxons pretend they are all equal but different; the Teutonic leaders have to pretend that they have nothing much to learn; the Gauls, that they are all irrelevant to each other; and the Nipponese that they all agree.

Given a proposition, the Saxons ask: “How can you document or measure this?” The Teutons want to know “How can this be deduced from first principles?” The Gauls will wonder “Can this be expressed in French?” While a Nipponese approach is to ask “Who is the proposer’s boss?” It is no surprise, therefore, that courses on international management styles are so popular.

Whether this wry and amusing typology may or may not be accurate, the central idea certainly is true; that is, that national culture and values shape corporate culture and work behavior that people find completely normal and natural until they

confront people behaving differently. Consider another well-established issue, time punctuality: Some countries are *time-bound* (Germany, Britain, Switzerland and Scandinavia), whereas others are *time-blind* (Spain, Portugal, Greece). Time-bound societies emphasize schedules, deadlines, time waste, timekeeping, a fast pace of life. Time-blind societies are more relaxed and casual about time. Hence what is late in one society is not necessarily so in another. As societies become more time-bound, they have a more competitive attitude to time; so “fast” is better. Hence fast-living, fast-eating, fast-tempo, manic-type work behavior, emphasizing “catching up”, and not being “left behind”. Time-bound societies see time as linear, time-blind as cyclical. Time-bound societies centre work on clocks, schedules, delivery dates, agendas, and deadlines. This can make for serious misunderstandings at work.

Collett (1994) points out various other time-related distinctions that relate to the world of work. The first is the time-blind culture’s ability to distinguish between sacred and profane time. The former is for eating, family, and sleeping. Profane time is used for everything else. Hence, in Spain, meetings can be easily interrupted: time is not dedicated solely to the meeting. Second, there is also the distinction between time that is *mono-* vs. *poly-chronic*. Time-bound societies are monochronic – they do one thing at a time. Time-blind are polychronic, happily ignoring appointments, schedules, deadlines and tolerating interruptions. Third, there is the issue of time-orientation: past, present, and future. Thus the British are thought to be interested more in the distant and recent past, and therefore do not invest so much in the future, whereas the Germans have a longer view of the future, investing in basic research, education, and training.

The understanding and use of time is crucial in business. Not only does it lead to how, when, where and why work is done, but people with conflicting ideas and theories may have very different conceptions and expectations. This can lead to misunderstandings and animosity.

Adaptation and Adjustment

Furnham and Bochner (1986) have offered eight different explanations for culture shock, and evaluated the power of each “theory” to explain the phenomena. Briefly the eight explanations are:

- *Culture shock* is the *psychology of loss* and the phenomenon is akin to that of grief or grieving; therefore, it is experienced by most people but depends mainly on how much one loved, and was attached to, one’s mother country.
- *Locus-of-control* type beliefs in fatalism or instrumentation best predict culture shock. The more fatalistic, the less adaptive people are.
- *Social Darwinism* or selective new settlement forces are some of the best predictors of culture shock; that is, the more carefully new settlers are self-selected or selected by other forces (economic) for their ability and strength, the better they will be able to adapt.

- *Realistic expectations* about what will be encountered are the most important factors in adaptation. The closer the sojourners' expectations about *all* aspects of their new life and job approximate to reality, the happier they will be.
- Culture shock should be seen as, and calculated by, *negative life events*, such that the more actual change people experience and have to adapt to, the more likely it is they will experience culture shock. The sheer number of major life differences experienced is a good (negative) predictor of adaptation and happiness.
- The better, both quantitatively and qualitatively, *one's social support network* of friends, family and co-nationals, the better will be one's ability to overcome culture shock.
- *Value differences* between native and foreign culture are the most powerful predictors of adaptation and shock. The closer one approaches the fundamental values and behaviors that drive them, the easier it is to adapt (Maynard et al., this volume).
- The actual *social skills* one possesses in dealing with people from the Indigenous culture are the best predictor of adaptation and shock.

Furnham and Bochner (1986) attempt to point out the insights and limitations of each "explanation", favoring the latter four as having the most explanatory power. Certainly each explanation has important implications for how one "deals with" culture shock, and the psychological effects of change and transition.

Ward, Bochner, and Furnham (2001) noted three theoretical approaches to culture shock. A first approach is the *culture learning perspective*, which stresses the importance of acquiring culturally relevant social knowledge to cope with, and thrive in, any new society. This involves knowledge of social etiquette, conflict resolution, non-verbal communication, rules and conventions, forms of polite address, etc. To minimize culture shock, sojourners need to become communicatively competent in the new culture. They need to master the subtleties and nuances of the "hidden language" of cross-cultural interaction, to prevent friction and misunderstanding.

The second approach is the *stress, coping and adjustment process*, which focuses on the coping styles of individual sojourners as they attempt to adjust to the new culture. Thus their personality, social support network, knowledge and skills, and personal demography (age, sex) altogether, or in part, predict and explain how quickly and thoroughly they adapt. As they note, "Both macro and micro level variables affect transition and adjustment, and characteristics of both the individual and the situation mediate and moderate the appraisal of stress, coping responses and long and short-term outcomes" (p. 96).

The third approach focuses on *social identity and inter-group relations*. The idea is that how people see themselves and their group affects how they deal with those from a different group. Stereotypical attributions for the causes of behavior, and discrimination against "out-groups", but in favor of in-groups, are all seen to be functions of a person's self-identity. It is argued that various individual and social forces influence a person's sense of themselves which, in turn, influence their adaptation to and acculturation in, the new society (Tharenou, this volume).

One approach to understanding the adaptability of new settlers is based on cultural comparison. There are different theoretical frameworks which permit, indeed encourage, it. Perhaps the best known is Hofstede's (1980) four-factor theory, which looks at differences on dimensions such as individualism – collectivism. Using country-based scores it is possible to calculate an index of difference – similarity, which should predict the amount of culture shock, surprise or discomfort that a traveler going from one to the other may experience.

The problem, however, lies in which “system” to use, because they emphasize rather different factors. Furthermore, they do not imply that any one is more important than any other in predicting and explaining adaptation.

Reducing Expatriate Stress

Attempts to reduce ex- and repatriate stress, and to improve the skills and coping mechanisms of those preparing to move have been at the centre of research in this area. For instance, Brislin (1979) has listed five non-mutually exclusive programmes: self-awareness training (in learning about the cultural basis of one's own behaviour), cognitive training (where being given various facts about other cultures), attribution training (learning the explanation of behaviour from the point of view of people in other cultures), behaviour modification (individuals are asked to analyse the aspects of their culture that they find rewarding or punishing), and experiential learning (actively participating in realistic simulation).

Furnham and Bochner (1986) have examined some of these in greater detail, as follows:

- A. *Information-giving*: The most common type of cross-cultural orientation usually involves providing prospective sojourners with specific information about their new culture: facts and figures, in written form, lectures, or films about topics such as the climate, food, sexual relations, religious customs, and anything else the trainer may consider important. However, the effectiveness of such illustrative programmes is limited, because the facts are often too general to have any clear and specific application, except when discussing tax or organizational structure. Often programmes give the false impression that a culture can be learned in a few easy lessons, whereas all that they mostly convey is a superficial, incoherent and often misleading picture, which glosses over the culture's hidden agenda. Finally, even if the facts are remembered, they do not necessarily lead to action, or to the current action.
- B. *Cultural sensitization*: Here programmes set out to provide trainees with information about other cultures, as well as how to heighten their awareness about the cultural bias of their own behaviour, and how the practices of their society differ from those of the host country. The aim is to compare and contrast the different cultures, look at various behaviors from the perspective of each society, and thus develop a sensitivity to, and awareness of, cultural relativity. They

aim to achieve self-awareness about the modal values and attitudes that are typically held by members of one's own society; and to gain insight into one's own personal traits, attitudes, and prejudices.

- C. *Isomorphic attributions*: Researchers have pointed out that a potential obstacle to effective cross-cultural communication is the inability of the participants to understand the causes of each other's behaviour, that is, to make correct attributions about the other's actions. One solution is to train individuals to understand the subjective culture of the other group, which in practice means teaching them how to make "correct" behavioral attributions. A great deal also depends on which particular critical incidents are selected to form the basic curriculum. Inevitably, exotic, strange and hence less common events tend to be given greater prominence than the less interesting but more frequently day-to-day problems that make up the "bread and butter" content of intercultural contacts.
- D. *Learning by doing*: Behaviorally-based culture training programmes rely on role-playing encounters between trainees and persons pretending to come from some other culture, or with professional personnel from the other culture if they are actually available. The techniques are similar to those employed in social skills training. Some programmes also contain a behavioral evaluation component, which may take the form of a team of psychologists evaluating and training the performance of candidates in the field. The vast majority of sojourners, or those who come into contact with members of other cultures in their own societies, receive no systematic culture training whatsoever. The little "training" that does occur is done informally, by experienced fellow expatriates or well-traveled colleagues, who pass on useful information to the new visitors.
- E. *Intercultural (social) skills training*: Although there are various different approaches to social skills training, they share various elements in common. The first is an assessment or diagnosis of a particular problem (e.g., assertiveness) or situations (e.g., chairing meetings) that the person has or is likely to encounter. The second stage is an analysis or discussion of the elements in these problem areas, possibly followed by a modeling exercise, where a trainer enacts the role. This in turn is followed by a role play by the trainee, with critical feedback (at length) following each practice. The number, range, and variety of contexts in which the role plays are enacted add to the training's generalizability.

Conclusion

As little as a 100 years ago, even people in wealthier economies were born, lived, and died in a particular physical location. Because of limited educational and occupational opportunities, they took up the jobs of the parent, both in rural and industrial pursuit (Inkson & Thorn, this volume). Economic, political and social forces over the past century have changed that. War and religious persecution precipitated vast

numbers of refugees (Ager & Ager, this volume). The industrialization of whole societies saw a mass exodus from the country to cities. The growth of all forms of transportation made movement available to many.

Economic differences in growth and decline saw tremendous movement of people in search of new jobs and a better life. People can now easily travel for pleasure. Middle class Western children, for example, may have traveled with their parents to a dozen countries before going to school. European business people may think nothing of traveling to a dozen countries in a year.

In this sense, much of the world has shrunk. But the adaptation problems of people who move remain the same: To have to interact with, and be dependent on, people of another tongue and creed, with different beliefs and values remains problematic. Tough military people, highly committed teachers, and aid workers “break down,” and have to be repatriated. All this makes the study of psychological responses to work highly interesting and important, from both an academic and applied point of view.

Various disciplines have been involved in trying to document and understand the issues involved in occupational global mobility: psychology and psychiatry, sociology and geography, management science, demography and anthropology. Using different theoretical models and research methods, they have however found similar findings.

- A. First, people move for different reasons, and those motives impact on their adjustment and acculturation.
- B. Second, most people experience culture shock to some degree, which for some can be chronic and debilitating.
- C. Third, three sets of factors predict acculturation: individual differences (ability, temperament, values, as well as personal history); social factors (training, support); and cultural factors. Inevitably some people adapt, adjust, and acculturate quicker than others.
- D. Fourth, astute and informed selection, briefing and training can and does help the process, though there are various caveats as to how, what, and where this is done.
- E. Fifth, problems can occur with every move, albeit that some are of limited duration, and some involve a return to one’s point of origin.
- F. Sixth, psychological adjustment has immediate scalable costs for employers, as it affects newly arrived workers’ productivity as well as their attendance at work.

This is an interesting and complex applied area of research. It is made complex by the high number of interacting, confounding, moderating and mediating variables that relate to new arrivals’ acculturation and adjustment. However, the topic is simply too important for researchers to be put off by the complexity of the issues involved. The contribution of so many researchers, from so many different disciplines, has demonstrated that we are beginning to understand the issues involved in moving, and moving to work much better, and also putting in intervention policies for the benefit of all involved, including the new arrival, his/her family, employers, and all groups with whom a new arrival works and lives.

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Chapter 3

Mixed-Methods Approaches to Contextually Grounded Research in Settings of Armed Conflict and Natural Disaster

Kenneth E. Miller

Abstract This chapter examines the integration of qualitative and quantitative research methods in the development of culturally grounded mental health, and psychosocial assessment tools for use with populations displaced by armed conflict or natural disaster. After first arguing for the importance of grounding our assessment tools in local cultural contexts, the author then describes the unique and complementary contributions that qualitative and quantitative methods can make to the creation of contextually and empirically sound instruments. Of particular importance is the capacity of blended or mixed-methods approaches to identify and assess locally salient expressions of wellbeing and distress, as well as factors that influence mental health in specific contexts. Drawing on examples from research on the mental health of adults in Afghanistan and on the psychosocial wellbeing of youth in Sri Lanka, the author illustrates an easily replicable, sequenced approach to culturally anchored development of measures. First, qualitative methods such as free-listing and key informant interviews are used to identify relevant constructs and key indicators of those constructs; those indicators are then used as items in newly-developed measures of the target constructs. The measures are then pilot tested in community surveys and assessed for reliability and validity using traditional quantitative scale development procedures. The chapter includes a detailed discussion of the development and validation of the Afghan Symptom Checklist and the Sri Lankan Index of Psychosocial Status – Child Version.

Keywords Mixed-methods · War · Disaster · Assessment

Abbreviations

ADSS	Afghan Daily Stressor Scale
ASCL	Afghan Symptom Checklist
AWES	Afghan War Experiences Scales

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PTSD	Post-traumatic Stress Disorder
SLIPSS-A	Sri Lankan Index of Psychosocial Status for Adults
SLIPSS-C	Sri Lankan Index of Psychosocial Status for Children
UNHCR	United Nations High Commissioner for Refugees
UNDP	United Nations Development Programme

This chapter describes an approach to integrating qualitative and quantitative methods when conducting research with populations affected by armed conflict or natural disaster. The approach, which combines elements of “quick ethnography” (Handwerker, 2001) and traditional questionnaire development techniques, is designed to facilitate the construction of contextually grounded tools for needs assessment and program evaluation. Although the focus of the chapter is on mental health and psychosocial research, the methods discussed and the underlying rationale for their use are readily applicable to other areas of research as well.

Armed Conflict, Natural Disaster, and Forced New Settlement

At first glance, the relevance of research on armed conflict and natural disaster to a volume on mobility may not be apparent. However, both war and disaster often cause large-scale displacement of civilian populations – a sort of forced mobility that is profoundly disruptive and highly distressing. For example, the Afghan-Soviet war from 1979 to 1989, and the ensuing civil war within Afghanistan (1992–1996), led to roughly six million people, nearly a third of the pre-war Afghan population, fleeing into exile, primarily to neighboring Pakistan and Iran (Goodson, 2001; Rashid, 2000). Similarly, approximately two million Bosnians were displaced from their homes and communities during the intense warfare and ethnic cleansing that took place in Bosnia from 1992 to 1996 (US Committee for Refugees and Immigrants, 1997). The tsunami that hit South and Southeast Asia in 2004 likewise caused a massive displacement of coastal villages in several countries (ABC News Online, 2004), as did the earthquake that devastated regions of Pakistan in 2005 (UNHCR, 2006). Depending on the persistence of the particular conflict, or the severity of the disaster and the pace of post-disaster reconstruction, the period of displacement may range from a matter of weeks to indefinite periods of time extending over several years. And depending on the resources made available both locally and internationally, settings of displacement may range from the outskirts of large cities to refugee camps and informal settlements, either within or outside of the country of origin. In a minority of cases, displacement may become permanent when refugees or asylum seekers are granted permanent resettlement in receptive host countries.

Thus, forced mobility is a common element in the experience of many survivors of war and disaster. Although this chapter does not focus specifically on the experience of displacement, the experience itself unquestionably shapes the context of everyday life for many individuals and families in populations affected by armed conflict or catastrophic natural events. Consequently, in exploring ways of assessing contextually relevant variables affecting mental health in such populations, it

is important to recognize that a subset of such variables will likely reflect the experience of displacement and the host of stressors to which it commonly gives rise (for discussions of displacement-related stressors and their relation to mental health, see Birman et al., 2005, and Miller & Rasco, 2004; Ager & Ager this volume).

Contextually Grounded Mental Health Research with War and Disaster-Affected Populations

Research with war- and disaster-affected populations has traditionally been focused on the psychological effects of direct exposure either to pre-new settlement, war-related violence (e.g., being beaten, witnessing violence, or experiencing the destruction of one's home) or the actual disaster event (e.g., witnessing an earthquake or tsunami and its immediate destruction). In fact, a primary focus in much of the literature has been on assessing the relationship between direct exposure to such events and corresponding levels of psychiatric symptomatology – the so-called “dose-effect” phenomenon (Fox & Tang, 2000; Mollica et al., 1998). Increasingly, however, researchers have come to recognize that a narrow focus on direct exposure to catastrophic events overlooks the adverse impact of the myriad stressful conditions caused or worsened by such events – stressors such as widespread unemployment, extreme poverty, unsafe and overcrowded housing, the loss of social networks, distrust and divisions within communities, and the social marginalization of various affected sub-groups such as widows, former child soldiers, people with disabilities, and survivors of sexual assault (Ager & Ager, this volume; Berry, this volume; Boothby, Strang, & Wessells, 2006; Carr, Chapter 7 this volume; Davidson, this volume; Hernández-Plaza et al., this volume; Maynard et al., this volume; Miller & Rasmussen, 2010; Podsiadlowski & Ward, this volume). In the handful of studies that have examined *daily stressors* such as these and their relationship to mental health, the findings have been remarkably consistent: daily stressors have consistently been as strongly related to psychological wellbeing as direct exposure to the actual violence and destruction of war and disaster (Al Krenawi, Lev-Wiesel, & Sehwal, 2007; Farhood et al., 1993; Fernando et al., in press; Miller et al., 2008; Rasmussen et al., 2010). In fact, several studies have actually found that daily stressors are *more* strongly predictive of mental health status than level of direct exposure to war or disaster-related incidents of violence and loss.

The neglect of daily stressors and their relation to mental health in settings of conflict and disaster has been paralleled by a lack of attention to cultural variations in the experience and expression of psychological distress in such settings. Although the majority of armed conflicts and catastrophic disasters in the past 50 years have occurred in the developing world, researchers have typically adopted a western psychiatric framework to assess the impact of such events. Among the disorders studied, post-traumatic stress disorder (PTSD) has received particular attention, reflecting the widespread triad of assumptions that (1) PTSD is *the* universal expression of psychological traumatization; (2) the symptoms of PTSD have the same meaning and clinical significance regardless of the cultural context; and (3) PTSD is the

most critical mental health problem caused by political violence and natural disaster (Bracken, Giller, & Summerfield, 1995; Miller, Kulkarni, & Kushner, 2006). A small but growing number of researchers have begun to call these assumptions into question, based on findings that other expressions of trauma-related distress do exist and may in fact be more salient than PTSD in specific cultural contexts (Jenkins, 1996; Miller, Kulkarni, et al., 2006), and that even where PTSD symptoms (and indeed, the full syndrome) are present, other mental health issues are often of greater concern to community members (de Jong, 2002; Miller, Kulkarni, et al., 2006).

As interest grows in transcending the traditionally narrow emphasis on PTSD and its relationship to direct exposure to catastrophic events, there is a need for innovative methodologies that can help foster a deeper and more comprehensive understanding of the factors that affect mental health in the wake of armed conflict and disaster, the particular ways in which psychological wellbeing and distress are expressed in specific sociocultural contexts, and the mental health priorities of particular war- or disaster-affected communities (priorities that may or may not include PTSD at the top of their lists). Drawing on recent experiences in Afghanistan and Sri Lanka, the remainder of this chapter describes an increasingly popular approach to understanding local contexts and developing contextually grounded research tools.

Blending Qualitative and Quantitative Methods

Paul Bolton and his colleagues have pioneered the use of mixed methods approaches to developing culturally grounded mental health assessment tools in conflict and post-conflict settings. Generally, freelistings (asking participants to generate items such as indicators of psychosocial functioning or emotional distress), story-telling tasks, and key informant interviews are used to identify relevant items for the construction of questionnaires. These qualitative data also provide a rich source of information about whatever is being explored – for example, locally salient indicators and idioms of distress, help-seeking behavior, daily stressors, coping strategies and resources, or manifestations of healthy versus impaired psychosocial functioning. Newly constructed questionnaires using items gathered from the qualitative methods are then pilot-tested in community surveys, and their psychometric properties (reliability, validity, factor structure) evaluated using conventional data analytic techniques. Bolton and Tang (2002) illustrated this approach in their development of measures of functioning in rural areas of Uganda and Rwanda. Items reflecting positive functioning among women and men were gathered through a freelisting procedure; the most common items were then used to create functioning scales whose reliability and validity were established through their use in community surveys. Variations on this methodology have been implemented in a diversity of conflict and post-conflict settings (e.g., Fernando et al. in press; Miller et al., 2008; Miller, Kulkarni, et al., 2006; Rasmussen et al., 2010; Hubbard & Pearson, 2004), and an informative discussion of it can be found in de Jong and van Ommeren (2002).

Research in Afghanistan: Development of the Afghan Symptom Checklist

The overthrow of the Taliban in November of 2001 created an opportunity to address the mental health needs of Afghans affected by more than two decades of interstate and civil war, severe oppression under the Taliban, and prolonged drought that devastated crop production and worsened the already dire conditions of daily life for many Afghans (Goodson, 2001; UNDP, 2005). Eight years after being driven from Kabul, however, the Taliban remain a major threat to the US-supported government and a serious impediment to reconstruction and development. Moreover, much of Afghanistan is still controlled by warlords, many of whom are heavily involved in the opium trade, while the government is increasingly regarded as ineffective and corrupt, both locally and nationally (Afghanistan Conflict Monitor, 28 May, 2009; International Crisis Group, 2007).

Nonetheless, numerous efforts have been made to begin documenting and addressing mental health and psychosocial needs in Afghan society (CARE, 2004; CARITAS, 2004; Lopes Cardozo et al., 2004; Omidian & Miller, 2006). The research described here was part of a collaborative effort between Dr. Patricia Omidian and her staff at the American Friends Services Committee in Kabul, and American psychologist Ken Miller, to better understand and address mental health needs of Afghans in the post-Taliban era. Interested readers are referred to Miller, Omidian et al. (2006, 2008, 2009) and Omidian and Miller (2006) for papers that have been published based on that collaboration.

Our initial goal was to develop a culturally appropriate mental health questionnaire that could be easily used for needs assessment and program evaluation by organizations working with Afghans. Previous research had used measures not specifically adapted to or standardized for Afghanistan (e.g., Lopes Cardozo et al., 2004), relying instead on constructs and specific items derived from research in other cultural contexts. Our first task, therefore, was to identify locally meaningful indicators of wellbeing and distress. Towards that end, we began by using a convenience sample of ten women and ten men, drawn from two districts of Kabul. Women were approached in their homes by the two Afghan female interviewers, while men, who are rarely at home during the day, were approached and interviewed in various locations (mosques, shops, and on the street) by the two male interviewers. The interviewers were community members themselves, with extensive training in community research methods.

Participants in this phase of the project were asked to think of two people they knew who had suffered emotionally because of difficult life experiences. One person should be someone who had recovered and was now functioning well despite the difficulties they had experienced, while the other person should be someone who continued to suffer despite the passing of time. Participants were then asked to relate the details of each person's story (i.e., what hardships they had experienced and the ways in which they had been affected). They were also asked to describe specific indicators that reflected each person's suffering ("How could you tell that they were suffering?"), and, if appropriate, their recovery and wellbeing ("How could you tell

that they were doing better?”). Lastly, participants were asked to explain why they believed the healthier person had recovered (i.e., was no longer suffering) and why the distressed person was still experiencing difficulties.

This story-telling/freelisting method elicited richly detailed narratives containing indicators of distress that included both culturally specific items (e.g., *jigar khun*, *asabi*, *fishar-e-bala*, and beating oneself when highly distressed), as well as items commonly found in western assessment measures (e.g., rumination, crying, insomnia). *Jigar khun* reflects a state of grief, sadness, or heartbreak; *asabi* is a state of nervous irritability or reactivity, and *fishar-e-bala* refers to a feeling of emotional pressure and agitation, sometimes misinterpreted as a state of high blood pressure. A sample narrative is included below (from Miller, Kulkarni, et al., 2006: 425).

Box 3.1 Sample narrative

The daughter of the woman who is the focus of this story told us the story. She said “We were four sisters and four brothers”. Only two of our sisters were older and the rest of our brothers and sisters were younger when our father died of natural causes. Our mother raised the children under very poor circumstances. During that time the fighting was very bad. One of our brothers left home to go get groceries; he was only 21 years old. The fighters asked him where he was from then they killed him. This affected our mother very much. Then our 18-year-old brother left to go get groceries too, and a bomb hit that area and he died. Our family was at home but they brought the bodies to our mother. Our second brother died 2 months after the first brother. Our mother continued to live her life but she is very weak. She works at a hospital. Her pay, which is 1700–1800 Afghani (about 36 dollars) a month helps her live her life. And her two sons live with her. She always has a severe headache. Her *fishar* is always high and she has diabetes. She doesn’t have much of an appetite. She often becomes *jigar khun* and cries a lot and tries to stay away from people when she is at home. She tries to stay away from gatherings and if she does go she becomes very impatient while she is there. Every time she thinks about one of her sons and how one was shot with holes in his body and how the other one was shattered into pieces because of the bomb she becomes very impatient. When she is very impatient she becomes angry and starts fighting. She is always talking about her sons. There are tears in her eyes all the time and when she cries too much her eyes turn red. When she is at home she puts a curse on the people who took her sons away from her. She prays, and she does not have a good relationship with her family.

Once the narratives were gathered, the most frequently mentioned indicators of distress were then identified, and were used to form the items of the new measure, the Afghan Symptom Checklist (ASCL). Although we had hoped to include an equal number of items reflecting the three domains of distress that emerged (distress limited to a person’s internal state, distress affecting behavior within the

family, and distress affecting behavior within the community), a disproportionate number of items fell into the first category (“internal state”) and so the 22 item ASCL reflects this. The measure, initially created in English, was then translated into Dari and back-translated into English, and any discrepancies were corrected. The survey team then reviewed all items for ease of understanding. The ASCL asks participants to indicate how often they have experienced each of the items during the past two weeks, ranging from “Not at All” (using the graphic of an empty glass) to Everyday (using the graphic of a full glass). The graphics served as visual aids to help participants understand the answer choices after each item was read aloud to them by the surveyors (because of Afghanistan’s low literacy rate, the survey was administered orally by the survey team).

The ASCL was then pilot tested on a community sample of 30 women and 30 men in two districts of Kabul. All items were readily understood, and the measure demonstrated a high level of internal consistency (Cronbach’s $\alpha = 0.93$). Therefore, all items were retained, and the ASCL was subsequently administered to an additional 264 adults, 132 women and 132 men, representing eight of Kabul’s 16 districts. 58% of the participants reported having fled their homes and communities at some point during the war, either becoming internally displaced or crossing the border into Pakistan.

To assess the validity of the ASCL, we also administered the Afghan War Experiences Scales (AWES), a measure of commonly experienced war-related stressors. Given the strong relationship generally found between measures of distress and war exposure, we expected to find a similarly strong association between the ASCL and the AWES if the ASCL was in fact a valid measure of distress. That is precisely what we found: the ASCL and AWES correlated at $r = 0.70$ ($p < .001$). Finally, we conducted an exploratory factor analysis of the ASCL, and found that it contained three factors or subscales, two reflecting different states of dysphoria (one with social withdrawal, rumination, and somatic distress, and one without those symptoms) and another reflecting a state of nervous irritability. Internal consistency of the subscales ranged from 0.93 to 0.74.

The ASCL has subsequently been used as a tool for needs assessments and program evaluation by organizations working in Afghanistan; it has also been used as an outcome measure in several studies of mental health in Afghanistan and the range of factors influencing it (Miller et al., 2008; Miller, Omidian Kulkarni, Yaqubi, & Rasmussen, 2009; Panter-Brick, Eggerman, Mojadidi, & McDade, 2008). In our own research, we first used the ASCL to assess patterns of distress among Afghans in Kabul (Miller, Omidian, et al., 2006). In that study, women showed markedly higher rates of distress than men, while widows, who comprised roughly half the sample of women, reported still higher levels of distress than married women. In a subsequent study examining war exposure, daily stressors, and mental health in Kabul (Miller et al., 2008), the ASCL was used along with several conventional measures of distress (depression, anxiety, functional impairment, and PTSD). In that study, salient daily stressors were first identified through focus groups and then assessed systematically using the newly created Afghan Daily Stressor Scale (ADSS). For most outcomes, including the ASCL, current daily stressors were a better predictor of mental health status than level of previously experienced war

exposure, suggesting the importance of addressing mental health through comprehensive interventions that target not only war-related trauma but also ongoing stressors such as poverty, unemployment, overcrowded and unsafe housing, domestic violence, health concerns, illiteracy, and social isolation. Finally, we also used the ASCL in a study examining the validity and usefulness of the PTSD construct in Afghanistan. In that study, we found that although PTSD does seem to be a valid diagnostic category among Afghans, it has limited utility relative to local expressions of distress such as *jigar khun*, *fishar*, and *asabi*, which seem to better capture the experience of distress among Afghans in the wave of painful and potentially traumatic life events.

In addition to providing us with a culturally relevant set of indicators of distress that we used to create items on the ASCL, the story-telling/free-listing task yielded rich data regarding local beliefs concerning factors that give rise to different types of distress, ways in which psychological distress may impact functioning, and the types of resources – both intrapersonal and social – that are likely to promote psychological resilience or foster recovery among Afghans in the wake of adverse life events. We learned about the importance of distinguishing between suffering resulting from *djinn* (spirit) possession and distress related to difficult life events; about the enduring and painful nature of *jigar khun* in a society so pervasively affected by experiences of loss; and about the psychological importance of external social support (emotional and material) as well as inner resources such as *saber* (an Arabic term referring to patience and, in the Afghan context, holding on to one's faith and not losing hope). Thus, the qualitative phase of the mixed methods approach described here can serve at least two important functions: the identification of key variables for instrument development, and a contextualized understanding of those variables.

The ASCL is not intended to replace western measures of mental health; rather, it is meant to serve as a culturally grounded complement to such measures. Having said that, however, the ASCL is a valid measure of psychological distress for use in Afghanistan, and its items reflect the most salient ways in which distress is expressed among Afghans. Consequently, for service organizations or researchers requiring a culturally appropriate and easily administered measure of distress, we believe the ASCL is a useful option. The measure has since been translated into Pashto, the other major language of Afghanistan, and has been adapted for use with youth as well (Panter-Brick, personal communication).

Research in Sri Lanka: War Exposure, Natural Disaster, and Daily Stressors as Predictors of Mental Health among Youth in Eastern Sri Lanka

Fernando (2008) has described her adaptation of the mixed methodology used to create the ASCL in her research with adults in Sri Lanka, where she developed the Sri Lankan Index of Psychosocial Status for Adults (SLIPSS-A). The SLIPSS-A is

a culturally grounded tool that provides a comprehensive self-report-based assessment of adult mental health and psychosocial wellbeing. In a follow-up study, we used focus groups, parent interviews, and an expert panel to develop items for a child and adolescent version called the SLIPSS-C (Fernando et al., in press). We also used that same methodology to develop a measure of daily stressors – the Children’s Daily Stressor Scale (CDSS). Here, I briefly describe the development of the CDSS and its use in a study of factors affecting mental health among youth in eastern Sri Lanka. Interested readers are referred to Miller et al. (in press) for a more detailed discussion of the development of the CDSS, and to Fernando et al. (in press) for an in-depth discussion of the study and its findings.

As in other areas affected by war and natural disaster, research on mental health in Sri Lanka has tended to focus on the post-traumatic sequelae of direct exposure to armed conflict or disaster-related events (e.g., Neuner, Schauer, Catani, Ruf, & Elbert., 2006). A compelling exception is the ethnographic work of anthropologist Jason Hart and his colleagues (Hart, Galappatti, Boyden, & Armstrong, 2007) examining multiple sources of stress (and distress) among children in the eastern province of Batticaloa. Like Hart et al., we hoped to move beyond a narrow focus on direct exposure to also consider the influence of ongoing environmental stressors that might be adversely affecting young people’s wellbeing in the south-eastern district of Ampara, a region badly affected by both the civil war and the tsunami. Unlike Hart et al., however, whose work was strictly qualitative, we hoped to gather qualitative data in the service of developing contextually and psychometrically sound measures for use in a multivariate study that would allow us to examine the relative contribution of war and disaster exposure on the one hand, and daily stressors on the other, to young people’s mental health and psychosocial wellbeing (see also, Hernández-Plaza et al., this volume).

Development of the Children’s Daily Stressor Scale

Our first step in constructing the CDSS was to identify locally salient daily stressors affecting youth in the three ethnic groups represented in Ampara District: Sinhalese, Tamil, and Muslim. Working in collaboration with the staff of the Centre for Psychosocial Care, a multiethnic psychosocial service organization in Ampara, we conducted six focus groups with youth in various settings and in the primary language of group members: two Sinhalese groups were held on the grounds of two schools serving primarily Sinhalese students; two Tamil groups were conducted in village meeting halls, and two Muslim groups were held in the meeting spaces of two camps for families that had been displaced by the tsunami. The Sinhalese youth came primarily from villages on the frontline of the civil war (“border villages”), while the Tamil and Muslim youth had been heavily affected by the tsunami and, particularly for Tamil youth, the prolonged armed conflict as well. With regard to forced mobility, many families in the border villages had been leaving their homes with their families every night for the better part of the previous 7 years,

staying with relatives or friends farther from the frontline, in response to a series of massacres that left local villagers too frightened to remain in their homes during the night. Among families whose homes were destroyed by the tsunami, many has spent roughly 18 months in crowded and impoverished camps, with no clear prospect of when they would be able to return to their homes. Thus, the experience of displacement was salient for many of the participants in this study.

To help us identify daily stressors for the CDSS, participants in each group were asked to identify anything that made young people's lives difficult or stressful in their community. Although we were concerned that girls might not be forthcoming in mixed-sex groups, participation by youth of both sexes was similarly good in all of the groups. Focus groups included an average of seven participants, ranging in age from 13 to 19 years, with a roughly equal number of male and female participants.

A total of 20 stressors were identified in the focus groups. Nine additional items were added to the CDSS based on input from the local counselors of our NGO partner, all of whom had extensive experience working in the area, and based on previous research by Fernando (2008). The 29-item CDSS can be seen in Table 3.1. The 20 items identified in the focus groups are the first 20 items on the scale.

Table 3.1 Items on the children's daily stressor scale

-
1. Lack of privacy
 2. Going to jungle at night
 3. Lack of educational resources
 4. Lack of educational opportunities.
 5. Problems with teachers tutoring some children
 6. Inadequate housing
 7. Unwanted sexual advances
 8. Parental substance abuse
 9. Sibling drug and alcohol abuse
 10. Sibling smoking
 11. Social rejection
 12. Risk of being sexually exploited
 13. Fear of being sexually abused
 14. Inadequate water
 15. Snakes in house or environment
 16. Parent abandonment
 17. Inadequate religious education
 18. Media portrayals of sex
 19. Physical abuse by teachers
 20. Physical abuse by parents
 21. Saw your mother or father hitting your father or mother
 22. Heard your mother or father hitting your father or mother
 23. Heard your mother or father yelling at your father or mother
 24. Hit so hard you had injuries
 25. Had a serious medical illness
 26. Yelled so hard it frightened you terribly
 27. Touched sexually without your permission
 28. Taken care of someone who was dying
 29. Leaving home in order stay safe
-

Respondents are asked to indicate whether they have experienced each item Never (0), Once (1), or More than once (2).

After an extensive process of translation and back-translation from Sinhalese into English and Tamil and back again, and an additional set of focus groups to ensure accuracy and ease of understanding, the CDSS was then used, along with a measure of direct war and tsunami exposure, to examine factors influencing the mental health and psychosocial wellbeing of youth in Ampara District. Interested readers are referred to Fernando et al. (in press) for a detailed description of that study and its results. Here, the key findings are briefly summarized:

- An exploratory factor analysis revealed three factors or subscales within the CDSS, including “Deprivation”, “Interparental Conflict” (verbal and physical), and “Abuse” (including both physical and sexual abuse).
- Multiple regression analyses revealed that daily stressors accounted for greater variance than war and tsunami exposure in levels of PTSD, depression, and anxiety symptoms.
- On the locally constructed measure of psychosocial wellbeing (the SLIPSS-C), daily stressors and war/tsunami exposure accounted for roughly equal variance in (i.e., were similarly good predictors of) SLIPSS-C total score and the Externalizing, Internalizing, and Social Withdrawal subscales.
- Similar results were found when the CDSS subscales were used instead of the CDSS total score. Abuse was related to all outcomes at a level comparable to or greater than war/tsunami exposure. Deprivation was significantly related to PTSD, internalizing behavior, and anxiety at levels equal to or greater than war/tsunami exposure.
- Meditational analysis revealed that Abuse and Deprivation partially mediated (explained) the relationship between war and tsunami exposure and mental health. Abuse and Deprivation were both positively related to war and tsunami exposure and to levels of distress; when these daily stressor subscales were added to the regression models predicting distress, the relationship between direct exposure and mental health status was markedly reduced, though it remained significant.

The results of the survey reflect what we learned in the focus groups; namely, that the stressful social and material conditions of everyday life, many of which were caused or worsened by the war and/or tsunami, represent enduring sources of stress (and distress) for young people in Ampara District. This suggests the importance of comprehensive interventions aimed at altering those stressful conditions, rather than focusing narrowly on healing the lingering effects of war- disaster-related post-trauma reactions. Moreover, the salience of child abuse and its relation to PTSD suggests that even in emergency settings, not all post-trauma reactions are related to catastrophic events such as war and disaster. Indeed, for children suffering under ongoing abuse at home or in the community, intervention programs focused on healing the effects of previously experienced war or disaster trauma may seem profoundly out of sync if current sources of trauma are not also addressed.

Conclusion

Mixed methods designs such as those described in this paper are ideally suited for helping researchers identify locally salient constructs and variables, and for developing contextually grounded assessment and evaluation tools. The methods are easily implemented, and require a minimum of outside expertise for organizations' limited research capacity. Moreover, the qualitative methods not only help to identify key items for questionnaires, they also give insight into the relative importance of different variables (e.g., what stressors are most salient in different settings? Which mental health problems are of greatest concern to different groups within particular communities? What resources are available to help young people cope with different sources of stress?). As interest grows in understanding the ways in which increased mobility, including forced new settlement, affect mental health, there will be an ever greater need for methodologies that allow researchers to understand the impact of changing contexts on psychological wellbeing. Mixed-methods approaches can greatly enhance our ability to ground our research in local contexts and to capture the relationship of changing contexts to the mental health among individuals and families displaced by extreme adversity.

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Chapter 4

Ethical Psychological Practice with Geographically Mobile Individuals and Groups

Graham R. Davidson

Abstract The chapter offers a detailed analysis of the competing interests evident in contexts of new settlement and other forms of geographical mobility, including conflicts that occur between the welfare interests of direct recipients of research and professional services, the interests of the communities to which they belong, employers' expectations, and the welfare of the wider community. It also analyses dilemmas confronting researchers and professionals who work with mobile populations, which relate specifically to the conflicting ethical responsibilities of autonomy, beneficence, non-maleficence and justice they hold toward direct recipients of these services. Contrasting models of cultural competence as a relevant, related ethical precept are also considered. The chapter then suggests a model of ethical reasoning and decision making in the form of *prima facie* duty theory, as well as some training models that might assist researchers and other service providers in learning to make responsible ethical decisions when ethical dilemmas such as those described above are present. Finally, the chapter identifies and analyses various types of distress, such as burnout, ethical distress and vicarious traumatization, which workers may experience when working with vulnerable, mobile individuals and groups, and it briefly describes some ways in which researchers and other service providers may inoculate themselves against, and deal with, such distress.

Keywords Vulnerable clients · Conflicts of interest · Ethical decision making · Professional distress

Abbreviations

APA American Psychological Association
APS Australian Psychological Society
CPA Canadian Psychological Society

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This chapter considers some of the ethical challenges that confront psychologists and allied professionals working with individuals and groups of people who are contemplating, or forced to consider, leaving the community in which they are living *or* who are in between communities of residence *or* who are settling into a new community. The complexities of practice and accompanying ethical responsibilities are immediately evident in the mobility trajectory from the point of pre-departure (in many instances pre-flight), through the transit stage, which for some individuals and groups may last months or years and involve temporary relocation, to resettlement. Those complexities are further exacerbated by often competing legislative and other legal constraints and community norms through which psychologists must navigate in their efforts to practice ethically. Then there are questions about whose ethics apply – psychologists', other professionals' or service recipients' – and in what circumstances? It is also important to consider whether the nature of the practice involves research, community engagement, organizational development, or individual or group therapeutic services, not because one should apply different ethical standards when the nature of the practice changes, but because different forms of practice often involve different stakeholder entities, each of which may bring its own ethical prism and set of expectations to the service setting. Finally, but by no means exhaustively, different geographical, geo-political, local political, cultural, and community contexts in, and between, which mobility takes place may present psychologists with specific ethical dilemmas which must be resolved in the best interests of service recipients. Considering all these competing, often conflicting, circumstances, constraints, expectations, and vested interests, it is important for psychologists who practise with mobile individuals and groups to adopt and apply a philosophically defensible model of ethical reasoning and decision making.

This chapter is not designed to be an exhaustive review of research with mobile individuals and groups; nor does it attempt to provide a comprehensive ethical guideline for practitioners in these settings, which covers all of the ethical standards that one would apply in the normal course of practice. It looks instead at some of the competing interests that are evident in contexts of new settlement and other forms of geographical mobility, and it addresses some of the dilemmas confronting researchers and professionals who work with mobile populations, including cultural competence as a relevant, related ethical precept. It suggests a model of ethical reasoning and decision making in the form of *prima facie* duty theory, as well as some training models that might assist practitioners in learning to make responsible ethical decisions when ethical dilemmas are present. Finally, it discusses various types of distress that workers may experience when working with vulnerable, mobile individuals and groups, which could take the form of ethical distress, unresolved counter-transference and vicarious traumatization, and it briefly considers some ways in which they may inoculate themselves against, and deal with, distress.

By way of explanation, *practitioner* will be used to cover those who undertake work involving research, supervision, therapeutic, organisational or other consulting services for mobile individuals and groups. It is argued that the model of ethical reasoning and decision making and the conditional principles or duties that

underscore ethical psychological practice apply equally to research, supervision, therapy and other forms of psychological consultations, although it is understood that specific standards of conduct may apply in these different types of practice. Use of the practitioner term is also inclusive of other allied professionals and researchers who may be mandated to practise in accordance with their profession-specific codes of conduct or research, but whose professional and research codes are principle-based. Research, supervision, therapy and other forms of professional consultations are labelled inclusively as *services*. Where appropriate, the terms *service recipient* and *parties to a service* respectively are used inclusively for patients, clients, research participants or supervisees, and for other stakeholders in a service.

Ethical Dilemmas of Service Provision

Competing Theories of Ethics

Selecting – or, more correctly, advocating for – a specific ethical reasoning and related decision making model in psychology is a fractious exercise. Formulation of professional codes of ethics, such as the American Psychological Association (APA, 2002), Australian Psychological Society (APS, 2007) and Canadian Psychological Society (CPA, 2000) codes, has drawn on principle, virtue, utilitarian, and normative ethical theory (Davidson, 2006). These different philosophical paradigms pose different, often contradictory, ethical questions (e.g., see Miner, 2006) about discernment of one's ethical responsibilities to individual service stakeholders, the profession and the community. Furthermore, while professional associations, research bodies, and licensing authorities may set, and insist on, minimum ethical standards for psychological research and professional practice, they cannot insist that practitioners think deontologically, characterologically, consequentially, or normatively when deciding the ethical course of action they must take in a given situation.

Even when different practitioners operate within an implicit ethical decision-making model (Ross, 1930), as opposed to a Kantian, virtue or utilitarian model, there can be disagreement about the order and importance of one's *prima facie* ethical duties to the parties to a service. For example, in the APS (2007) Code of Ethics the *prima facie* principles of respect for rights and dignity, propriety and integrity are equally weighted. The CPA (2000) Code of Ethics states that, while its four ethical principles of respect for dignity, responsible caring, integrity and social responsibility are equally weighted, in situations where there are conflicting responsibilities the principles should be weighted in that order, giving priority to interested parties' autonomy and related rights. Practitioners, therefore, are none the wiser because of these codes about whether, in a given situation, they should give priority to service recipients' autonomy, or to their benefit, or to preventing harm from occurring to them, or to maintaining strict professional boundaries with them. These dilemmas

are evident in the different emphases that codes place on social action and other forms of advocacy, with some codes eschewing practitioners' engagement in direct advocacy on behalf of individual clients and other codes prescribing direct advocacy where the circumstances require that type of support for service recipients (Davidson, 2010).

Competing Ethical Responsibilities

Research ethics codes highlight a similar dilemma about the rank ordering of researchers' duties. The ethical guidelines for research practice published by the Refugee Studies Centre (2007) at the University of Oxford have listed eight broad principles (and 21 sub-principles) that should form the basis of researchers' relations with research participants, starting with (1) Protecting research participants and honouring trust, and ending with (8) Participants' involvement in research. The remaining principles cover concepts of harm avoidance, privacy and confidentiality, fairness, intellectual ownership, and autonomy. Additionally, the guidelines identify a number of responsibilities that researchers have to employers, sponsors, funding bodies, colleagues, their discipline, host governments and society in general. The guidelines state that researchers often deal with "competing duties, obligations, conflicts of interest, and with the need to make implicit or explicit choices between values and between the interests of different individuals and groups" (Refugee Studies Centre, 2007, p. 163), but they make the point that researchers "cannot resolve difficulties in a vacuum nor allocate greater priority to one of the principles over another" (Refugee Studies Centre, 2007, p. 172). Notwithstanding, resolving dilemmas without harming research participants and maintaining integrity are principles to which special reference is made.

Consequently, it is unsurprising that there is some disagreement about the rank order or ethical responsibilities among researchers who work with groups such as refugees and asylum seekers, internally displaced persons, poor communities, etc. For example, when writing about the confrontational nature of conducting research with people and communities from refugee backgrounds, Mackenzie, McDowell, and Pittaway (2007) maintained, in cases where researchers are witnesses to human rights violations and criminal acts of sexual and other violence, that "when a human being is in need and the researcher is in a position to respond to that need, non-intervention in the name of 'objective' research is unethical." (p. 316). Responding ethically in such circumstances, according to Mackenzie et al., may require direct intervention in the lives of research participants or associated parties, active moral protest against human rights violations, or direct assistance for victims or associated parties who wish to advocate on behalf of themselves or other victims. Furthermore, research which does not offer some form of benefit to vulnerable research participants directly through skills development, personal and community capacity building, improved social and health conditions, or changes to unjust public policies and practices, is unethical.

Mackenzie et al. (2007) acknowledged that giving priority to direct social action or other forms of advocacy designed to produce an immediate benefit and prevent immediate harm presents researchers with the difficult ethical dilemma of how to do so while showing respect for vulnerable research participants' rights to decide what *they* should or could do. Beneficent action that takes the form of direct assistance and non-maleficence in the form of direct harm prevention have precedence over the latter in the form of *do no harm* and may also have precedence over individuals' limited right to autonomy. In contrast, Núñez and Heyman (2007), who worked with undocumented Mexican new settlers in the United States, made a strong case for adoption of a stringent application of the *do no harm* rule and they prioritize this duty over the duty of beneficence. Their alignment of ethical duties was a clear reaction to the possibility of research participants' identities being revealed to authorities as a result of the inadvertent actions of the researchers and the realities of those participants being incarcerated and deported as undocumented new settlers. Weighing the immediate, direct risks to individual participants themselves of their engagement with the researchers against the potential benefits of the research for current and future hidden persons and groups remained an unresolved dilemma (Núñez and Heyman, 2007).

Ellis, Kia-Keating, Yusuf, Lincoln, and Nur (2007) examined restrictions that may be placed on refugees' ability to consent knowingly and voluntarily to research participation. Such restrictions on individual autonomy may result from limited comprehension of the process or activity for which the research is sought, cultural values that subjugate the rights of an individual to those of the collective, hierarchical cultural decision making processes, and learned political and bureaucratic subservience. Furthermore, individuals may be exposed to a range of social, cultural, financial, and new settlement pressures that place limits on their rights to decide about research participation and other types of service reception. As was also the case for Mackenzie et al. (2007), the community research experience raised for Ellis et al. (2007) the question about individual, collective and broader social costs and benefits of their research, therein again creating the dilemma between autonomy, immediate benefit, harm prevention, and making a contribution to the greater good. Both commentaries sought to resolve these ethical dilemmas through participatory engagement with the communities with which they worked. Mackenzie et al. argued that social action designed to benefit or prevent further harm to vulnerable participants, to be ethical, must be negotiated with those who stand to benefit or be harmed by the researcher's actions. This involves, where possible, obtaining participants' consent for the researcher to intervene, protest or provide advocacy support, as well as the consent required for the initial research activity or service delivery. Ellis et al. engaged the community leaders through establishment of community advisory boards and community meetings that provided members of the community with opportunities to participate actively in the research, have a thorough understanding of the research aims and objectives, understand how research outcomes may best be put to use, and volunteer as research participants.

The participative research approaches adopted by Mackenzie et al. (2007) and Ellis et al. (2007) are not inimical to the philosophy and practices of shared

decision making in health and medical services (Dy, 2007; Patel, Bakken, & Ruland, 2008; Schauer, Everett, del Vecchio, & Anderson, 2007; Whitley, 2009). Shared decision making models of health care provide for mutual exchange of information between the practitioner and service recipient, and both parties deliberate jointly to reach a decision about the most suitable, preferred service option. The practitioner offers professional knowledge and opinions that demonstrate respect for the recipient's decision making capabilities and allow for expression of the latter's wishes before a mutual decision is reached. Although Ellis et al. considered the need to balance the competing ethical duties of respect for individual and collective rights, individual welfare, and the greater good, how such a balance might be achieved is never clearly evident or simple. Community engagement, collective decision making, and respect for the rights of individual service recipients do not always lead to service provision that is in the best interests of the collective as well as of individual recipients. The collective decision may also not be commensurate with best practice from the practitioner's perspective. In fairness to the efforts that Ellis et al. made to achieve balance between individual and collective good and harm, utilitarian models of ethics that search for such balance are philosophically flawed (Ross, 1930).

Blurring of boundaries between the role of researcher and the roles of professional advocate, personal advocate, and possibly even treating practitioner, in addition to calling into question the autonomy principle, also directly challenges the integrity principle. While the focus of Mackenzie et al. (2007) was on the ethical dilemmas arising from research with politically and economically vulnerable individuals and communities, similar dilemmas may be present for practitioners offering therapeutic and other consulting services. How should practitioners prioritise service recipients' rights to decide what they should or should not do, or who should decide and act on their behalf, beyond the immediate service being delivered, with the practitioner's imperative duty to bring about immediate good and prevent immediate harm? In other words, how might practitioners act ethically at all times toward the various recipients and other parties who have a stake in services being provided? How might practitioners proceed when it is clearly evident that individuals and groups with whom they work have limited opportunities to exercise their human and civil rights in circumstances where their rights to decide are compromised by political, legal or economic factors that are beyond their control (e.g., see Torczyner, 1991). At the very minimum, practitioners need to find ways of engaging service recipients in a linguistic medium in which they are fully competent and at a level that is commensurate with their educational experience. Practitioners should explain fully the possible, foreseeable risks and negative impacts that might result from recipients' participation in research and consulting services, including the possibilities that participation may be distressing and/or may have implications for their current sojourner status. If interpreters assist with service delivery, the practitioner should discuss informed consent documentation, processes and outcomes with the interpreter before the service is commenced.

Case Example – Dr N

Dr N and a team of doctoral researchers have been engaged in the development, implementation and evaluation of a comprehensive, community-based program designed to increase social inclusion and mental health status of women from refugee backgrounds. They have been working with a community organisation which represents the interests of specific ethnic groups, provides support for new arrivals and creates social networking opportunities for established citizens from those ethnic backgrounds. The team has been very careful to ensure that representatives of the organization have been involved in a meaningful fashion in program development and implementation, that the program has been explained thoroughly to organizational members and that organizational networks have been utilised as a means of recruiting women for the program. Agreed-on conditions for data collection, program evaluation and publication of findings have been negotiated with the community organisation and with individual participants, giving the organization and individual participants certain rights of access to evaluation data and rights of negotiation in deciding on the content of publications and the final report. In summary, Dr N and the team have made an earnest attempt to address their ethical responsibilities both to individual participants and to the cultural collectives with whom they are working. In the course of their research, the team becomes increasingly concerned about the incidence of intimate partner and other family violence in at least one of the cultural collectives and it forms the opinion based on patterns of family violence it observes that there is a high incidence of trauma-related psychopathology amongst male perpetrators of the violence. Its concerns are supported strongly by some women participants advocating for better personal safety for themselves, other women and their children. The team raises these welfare and safety concerns with office bearers of the community organization with the suggestion that the program be broadened to include community-based mental health assessment services and a treatment program for perpetrators. The office bearers, many of whom are male, unexpectedly voice their concerns about the possibility of members of the cultural collective being stigmatized as violent and prone to mental illness, and about the effect this might have on government support for immigration under family reunification provisions. The organization subsequently withdraws from the research partnership and vetoes the team's publication or reporting of its work. The team continues to receive support from some of the more vocal women participants, with whom it has worked, to publicize the need for family violence and child protection services.

Similar discrepancies between collective and individual consent may occur for other practitioners delivering community interventions. They may arise, as they do in this case example, from different perceptions of community members' safety, security and mental health needs (also see reported case studies by Kluttig, Owdenwald, and Hartmann (2009) and Savy and Sawyer (2008)) that link refugees' prior trauma with self injurious and other dangerous behaviour), but they might also result from community representatives' sensitivities about majority culture perceptions of ethnic and religious fundamentalism amongst members of ethnic minorities (e.g., Warne-Smith & Rintoul, 2009). Although not specifically related to mobility, what has become known as the Barrow Alcohol Study (Klausner & Foulks, 1982; Foulks, 1989) is a classic example of a serious disagreement between host community leaders and the researchers over reasons for observed, excessively high levels of dysfunctional behaviour (alcohol abuse) within the community and about which stakeholders' interests would be served by reporting the findings on community dysfunction. The disagreement resulted in repudiation by community leaders of the researchers' methods, findings and social motives (Davidson, 1999a). Balancing the interests of individual service recipients against those of the cultural collective and broader community to which they belong can result in a dilemma for practitioners.

Competing Levels of Responsibility

Practitioners may be confronted not only by the challenge of managing competing ethical responsibilities to recipients and other stakeholders to whom a direct service is provided, but also by a sense of duty to the wider community. At times those wider duties may appear to be incongruous with the practitioner's implied and stated responsibilities to service recipients and other direct stakeholders. Examples of these incongruities are evident in the literature. For example, English, Mussell, Sheather, and Sommerville (2005) reported on a number of medical rights and services issues involving asylum seekers and new settlers to the United Kingdom (UK), weighing up the individual rights of persons with physical illnesses to suitable and appropriate medical treatment against the greater good of, and the risks to, the host community, and against the impacts on the communities of origin of refusing UK residence. Sherr and Farsides (1996) also raised questions about risks of increased levels of HIV infection that might be linked to immigration, arrival of refugees and asylum seekers, and other mobile groups such as military personnel. How practitioners weigh up their responsibilities to service recipients against questions about what is in the best interests of their communities creates an additional level of ethical uncertainty. The danger here is that practitioners may be unduly influenced or restricted by normative false beliefs about, community opposition to, and systemic discrimination against local ethnic minorities and new arrivals (e.g., Davidson, Murray, & Schweitzer, 2008; Every & Augoustinos, 2008; Kushner, 2003; Pedersen, Clarke, Dudgeon, & Griffiths, 2005; Pedersen, Watt, &

Hansen, 2006). Practitioners need to engage critically with legislative and policy perspectives that may influence their practice and should eschew any racial or other forms of systemic discrimination against service recipients individually and collectively. Practitioners also need to bear in mind the power differentials that exist between the cultural majority and culturally different new arrivals when engaging with the latter individuals and groups (Chang & Groves, 2000). How to do so is not an easy question to answer, given the dilemmas discussed above between respect for autonomy vs. beneficence and non-maleficence, and between maintaining the integrity of the service relationship vs. mixing service with advocacy.

Those systemic expectations and pressures are potentially greater in circumstances where practitioners work as employees or consultants for public sector agencies that provide services for, or process, new arrivals. Coffey (2006) has elaborated on the ethical dilemmas that arise in service settings, such as immigration detention centres, which are not conducive environments for providing assessment and treatment services for new arrivals who, in very many instances, have been traumatized by their pre-flight and flight experiences (Ager & Ager, this volume; Miller, this volume). Coffey also examined some of the dilemmas that arise in situations where practitioners provide services for multiple service recipients and/or at the request of third parties, where one of the service recipients is the person being assessed or treated and another is the employing/contracting agency. In the case of immigration detainees, the employing/contracting agency is established or sanctioned by legislation with a mandate to act in the best interests of the host community. Coffey quite reasonably questioned whether practitioners who have ethical and professional responsibilities first and foremost to direct service recipients, i.e., those being assessed or treated, must give undivided loyalty to employers whose job it may be to implement legislation and apply public policy in ways that are supposedly for the greater good. In these circumstances, practitioners need to consider carefully how they might respond when organizational arrangements require them to work under conditions that reduce the effectiveness of service delivery, and they should support the implementation of alternative models of service delivery, such as separating the roles of immigration agency contractors from health contractors who provide the services in agency facilities (Fazel & Silove, 2006; see also, Ager & Ager, this volume). It also means working to ensure equitable access to quality services, as well as developing new models of service delivery to match services to the needs of individuals in those settings (Ager & Ager, this volume; Hernández-Plaza et al., this volume; Kelaher & Manderson, 2000).

Similar conflicts of interest may occur in the conduct of cross-cultural research and other practices where the ethical standards to which practitioners are expected to adhere by research ethics committees, organizational ethics committees, and/or professional associations are totally at odds with local government, local organizational, or community standards. Davidson (1999a) highlighted a number of instances where research was terminated or ended acrimoniously, or should not have proceeded, because researchers were confronted by conflicts between self-imposed

and systemic ethical standards to which western research is expected to adhere and different cultural expectations and standards applied by government agencies and community organizations. Both the delivery and the withdrawal of services, depending on the circumstances, may have equally serious, even fatal, consequences for direct service recipients. In these situations where second-culture bureaucratic and local community expectations are in conflict with established ethical practice standards, practitioners have to find ways of negotiating questions like who should decide which standards have precedence and how disputes about whether a particular aspect of practice is ethical should be resolved. Christakis (1992) suggested that practitioners and other-culture host communities confronted with these dilemmas, instead of seeking to remove the conflict, should seek to negotiate a course of action that allows the service to proceed because it satisfies each of the parties' minimum standards and expectations and sets tolerable expectation about the risks and benefits associated with the service. Such a negotiated outcome would normally involve some modification to the services that were originally sought and/or proposed.

Depending on the nature of the research or professional service, some practitioners will be confronted by the dilemma between acting in the ethical best interests of direct service recipients and acting according to the law. The work of Núñez and Heyman (2007) with undocumented Mexican new settlers to the United States, described above, and research by Cwikel and Hoban (2005) with trafficked sex workers are two recent examples of research contexts where lawful responsibilities as a practitioner and a citizen may directly contravene the practitioner's ethical responsibilities to service recipients or, in certain circumstances, render the service totally impractical. The same dilemma applies in relation to any service that involves working with individuals or groups involved in illicit activity, such as illicit drugs, welfare fraud etc. The dilemma is mainly manifest in three ways. There is the question about whether the practitioner is legally obligated to report illicit activity or has an obligation under workplace policy to report. Legislation and workplace policies requiring mandatory reporting of criminal or other illicit activity, at least in Australia, vary from jurisdiction to jurisdiction; except in very specific instances, practitioners are not legally obliged personally or professionally to report criminal activity (Davidson et al., 2010). Respect for service recipients' autonomy, as it is exercised in the form of rights to privacy and confidentiality, therefore, is the norm rather than the exception. Even if the practitioner is not legally obliged to report illicit activity or if the activity in question is not so morally repugnant as to cause the practitioner as a citizen to report it (e.g. as one might report sexual exploitation of minors even if one is not mandated to do so in one's jurisdiction), there is the question about whether participants' engagement with the service itself exposes them to the risk of detection (see Núñez & Heyman, 2007). Thus, the dilemma between providing a service that on the one hand potentially benefits recipients immediately, or benefits them and others like them in future, or has long-term benefits for the community at large, and on the other increases the risk of immediate harm for participants is apparent. Finally, as Cwikel and Hoban (2005) indicated, in situations where practitioners are working with recipients and

other parties who are both operating outside of the law, reporting illicit activity might not only be impractical or impossible but, at times, might be downright dangerous.

Case Example – Dr S

Dr S works as an organizational psychologist providing consulting advice and organizational research for small scale commercial manufacturing and retail companies. Dr S is contracted by a well-known local clothing manufacturer with the request that she develop some recommendations for improving workplace efficiency. Her initial investigations identify a number of factors that appear to be influencing productivity including, on the negative side, higher than expected absenteeism in the on-site mass cutting department but, on the positive side, efficiencies in the assembly of clothing parts, which is done off-site by contract workers, to whom the factory delivers clothing parts. Outsourcing of the assembly process has been found to be much more cost-efficient than centralized assembly of garments, both on a per unit basis and because of the reduced factory space required. Further investigations reveal that the majority of contract workers who perform the cutting process off-site are from a particular cultural collective and that some of the off-site contract workers appear to be employed in breach of their overseas student and tourist visa conditions; a small number of them appear also to be in high school. In response to further questioning it becomes clear that the large proportion of those whose work status is questionable rely heavily on the income to pay the weekly bills. Dr S has committed herself contractually to a commercial-in-confidence reporting process, but she is concerned about whether her knowledge of, and inaction on, these apparent immigration breaches might affect her licensing as a psychologist and her reputation as an organizational consultant, and she is concerned for the wellbeing of the minors who appear to be working alongside adults on these assembly lines.

Similar issues to those encountered by Dr S may arise for researchers studying new settlement, acculturation, work practices, educational attainment, etc. of ethnic minorities or for research and professional practitioners who, in the course of their work, encounter illicit activity in the sex work, trafficking or migration industries (e.g., Cwikel & Hoban, 2005; Goździak & MacDonnell, 2007; Núñez, & Heyman, 2007). The study by Xin (2005) on work license exchange and rental amongst Chinese rural new settler workers emigrating to live and work in Beijing offers an interesting case example of complicity between local authorities, local law enforcement and new settler workers. Acting in a trustworthy manner to maintain confidentiality may compete with one's sense of lawfulness and the duty to prevent harm occurring to service recipients. I return to this case example in the subsequent discussion of a decision-making model.

Whose Ethics?

Mobility research has highlighted distinctions between the push and pull factors that motivate voluntary and involuntary new settlers to leave their homelands. Not all geographically mobile individuals or groups experience personal safety and security threats or political, cultural, or economic vulnerabilities. At one continuum extreme are individuals and families who flee their homelands within hours of determining that their lives are in grave danger. They often do so with fewer financial resources, less social support, no systemic support, less language training, and less intrinsic motivation on which they can fall back in the resettlement phases. At this end of the mobility continuum, motivation and circumstance may act as indicators of specific psychosocial and mental health needs (Davidson et al., 2008). Voluntary new settlers often attracted by the possibility of improved financial and social opportunities in a chosen host country are at the other end of the mobility continuum.

Two interesting ethical dilemmas emerge from the mobility research literature on the latter groups who are enticed, or eager, to relocate within their country of origin or to another country. The first dilemma emerges from “have” communities and countries that “want more” in the form of trained, qualified professionals. Inducements for trained health professionals from remote rural and low socio-economic communities or countries to relocate to large, higher socio-economic population centres give cause for questioning the morality of providing enticements and incentives that serve further to disadvantage already underserved communities and cultures (Chen & Boufford, 2005; Connell, Zurn, Stilwell, Awases, & Braichet, 2007; Gadit, 2008; Little, 2007). The circumstances of this type of mobility are often that health professionals have been trained in large, higher socio-economic population centres or in overseas countries and are then actively courted by the host community or country to bolster the local workforce (Dauphinee, 2006). The ethical dilemma is one for educators, researchers and other health professionals who, in the course of training, supervision or research services they provide, may not encourage potential new settlers to examine all of the moral ramifications of not remaining in, or returning to practice in, their home communities. The moral debate for host professionals is about beneficence, non-maleficence and justice. The dilemma for potential new settlers is about these *prima facie* duties as well as fidelity (their informal contract with their home community or country) and their own freedom of choice. Questions about “fair, good, or bad for whom” need to be asked, therefore, about the morality of campaigns designed to attract skilled new settlers, as well as about campaigns that are designed to discourage asylum seekers and other undocumented new settlers (Nieuwenhuys & Pécoud, 2007).

There are related ethical concerns arising from local and international mobility of health practitioners where different ethical practice standards exist in different state jurisdictions and in different countries. How might national professional associations and related licensing authorities deal with practitioners’ disparate ethics training when certifying practitioners who have been trained in other cultural contexts? One suggestion put forward occasionally is that ethics needs to be discursive in order to take account of cultural and other contextual differences in professional

values. A more compelling approach is for national professional associations to collaborate in order to develop international standards for professional practice. This approach has received considerable support in recent years (International Federation of Social Workers, 2004; Pettifor, 2007; Sasso, Stievano, Jurado, & Rocco, 2008).

Competing Constructions of Cultural Competence

The concept of culturally competent practice has been explored extensively under the rubric of (a) *knowledge* about service recipients' cultures, including an appreciation of their social and cultural circumstances; (b) *awareness* about one's own attitudes and beliefs about their cultures, and appreciation of the impact of one's practice style on recipients' progress; and (c) *skills* of self-monitoring, communication, and counselling – a framework that reflected ethical debate about and empirical research into the precept (see Davidson, 1999b; LaFromboise, Coleman, & Hernandez, 1991; Ponterotto, Rieger, Barrett, & Sparks, 1994; also, Carr, Chapter 7 this volume). Each of these dimensions of cultural competence can be codified further into specific practices. Fowers and Davidov (2006) have argued that multiculturalism, expressed in terms of cultural competence, is a virtuous pursuit in the Aristotelian sense. The aim of being culturally competent is to bring about good for others, whilst eschewing the negative influences of racism and prejudice. Such competence fosters the virtue of openness to difference and otherness; it underscores the acquisition of practical wisdom, and it extols courage in the form of actions that are designed to bring about fair, just and beneficial outcomes for others. The endgame of analysing culturally competent practice is to: acknowledge value differences between the practitioner and service recipient where values may be incommensurate but equally fundamental and correct; understand social and cultural variations in behaviour; and exploit value conflicts and situational variations that strengthen rather than weaken the alliance between practitioner and recipient. This approach opens the door for prescribing conduct and practices that are universally acceptable and proscribing conduct and practices that are always culturally unacceptable, resulting in standards of practice to which both practitioners and recipients subscribe.

While cultural competence may be defined in different ways and while each definitional approach has its limitations, there is continuing support for the view that cultural competence embodies all three awareness, knowledge, and problem-solving skills dimensions (Sue, Zane, Hall, & Berger, 2009). Those dimensions of competence are articulated succinctly in the American Psychological Association (APA, 2003) guidelines on multicultural practice. Along with the APA (2002) code of ethics they also underscore that Association's ethical standards for research with ethnic minority young people (Fisher et al., 2002). Placing emphasis on the problem-solving skills dimension of cultural competence suggests that practitioners can learn to be culturally competent. Placing emphasis on the cultural knowledge dimension suggests that practitioners, having such knowledge and experience, can

be culturally literate in the recipient's and in their own culture. Culturally literate practitioners with culturally appropriate problem-solving skills are capable of: having culturally appropriate and relevant communications with others; understanding others' needs; selecting suitable interventions to address those needs; selecting and administering culturally sensitive forms of assessment (Ridley, Hill, & Wiese, 2001); and ensuring that appropriate emphasis is placed on individuals in the family and community contexts from which they come. Nevertheless, Sue et al. (2009) acknowledge that the models of cultural competence have focused primarily on the practitioner – recipient dynamic mainly to the exclusion of institutional and systemic factors that influence service delivery. Vera and Speight (2003), in contrast, maintained that culturally competent services alone are insufficient demonstrations of practitioners' social responsibilities. They argued that social responsibility is only fully exercised within a transformational framework that is committed to systemic changes through social policy reform, designed to give greater emphasis to distributive justice than to autonomy, and to emancipate people and communities from social, economic and political oppression. They also argued for the adoption of a broad definition of the term "cultural" to encompass a range of social and lifestyle differences. Vera and Speight's construal of social justice is similar to Prilleltensky's (1997) notion of *emancipatory communitarianism*, and regards social action in the form of advocacy as an essential component of social responsibility (Hernández-Plaza et al., this volume). Prilleltensky (2008) has continued to champion the need for a *transformational* psychology committed to types of research and practice that have the express purpose of changing socio-political structures which perpetuate the iniquitous exercise of political power. All psychological research and practice, according to Prilleltensky, should therefore be *psycho-political*, or power-focused, when it comes to the question of enhancing individual and collective wellbeing.

Ethical Reasoning and Decision Making

Practitioners conducting research with, or providing professional services for, mobile individuals and groups may be confronted in the course of their research or service delivery with a number of ethical dilemmas. There is the question about whether their professional code of ethics provides them with clearly stated and ordered ethical principles as the basis for ethical reasoning and decision-making. Even when the relative stringency of principles is stated, applying those principles in specific circumstances, in which service recipients' autonomy may be further eroded in order to prevent direct harm occurring or effecting some direct benefit, presents as a dilemma. There are often multiple stakeholders to whom the practitioner is answerable ethically and professionally, each of whom may have competing, vested interests in the service outcome. In some instances, there are systemic responsibilities placed on practitioners. Those practitioners must balance responsibilities to direct recipients of their services with responsibilities to employers, third-party payers, and the public at large. In certain situations practitioners may be faced with

the challenge of meeting their ethical responsibilities to direct service recipients at the expense of acting illegally, or disregarding service recipients' illicit activities that are arguably not in the public interest. Finally, being culturally competent may require practitioners not only to demonstrate appropriate, expert knowledge, skills and attitudinal predispositions, but also to embrace a social advocacy role with a view to changing discriminatory laws, policies and practices. The potential for conflicting principles of autonomy, justice, beneficence and non-maleficence and the negative impacts on service recipients of a wrong decision by practitioners are greater in instances when individuals or groups are displaced, their personal safety and security are threatened, or they are politically, socially and economically depowered. How might practitioners chart a way through these ethical dilemmas? The next section will explore a model of ethical reasoning and decision-making that considers ethical duties to be conditional duties and suggests an alternative priority ordering of duties that may assist practitioners to negotiate some of these ethical pitfalls.

Theory of Prima Facie Duty

The theory of *prima facie* duty (Ross, 1930) is offered as a basis for ethical decision-making in service settings where the practitioner has obvious, competing ethical responsibilities such as respect for autonomy, beneficence, non-maleficence and justice toward an individual service recipient, and/or toward service recipients collectively, and/or toward service recipients as well as other parties. Those ethical dilemmas are often present, as we have seen, if one is working with geographically mobile individuals and groups who may be personally, economically, legally or politically vulnerable.

Ross's ethical theory of *prima facie* duty was a reaction against the prevailing ideal and hedonistic utilitarian approaches of his time. It is based on deontological principles, but it differs from Kant's views of perfect duty in a number of ways. *Prima facie* duty theory maintains that "moral intuitions are not principles by the immediate application of which our duty in particular circumstances can be deduced" (Ross, 1939, p. 84). On the contrary, they are *considered* judgments about how one should act in a particular circumstance rather than judgments that are predicated on a fixed priority of ethical principles. It is as a result of this difference that Ross is regarded as an intuitionist (Dancy, 1991). This is not intuitionism in the form of pre-rationalism that Kitchener (1984) described. (Kitchener contrasted *prima facie* duty theory with intuitionism calling the former "principle theory". Her description of the latter may be more correctly labeled "subjectivism", but her theory of conditional duty is akin to Ross's theory of *prima facie* duty.) Second, Ross's theory makes a clear distinction between judgments about rightness and judgments about goodness. He maintained that rightness and wrongness are terms that refer to what we do, and that what we do should be the basis on which ethical judgments should be made. The confusion between goodness and rightness is dispensed with

if a “rigid distinction between [what is] right and [what is] morally good” is maintained (Ross, 1930, p. 156). By clarifying this distinction, Ross’s theory helps us to distinguish between our knowledge of a morally good principle, such as caring for another person, and a wrong act, such as failing to exercise due care for another in a given situation.

Ross regarded moral duties as coextensive and conditional, rather than as duties of perfect obligation. All duties are *prima facie*, meaning they are “conditional” (Ross, 1930, p. 19).

When I am in a situation . . . in which more than one of these *prima facie* duties is incumbent on me, what I have to do is to study the situation as fully as I can until I form the considered opinion (it is never more) that in the circumstances one of them is more incumbent than any other; then I am bound to think that to do this *prima facie* duty is my duty *sans phrase* in the situation (Ross, 1930, p. 19).

Right acts, therefore, are those that are based on a consideration of all of the moral ramifications of acting in such a manner in a particular situation, and which result in discharging in one way or another one’s *prima facie* duties relevant to the situation.

Ross (1930) listed seven conditional duties of fidelity, non-maleficence, beneficence, reparation, justice, gratitude, and self-improvement. To use one of Ross’s often-cited examples of coextension and conditionality,

It may be said that besides the duty of fulfilling promises I have and recognize a duty of relieving distress, and that when it is right to do the latter at the cost of not doing the former, it is not because I think I shall produce more good thereby but because I think it is the duty which is in the circumstances more of a duty. This account surely corresponds much more closely with what we really think in such a situation (Ross, 1930, p. 18).

Notwithstanding, Ross’s theory also offers some indications about the stringency, or priority ordering, of conditional duties. All other things being equal, fidelity, i.e. keeping promises, has primacy over other *prima facie* duties. Ross argued that the consequences of breaking a promise in order to discharge another duty to the person to whom the promise was made, or to other persons, would have to outweigh considerably the consequences of keeping the promise and not discharging those other duties if the former course of action is to be contemplated seriously. Ross also argued, other things being equal, that the duty of non-maleficence, i.e., not causing harm to another, is more of a priority than beneficence, or making a person’s condition better.

In order to discern our actual duty, i.e., how we *will* act, we must apprehend our *prima facie* duties to all parties and the likely consequences of fulfilling those duties in a particular set of circumstances. Then, prior to selecting our course of action, we must consider the consequences of those acts in relation to our other responsibilities and the consequences of fulfilling or not fulfilling them. Not to act in a manner that subsequently fulfills those *prima facie* duties to all parties, by Ross’s account, is wrong. Therefore, a series of acts may be required in order for us to discharge all of our duties in the circumstances.

In Ross's theory, the foundation of any *prima facie* duty is the relationship between the actor and the concerned parties. Therefore, one's duty is determined by one's role *vis a vis* others. For example, one's *prima facie* duty of fidelity resides "in the relation of promisee to promiser" (Ross, 1930, p. 19). Practitioners' *prima facie* duties have as their foundation the morally significant relationship in which service recipients stand to them. In this respect Ross's theoretical framework focuses attention on the quality of service provider – recipient relationships. It is therefore an approach that requires practitioners to apprehend their conditional duties and contemplate their actual duties in respect to each service into which they enter or in which they are implicated, whether the situation presents the practitioner with ethical dilemmas or not. Those duties might be implied in the psychological contract (Schalk & Roe, 2007) between practitioners and service recipients or they may be stated explicitly in the research and other service agreements that practitioners negotiate individually or collectively with service recipients.

Davidson (2006) has suggested a step-wise system of ethical reasoning incorporating Ross's theory of *prima facie* duty. The first step involves an analysis of one's implicit and explicit promises toward direct service recipients. Implicit promises are inherent in the practitioner's psychological contract with the service recipient and explicit promises are contained in the service contract or agreement. Other ethical responsibilities to those recipients are then identified. Promises and other ethical responsibilities to other parties are identified. Fulfillment of specific ethical responsibilities to a party at the expense of not fulfilling another responsibility to that party or to other parties is then considered in the immediate circumstance and a decision about how to proceed is made, keeping in mind that fidelity (keeping promises) is a more stringent responsibility than non-maleficence, which takes priority over beneficence. Where the practitioner is unable to discharge a responsibility to a party, the responsibility is simply not negated but reparation must be made in order for it to be discharged. Davidson (1999a, 2006) argued that this approach to ethical decision-making, in which responsibilities can never be duties of perfect obligation, is equally valid for research and professional practice; has clear advantages over virtue, utilitarian, and discourse theories of ethics; and is not incompatible with professional models of ethical decision-making that incorporate an assessment of the legal and professional issues relevant to the circumstances and knowledge of relevant professional codes of conduct.

The initial implication of applying Ross's theory of *prima facie* duty is that practitioners must be extremely careful to clarify the specific promises they make to all parties to a service and also to clarify what others may wish of the practitioner. Practitioners should not make promises they are unlikely to be able to keep or condone misimpressions of what they are able to deliver (see Cwikel & Hoban, 2005). Not to keep a promise is a wrong act and, therefore, is unethical.

In the case example above of the organizational psychologist, Dr S, the practitioner may avoid the ethical dilemma between maintaining commercial-in-confidence commitments, acting lawfully and exercising a duty of care to school age employees if, before commencing the service she has an accurate understanding of the ethical and legal limits of confidentiality, including legal requirements to report

alleged criminal activity and suspected child exploitation (Davidson et al., 2010). Accurate knowledge of these issues should assist in drafting a commercial-in-confidence agreement with specified limits placed on confidentiality and a detailed statement of responsibilities to the company and to individual employees and other stakeholders to whom she owes a duty of care. Mechanisms for resolving issues arising from conflicting responsibilities to the various parties to the service and from differing perceptions of parties' interests and findings should also be specified in the contract. The "game plan" should be one of "no surprises", so that considered action results in the fulfillment of responsibilities to all stakeholders. Similar, careful contractual engagement is required between Dr N's team of doctoral researchers and the local community organization and individual women refugees involved in the social inclusion program. Although in that situation Dr N's team could possibly continue its work with the support of women participants if its agreement with the organization breaks down, the research team will need to be aware of possible future risks of harm to women who continue to collaborate with the researchers; therefore, there should be a duty of care clause as a reason for discontinuing the program in research agreements with individual participants.

Professional Development and Self Care

A variety of approaches to ethics education and training of health practitioners can be found in the research literature, including informal, vicarious supervision, formal training in moral philosophy, case study, role play, and code-based training (Davidson, Garton, & Joyce, 2003). Except for the informal approach, all of the other approaches have been shown empirically to improve trainees' ethical knowledge and reasoning, although there is evidence that interactive approaches such as critical incident analysis and role play are more effective, and perceived by students as such, than didactic approaches (Pettifor, Estay, & Paquet, 2002). Approaches that combine some formal education in the philosophical underpinnings of ethical reasoning with code-based education and/or experiential approaches involving critical incident and case analysis or role play have been shown to be more effective than lecture-only and code-based-only approaches (Davidson et al., 2003); these hybrid models are suggested in situations where practitioners are seeking further training and professional development in professional and research ethics.

However, Ross's (1930) *prima facie* duty theory imposes an additional, vitally important constraint on ethical reasoning and decision, which is not readily resolved in the context of critical incident and case analysis or role play. It has to do with the requirement that "what I have to do is to study the situation as fully as I can until I form the considered opinion (it is never more) that in the circumstances one of them is more incumbent than any other" (Ross, 1930, p. 19). In order to decide on the ethical course of action, practitioners require a more detailed appreciation of "the circumstances" than is normally offered in an ethical vignette or critical incident analysis. They require detailed knowledge of the expectations held by all parties to

a service and the exact nature of the promises they have made to those parties. They must also be skillful in applying a comprehensive model of ethical decision-making that accounts for the nature of any issues or dilemmas, their ethical code of research or practice, related ethical guidelines and advice statements, legal and organizational responsibilities and, finally, scholarly accounts of related dilemmas. First and foremost, practitioners who conduct research or provide professional services in situations where ethical dilemmas are likely to arise on a regular basis should establish and maintain professional supervision relationships with other experienced, senior practitioners who are suitably qualified to offer independent opinions on the dilemmas confronting the practitioner and the latter's proposed course of action. Although professional practitioners are normally expected to establish and maintain professional supervision relationships (e.g., see Australian Psychological Society, 2007), this is normally not a core requirement for research ethics approval. Researchers working with mobile individuals and groups and, in particular, with research participants who may be at risk of harm as a result of their political, social or economic circumstances, are strongly advised to seek peer supervision from an experienced, independent senior researcher.

Despite the best efforts of practitioners to improve ethical decision-making in the context of their particular aspect of practice, and maintain peer supervision relationships, there is still the prospect of practitioners being distressed when they witness recipients of their services being harmed or being at risk of harm by other parties. That distress may take a number of forms. Practitioners may experience distressing thoughts and accompanying emotional reactions that arise in situations where they know what the right thing to do is but where they are constrained or coerced into following a less right course of action, i.e., they are compelled legally, professionally, politically or financially to their own detriment psychologically into acts or omissions that they consider unethical or immoral. This type of distress, known in the literature as ethical or moral distress (Jameton, 1984), has been examined extensively in other areas of health and medicine but is only just starting to be recognised as a source of distress for psychologists. It is a relatively unexplored concept in research. The symptoms associated with ethical distress include anger, frustration, guilt, depression, anxiety, intrusive thoughts and dreams, sadness, or a sense of worthlessness or helplessness. Recent research into ethical distress suggests, if distress symptoms are carefully managed, that mastery of the distress may lead to a sense of empowerment and moral growth (Hanna, 2004).

Repeated experiences of ethical distress may result in emotional exhaustion, commonly known as burnout. However, burnout may also be a consequence of overwork or of engaging in emotionally taxing work over a long period of time. Symptoms of burnout include perceived lack of control over one's workload, a sense of helplessness or hopelessness, physical exhaustion, irritability with clients and colleagues, objectification of work relationships, reduced work satisfaction, and body pains. Both ethical distress and emotional exhaustion have been associated with job dissatisfaction and reduced workforce retention.

If distress symptoms of ethical distress are not managed successfully, practitioners may enter a second, reactive distress phase in which the emotional, other

psychological, personal or professional consequences of distress are exacerbated. According to Ross's *prima facie* duty theory, the unfulfilled duty causing the distress still remains. It does not cease to be a duty simply because one is prevented from acting ethically in the circumstance. Taking steps to make amends for not fulfilling a duty may relieve distress symptoms.

Case Example – Dr X

Dr X has entered Australia on a visiting scholar's visa. He is conducting research with newly-arrived refugees and asylum seekers funded in part by a fellowship given to him to conduct a comparative study of the impacts of refugee processing schemes on refugee wellbeing in his own country and Australia. The obvious major difference between the two systems at the time of his work is that all unscheduled new arrivals in Australia must undergo mandatory detention in an immigration detention facility while their claims for asylum receive an initial assessment, after which claimants may be awarded a temporary residence visa while further assessment of their claims occurs – or be deported.¹ In the course of his clinical work with temporary visa holders, Dr X assesses an asylum seeker (A) who, in his professional opinion, has been severely traumatized prior to and after fleeing a local armed conflict in A's country of origin, including the experience of mandatory immigration detention. These traumatic experiences have precipitated a number of psychotic episodes during which A was judged to be at serious risk of harming himself or others. A carefully planned medication regime and cognitive intervention have been successful in bringing about symptom reduction; however, A is assessed as being at high risk of relapse if the therapeutic interventions are removed. Dr X becomes aware that A's application for a humanitarian visa has been rejected and that A is to be deported pending an appeal of the decision. He is aware that A will not receive the level of care required if A is returned to his country of origin, and Dr X notices a significant deterioration in A's mental state following receipt of the tribunal decision. Along with some other concerned professionals, with A's permission Dr X advocates on A's behalf with immigration officials for a reversal of the decision, to be informed that he may be overstepping his visa conditions and possibly violating his fellowship agreement. Dr X is very distressed not only by the decision meted out to A but also by the bureaucratic and legal limits on the influence he is able to have as a professional acting in the best interests of his clients.

¹Australian immigration policy and legislation relating to universal mandatory immigration detention was altered in 2008 to make mandatory detention a last resort in cases of unauthorized persons who represent a health, identity, safety or security risk or who repeatedly violate their visa conditions.

There are various other strategies for managing ethical distress, which include on-going peer supervision with an experienced senior practitioner, sound knowledge of relevant codes of ethics and practice, and skillful use of a comprehensive model of ethical decision-making. Practitioners for whom ethical distress is a real possibility need to develop skills for self-monitoring; they need to examine their own personal values; they need to build and maintain a supportive network of collegiate relationships; and they may need to seek personal therapy. Dr X successfully resolved his ethical distress by studying the code of ethics, consulting with an experienced, senior colleague, and analyzing his motives for engaging in direct advocacy that was beyond the original clinical research service offered to the client.

Symptoms of burnout may be relieved by careful examination of one's personal values, finding a balance between work and other activities, fostering collegiate relationships, taking vacations, valuing friends and family support networks and personal therapy. Similar etiologies, symptoms and management strategies are apparent where practitioners may be traumatized vicariously by hearing service recipients' accounts of their ordeals or where the practitioner is vulnerable to counter-transference with vulnerable recipients (Freed, 2005; Thompson, 2003).

Conclusion

Practitioners who conduct research with, or provide professional services for, mobile individuals and groups are likely to encounter ethical dilemmas that arise from their competing ethical duties to direct recipients of their research or professional services and/or to other parties to their work. They may encounter circumstances where their ethical duties are in conflict with the law, or with organizational policy, or with the codes of ethics or practice by which they are bound professionally, or with public interest. They may be tested by the tension that exists from time to time between being a competent practitioner and being a social advocate. In these circumstances it is important that practitioners: have a detailed appreciation of the ethical issues with which they are likely to be confronted; have recourse to a comprehensive model of ethical reasoning and decision-making for managing competing ethical duties; are experienced practitioners of the model; seek peer supervision from an experienced, senior practitioner; recognize the symptoms of distress they may experience when working with at-risk individuals and groups; and deal effectively with their own symptoms of distress. Practitioners at all times should bear in mind that "success and failure [to fulfill an ethical duty] are the only test, and a sufficient test, of the performance of a duty" (Ross, 1930, p. 45).

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Part II

Motives

Chapter 5

Mobility and Personality

Irene Hanson Frieze and Man Yu Li

Abstract Although economic factors are a key factor in decisions to emigrate to another region, there are always some individuals who chose not to leave. Others might emigrate even when conditions they are leaving are quite good. In this chapter, we argue that there are a number of personality factors related to new settlement decisions. Some aspects of personality, such as achievement motivation and power motivation, appear to relate to wanting to leave, especially if conditions are bad. Other personality factors, such as affiliation motivation, predict place attachment, or wanting to stay. Empirical research has demonstrated support for these conclusions, both in predicting emigration to another country and to other regions within a country.

We further argue that the same types of personality factors may relate to more temporary moves. Thus, underlying motivations may relate to seeking study abroad programs or other forms of mobility that are not intended to be permanent moves. Another form of mobility that has received little attention in psychological studies is leisure travel. This too may relate to underlying personality factors such as motivations of various types.

Just as personality may relate to mobility, it may also predict the decisions made about where to go. If lack of satisfaction of basic motivations is the underlying cause for migration, people will seek a location that they believe will allow more satisfaction of these motives. If the relevant motivation is affiliation, people will seek locations where other family members or friends live.

We conclude by discussing some of the implications of these ideas about the mobile personality. In order to better understand new settlers, it is important to clarify what factors led to their emigration, and what motives they seek to better satisfy.

Keywords Geographic mobility · Personality · Travel · New settlement

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A number of studies have indicated that some individuals have a strong sense of attachment to a particular region or area and are reluctant to move to another location, regardless of how bad their situation there becomes (e.g., Frieze, Hansen, & Boneva, 2006). Others are dissatisfied with their situation and seek opportunities to leave, even when others are content to stay (Carr, Chapter 7, this volume; Inkson & Thorn, this volume). This latter group has been described as having a “migrant personality” (e.g., Boneva & Frieze, 2001). As others have noted (Tartakovsky & Schwartz, 2001), deficiency models that argue it is the most desperate individuals who leave for another region have not received strong empirical support. Geographically mobile individuals are often found to have *higher* levels of skills or education than those who have decided not to leave, even when conditions are quite bad in the home region (Boneva & Frieze, 2001; Tartakovsky & Schwartz, 2001). Thus, it does appear that if we want to understand individual mobility choices, we need to analyze the underlying personality of the person.

In this chapter, we review studies about the characteristics of those who want to move to another region or who actually do so, and argue that these characteristics form what might be labeled as forming a “mobile personality.” We also analyze those who might be described as having a non-mobile personality, or as having a strong place attachment. This term draws on studies of those who do and do not move from one country to another as well as studies of “internal migration,” within a region or country. As others have noted (e.g., Whitfield, Zhu, Heath, & Martin, 2005), very similar decision-making may occur in the decision to move to another country or to another region of a large country such as the United States or Australia. We also look briefly at sojourners who leave one region and move to another with the expectation of a relatively brief stay, to achieve educational or training goals, for example, and at people who like to travel for vacation or leisure. We argue that the same types of personality factors may be associated with all of these types of mobility.

The Mobile Personality

One of the common characteristics among those who desire to “emigrate” or who have actually moved from one region to another is that they are dissatisfied with their present location (Boneva & Frieze, 2001; Silventoinen et al., 2007; Tartakovsky & Schwartz, 2001). As we discuss below, this dissatisfaction can have many sources. An important source may be based on frustration of basic motives. We argue that wanting to change one’s life to better satisfy basic motives underlies many decisions about mobility.

Motivation and the Mobile Personality

According to McClelland (1987), a major motivation theorist, three basic motives that drive human behavior are achievement motivation, affiliation motivation, and power motivation. Evidence has been found that each of these may be related to

mobility, although in different ways. We suspect that other basic motives are also involved, although we are not aware of strong empirical support for other motives. As will be discussed later on in the chapter, both achievement and power motivation appear to be especially associated with the mobile personality. The role of affiliation motivation is more complex, but is often correlated positively with place attachment or negatively with mobile personality.

Achievement Motivation

Achievement motivation is the desire to do things well, work hard, and compete with others, and has been associated with economic success both in the individual and for entire regions with high concentrations of those with high achievement motivation (McClelland, 1961, 1987). People who have higher achievement motivation are more likely to have a stronger belief in their own abilities and are more likely to work harder after failure; starting one's own business or other entrepreneurial activities are also associated with achievement motivation (McClelland, 1987). They are also believed to be "more restless and avoid routine" (McClelland, 1987, p. 249). Therefore, they may also be more innovative and may more actively seek out information that can help them do things better or give them information about where they will move.

Some of the earliest research on the "migrant" personality looked at the role of achievement motivation, and many studies have supported the theory that achievement motivation is a predictor of actual mobility and of desires to move from one place to another. For example, Matter (1977) found that during periods of economic decline and stability (but not during periods of economic improvement), overall levels of achievement motivation were lower among those remaining in the community than for those who left the same community. These data were interpreted by Matter as indicating that those with higher levels of achievement motivation left for better opportunities when the community was declining. The assumption was that when a region is suffering economically, there are relatively few opportunities for the satisfaction of achievement motivation through work or entrepreneurial activities.

Other research also supports an association between achievement motivation and movement into a new country. High levels of achievement motivation have been associated with Japanese new settlers into the United States (Caudill & DeVos, 1956) and Korean (DeVos, 1983). Others have found supporting evidence of a relationship between mobility into the U.S. specifically higher levels of achievement motivation among Mexican new settlers (Suarez-Orozco & Suarez-Orozco, 1995), and also among students intending to leave Jamaica (Tidrick, 1971).

Building on these ideas, Frieze and her colleagues have looked at outward mobility desires in a large sample of Central and Eastern European university students. Surveys of students in this region included a question about where they wanted to live the majority of their adult lives. Those who indicated that they wanted to live in another country were classified as having "emigration desires," and were

compared to those wanting to live in the same region where they were studying. During the early and mid-1990s, when these regions were in economic decline as they moved from state-sponsored economies to market economies, higher levels of achievement motivation were found in those wanting to leave these relatively economically depressed areas than those who wanted to stay (Boneva et al., 1997; Boneva, 1998). However, in a later sample from these same regions, as well as from Russia, another formerly socialist country, achievement motivation levels alone did not predict “emigration desires” (Frieze et al., 2004). Instead, an interaction between achievement motivation and work centrality was significant. This was interpreted as indicating that only those high in both achievement motivation and work centrality were interested in outward mobility at this time. Such an interpretation is consistent with the motive frustration theory of mobility desires. If we assume that there were ways to satisfy achievement motivation through non-work activities in the original region, there would be no desire for outward mobility. We are suggesting that those high in work centrality are the most likely to want to move away for economic reasons if they also have high achievement motivation. As we discuss later, the interaction of power motivation and work centrality may also be predictive of desires to emigrate. Since the pattern of international mobility is so often from economically disadvantaged regions to countries where there are many relatively high paying jobs, it appears that frustrated achievement motivation and high work centrality may be one of the most common forms of the mobile personality (Boneva et al., 1997, 1998).

We have also looked at personality factors in internal new settlement desires within the United States. We have been asking college students about their desires to move from Pittsburgh, a region of low economic growth, to other parts of the United States, using the same question about where they ideally wanted to live most of their adult lives. Data were collected in most years starting from 1991 and ending in 2004. In analyzing these data, comparing those who wanted to leave with those who did not, we found no significant difference in achievement motivation between the groups. This might be explained by the fact that sports participation or hobbies or playing Internet games would all be possible outlets for the expression of achievement motivation. Such activities would be available in Pittsburgh just as well as other regions of the United States.

Power Motivation

In addition to frustrated achievement motivation creating a push factor in desires to emigrate, our research has suggested that power motivation appears to be another important motivation related to desires to emigrate. The power motive is associated with desires to take on leadership roles, and a concern with having control over others or with being able to impact the lives of others. Those high in power motivation tend to be risk takers (McAdams, 1988; McClelland, 1987). They also tend to seek prestige, behave so they will be recognized in groups (McClelland, 1987), and make themselves known to other people (Winter, 1973). However, they have

also been found to be associated with more aggressive acts and more assertive and negative self-views (McClelland, 1987; Winter, 1973).

As with achievement motivation, in regions suffering economic problems, those with high power motivation may feel that they are not able to express this motivation in their lives, especially if they also place a high value on work (Frieze et al., 2004). In regions with many work opportunities, management and government jobs are often chosen by those with high power motivation. Power motivation also tends to be high in professions that allow one to impact others through helping. Such jobs would include clergy and therapists of all types (Frieze & Boneva, 2001; Winter, 1973, 1993). When such jobs are not available or are extremely difficult to obtain, power motivation is frustrated, and people high in this motive may seek to move to another region where their power motivation can be more easily expressed.

This hypothesized association of power motivation with international mobility desires has been tested in a series of studies using samples of university students in Central and Eastern Europe during the period of transition from communist economies to market economies described earlier (Boneva et al., 1997, 1998; Frieze et al., 2004) as well as in studies of place attachment in U.S. students (Frieze et al., 2006). These studies have provided some empirical support for the ideas. In the 2004 study (Frieze et al., 2004), power was found to be a more important predictor of international mobility desires than achievement motivation.

Affiliation Motivation

The third of McClelland's three basic motives is affiliation motivation. This is defined as the desire to form and maintain relationships with other people. Those high in affiliation motivation are unhappy when separated from friends and family. People with high affiliation motivation perform better when affiliative incentives are given for performance. For example, high affiliation motivation students perform better when teachers are warm and friendly (McClelland, 1987). High affiliation motivation people are also quicker in acquiring social relationships. They put more effort into maintaining social networks, such as visiting their friends more often (McClelland, 1987; Wong & Csikszentmihalyi, 1991). They are found to be more cooperative, tend to avoid conflict and are more likely to conform. Finally they are also found to have more fear of rejection, and in spite of their strong desire to have friends, they are not necessarily popular or successful in connecting with other people (McClelland, 1987).

In general, we argue that mobility decisions are related in a negative way to affiliation motivation, such that those who are high in affiliation motivation would be *less* interested in wanting to move to another region than those low in this motive (Carr, Chapter 7, this volume). We see high affiliation motivation as also being related to place attachment, a concept discussed below.

Empirical support for these expected relationships between new settlement desires and affiliation motivation have been mixed. Ali and Toner (2001), comparing women who immigrated into Canada with a comparison group of women who

remained in their Caribbean homes, found that those who had left placed a lower value on their interpersonal relationships. This is consistent with the idea of lower affiliation motivation in those who are more mobile. Also, data collected from Albanian college students in 1996 indicated that men with high affiliation motivation had less interest in emigrating from Albania than men with low affiliation motivation, but there was no effect of affiliation motivation for women (Boneva et al., 1998). A similar finding, of feeling that their affiliative needs were not being met in their present location being related to intentions to want to move, was reported by DeJong (2000) for men in Thailand, but not for women. If this gender difference continues to replicate in other studies, it may suggest that affiliative needs are related in complex ways to gender roles and mobility and that men and women need to be considered separately in such studies.

One reason that theories related to affiliation may not be supported in recent studies is that mobility, even to another country, may not strongly disrupt relationships with friends and family. Owusu (2003) finds that recent new settlers into Canada from Africa are able to use electronic means to stay in touch with family and friends from the home region. This may suggest that place attachment and affiliation motivation may become less important as inhibitors to human mobility in future years.

Place Attachment

Place attachment has been identified as a psychological involvement associated with the home and region in which one lives (Gustafson, 2001; Low & Altman, 1994). Place attachment is quite common. It is assumed to be predictive of wanting to stay in a particular region rather than wanting to move away from it (e.g., Gustafson, 2001). One of the first studies of place attachment was done by Low and Altman (1994). Although much of this work has focused on why certain types of environments are seen as more desirable, with many having strong feelings of attachment to a particular location (e.g., Kyle, Mowen, & Tarrant, 2004; Low & Altman, 1994), there are always individual differences among those in desirable and less desirable areas. Thus, like desires to be mobile, place attachment can be seen as a function of the person as well as of the environment (Frieze et al., 2006). It is assumed that those who are less attached would be most likely to want to leave (van Ecke, 2005).

It is not difficult to find evidence that people tend to feel more comfortable and secure in familiar locations (Manzo, 2003; Schumacher & Taylor, 1983). Those with especially strong place attachments are likely to feel “homesick” when away (Fisher, 1989). Attachment to home is often based on feelings of closeness to family and friends, but can also extend to an emotional tie to the actual physical environment (McAndrew, 1998). Such ties may be so strong that people refuse to relocate, even when faced with losing their jobs (Turban, Campion, & Eyring, 1992).

A study of place attachment among students at the University of Pittsburgh indicated that about a third of the students desired to live their adult lives in the

Pittsburgh area (Frieze et al., 2006). Thus, a relatively high proportion of this young adult sample would be classified as having place attachment. This high place attachment group was more often female than male. They were also characterized by being more likely to feel that their family was central to them, while they scored lower on work centrality. Place attachment was also associated with higher levels of affiliation motivation, a desire to have many friends and placing a high value on establishing and maintaining relationships with others. Place attachment among this student group was also higher for women who wanted more children than for women wanting fewer children. However, desires for children did not predict place attachment in men.

Deciding Where and When to Go

An important question that arises once someone has decided that he or she wants to relocate and move to another region within the country, or even to another country, is where to go. We argue that this choice will depend on many factors. As with place attachment, some locations are generally more desirable than others, both because they offer many positive features, and also because they are more welcoming of incoming new settlers (Dovidio & Esses, 2001). People do appear to seek a particular area within the new region that fits their sense of place. Thus, people who feel more at home in urban areas choose to live in the city in their new home, while others may choose to live outside the city (Feldman, 1990). Like place attachment, however, the choice is also dependent on the motivations and desires of the individual (Fawcett, 1985). Settlers into a new country are seeking a “better” life (Van der Veer, Ommundsen, Krumov, Van Le, & Larsen, 2008), but each individual defines “better” in his or her unique way. Those seeking better work opportunities might make very different choices than those wanting to reunite with family. Jokela, Elovainio, Kivimäki, and Keltkangas-Järvinen (2008) have found that people who are more sociable are more likely than others to move from a less to a more urban area. In general, settlers into a new country appear to be more likely to move to large cities (e.g., Hyndman, Schuurman, & Fiedler, 2006), possibly because there are more opportunities for motive satisfaction in larger urban areas.

Although, generally, people do act on their intentions or desires (Ajzen, 1991; Perugini & Conner, 2000), there is also data indicating that there is not always a direct relationship between stated desires to move and actually doing so (Lu, 1999). For example, Lu found that younger individuals were more likely to act on their desires to move than older individuals, and that renters were more likely to follow through on planned moves than homeowners. These data may suggest that those with more obligations and perhaps with more highly developed place attachments had stronger barriers to overcome in leaving.

There may also be gender differences in motives for international mobility, although we have found no gender differences in predictors of international mobility decisions in our own work. We do often find that men and women differ on some of the predictors of general mobility desires, though. For example, in our sample of

Pittsburgh students wanting to stay or leave Pittsburgh, Frieze et al. (2006) found that men were higher in achievement motivation and work centrality than women, and women were higher in affiliation motivation. These types of gender differences might lead to men being more likely overall to move internationally, as was the case in this sample. Derwing and Krahn (2008) found that the large majority of a sample of primarily women new settlers into Alberta, Canada, came because of family and friends telling them about it. About a third cited economic reasons for coming and about the same percentage mentioned joining family and friends as a factor. Within the sample, women were relatively more likely to mention family and friends while men more often mentioned economic reasons to come to this economically successful region.

Reasons for new settlement may relate to adaptation in the region where people have relocated. Our analysis would suggest that these relationships would be complex and that adaptation would relate not only to reasons for relocating, but also to whether or not the new home provides opportunities for satisfaction of the motives that drove the initial mobility decision.

Temporary Mobility: Sojourners and Enjoyment of Leisure Travel

Some of the ideas presented in this chapter about the mobile personality may also apply to temporary travelers of all kinds. Diverse areas of research have examined many types of people who move or travel from one area to another. This would include sojourners, tourists and seasonal workers. Others who travel are the elderly who move from one region of the country and then back as the seasons change and those with second homes. It has been suggested that even those who travel to conferences or conventions might share some common personality characteristics with people who relocate more permanently to another country (Bell & Ward, 2000).

Sojourners are defined as people who live at least 6 months in a foreign country (Church, 1982). There are many reasons that people may choose a brief move. For example, sojourners can be business managers, international students, tourists, missionaries, or military staff (Berlin & David, 1971). Different kinds of sojourners are believed to be very different, especially in their perception of and involvement with the host culture (Navara & James, 2002). For example, Navara and James (2002) suggested that students may be on one end of wanting to become involved with the host culture, while military personnel may have no contact with the host culture at all. The abundant financial resources of business managers may make them different than other groups of sojourners and may mean that they have less involvement with the host culture and have more opportunities to continue ties with friends and family in the area they have left.

People who enjoy leisure travel to different regions might also share some of the characteristics of those who move internationally more permanently. Studies segmenting tourism motivation point to the same basic motives that were discussed

in the beginning of the chapter as motivating some tourism. For example, Dann (1977) argued that people travel because they are frustrated about the “anomie society” (p. 187) or any situations in their homes that are unsatisfactory. This acts as a push factor for people to seek what they cannot achieve in their home. Economic instability or even their unfulfilled needs of social interaction could motivate them to travel away from their perceived “anomie society”. Dann also argued that in order to fulfill their need to be recognized or the need for higher status, people may use travel as a strategy for ego-enhancement, which is a characteristic of those high in power motivation.

In an interview study, Crompton (1979) reported that participants expressed the idea of wanting to escape from their mundane environment, regardless of the living environment of their home places, to fulfill their need to achieve. In the same study, interviewees also showed high power motivation when they reported that traveling helps them gain prestige, although this motivation fades away as they travel more. They also reported wanting to explore their self, which may be a characteristic of power or achievement motivation. Interviewees also expressed using leisure travel to enhance kinship relationships or facilitate social interaction, a way to fulfill affiliation motivation.

Other studies also find evidence for the motivations underlying various types of new settlement or travel discussed earlier. Although researchers often associate achievement needs and desires for better employment with permanent settlement into another country or region, Bell and Ward (2000) argue that this is not necessarily true. Short-term travel for business or travel for seasonal work is clearly work-related. Studies of tourists conducted in Kenya (Beh & Bruyere, 2007), Japan (Sangpikul, 2008) and the Philippines (de Guzman, Leones, Tapia, Wong, & de Castro, 2006) have identified motivations such as ego-enhancement, personal growth, rest and relaxation, socialization and family togetherness, novelty seeking, escaping and learning. McHugh and Mings (1996) suggest that the need for autonomy is a strong reason for the elderly to move from their homes to a different region on a seasonal basis. By doing this, they are less dependent on their children. This desire for autonomy is associated with power motivation in theoretical research (McClelland, 1975). Werker and Ahmed (2008) discuss the many challenges experienced by those with strong altruistic desires who work in NGOs in very difficult environments. This desire to help others is associated with power motivation (Frieze & Boneva, 2001).

Motivations to travel do not necessarily mean that people are low in place attachment. In an interview study, Gustafson (2001) found that people who like to travel see this as interesting and exciting. It appears that they like learning new things, a characteristic of those with high achievement motivation. The idea of seeing things from a new perspective was also mentioned in the interviews. This might well be something that would be of interest to those with high power motivation. The same respondent said that living in one place and never moving “was for those who knew their place, literally as well as metaphorically. They were satisfied with what they had. . .” (Gustafson, 2001, pp. 675–676). Several of the interviewees in this study reported that they had a strong attachment to their homes and where they lived, but

they also found that travel to other regions was interesting. Such individuals might be high in achievement, power, *and* affiliation motivation, or, as McHugh and Mings (1996) suggest temporary mobility or travel may be a way of satisfying needs that are not being met in the home area, without having to disrupt feelings of strong place attachment.

There appears to be a growing consensus that some of the same factors underlie all types of travel or more permanent forms of mobility, global and regional (Bell & Ward, 2000; McHugh & Mings, 1996). Although sojourners are seen as moving from one region to another to achieve temporary goals, many people who are later classified as “immigrants” and who end up remaining in their “migrant” destination as new settlers, came originally as sojourners (Gans, 1999). This would further support our suggestion that some of the personality factors associated with desires for the relatively durable forms of mobility may also be found in at least some types of sojourners.

We are not assuming that all those who travel do so to satisfy unfulfilled achievement, power or affiliation motivation. If students go to study in another region at the insistence of their parents rather than out of personal choice, they would not necessarily demonstrate a mobile personality, since they might have quite different motives for moving to another region (Chirkov, Vansteenkiste, Tao, & Lynch, 2007). Although Chirkov and his colleagues focus on the desires of the student to become involved with the culture of the host location, we would argue that another major concern in analyzing why students move to a new region is what they hope to accomplish in the host location. A number of studies have indicated that the type of acculturation motive affects the adjustment of foreign students (Coelho, 1958; Kim, 2001; Selltiz & Cook, 1962; Selltiz, Crist, Havel, & Cook, 1963), but to our knowledge the basic motivation for moving has not been directly examined in these studies.

Policy and Research Implications

Personality and Mobility

We have presented one type of theoretical framework for looking at mobility and place attachment. Others have investigated other types of underlying personality factors. Some people appear to simply desire change and have been found to be likely to make major moves more than once in their lives (Jennings, 1970; Jokela et al., 2008). Although this personality characteristic has not been well studied, it appears to relate more to a desire for new experiences than to frustration of basic motives. Of course, this desire is associated with achievement motivation.

Another widely studied personality characteristic that may be related to this desire for change is sensation seeking. This is defined as the preference for changing, new and intense sensational experiences (Zuckerman, 1994). It also refers to people’s disposition to expose themselves to risks, such as physical, financial and

social risks in order to gain the experiences. Sensation seeking has been associated with people who move from high income locations (van Dalen & Henkens, 2007), an atypical form of mobility since this involves moving from a highly desirable region. Such movement is not easily attributed to achievement, power, or affiliation motivation and appears to have a different underlying basis. We further suggest that this desire for change may lead to a desire for recreational travel in those with strong place attachment, although we can find no empirical studies that have examined this question.

Using Schwartz's (1994) theory of basic human values, Tartakovsky and Schwartz (2001) have found that potential new settlers into Russia were motivated by one or more of three basic types of values. The first value they labeled "preservation"; this variable included concerns about the situation in Russia as well as desires to be reunited with family. The second value was "self-development", which appeared to have many of the elements that would be associated with achievement motivation, such as interests in another culture or looking for new academic opportunities. The third value was "materialism", which was associated with wanting a better financial situation. Further research is needed to determine if these values can be mapped onto the motivational framework presented in this chapter; or if these represent additional basic motivations for mobility.

In looking at internal mobility within Finland, Jokela and his colleagues (Jokela et al., 2008) found that those who were more sociable were more likely to relocate to urban areas, while less sociable individuals tended to move to rural areas. They also reported that those higher in activity levels were more likely to move, independently of the region selected. These characteristics are not clearly related to the motivational analysis developed in this chapter, although higher levels of activity have been related to achievement motivation (McClelland, 1987). It is clear that personality factors underlying mobility are complex, and need more study.

In another study that attempted to use mathematical techniques to identify different underlying personality factors for mobility, Jackson et al. (2005), in a sample of those who had emigrated from New Zealand, identified many of the same types of factors discussed earlier. One important factor that served to link people to home was ties with friends and family. Career and economic concerns were more related to reasons for leaving New Zealand. As Jackson and his colleagues noted, if New Zealand wants to bring some of the highly skilled expatriated New Zealanders back home, they will have to find ways to better satisfy these career needs as well as affiliation needs.

Adaptation and Mobility

A major policy concern for those who work with mobile people of all types, from sojourners to new settlers into a host country or society is how well these individuals adapt to their new environment. There appear to be many sources of stress for these people, especially those who move from one country to another. One is discrimination by the native-born population (e.g., Dovidio & Esses, 2001; Hallak

& Quina, 2004). Another is that changes in lifestyle may lead to changes in gender roles and in the relations between the husband and wife (e.g., Parrado, Flippen, McQuiston, 2005). Some of these sojourner studies assume that sojourners generally go through a universal process of adaptation, regardless of their personality or motivation for coming (e.g. Berry, this volume; Furnham, this volume; Hammer, 1992; James, Hunsley, Navara, & Alles, 2004; Tsai, 1995). However, these studies do recognize some factors associated with sojourners' adaptation, such as marital satisfaction with their partners (James et al., 2004), attitudes towards the host culture (Tsai, 1995), interpersonal competence and prejudice experienced (Kuo & Roysircar, 2006).

An often-cited statistic is that it is not unusual for new settlers to be economically successful in their new home. This economic success has been primarily associated with new settlers described as having a high "need for success" as compared to those who have left their home country for political reasons (e.g., Winter-Ebmer, 1994). Such data are quite consistent with our earlier analysis that those high in achievement motivation are especially likely to want to leave in order to find better opportunities for economic success or other forms of achievement. The finding that one of the "biggest problems" that Canadian new settlers encountered in their new community was difficulty finding decent employment (Derwing & Krahn, 2008) is also consistent with the idea that many new settlers come hoping for economic success and satisfaction of achievement or power motivation, through work (Podsiadlowski & Ward, this volume). Since it appears that economic success is so important to new settlers, it is not surprising that many of them might be disappointed not to find the level of success they were hoping for, and, hence, the disappointment in not finding "decent" work (Carr, Chapter 7, this volume).

We would argue that a key factor that studies of adaptation have ignored is the underlying reasons for the decision to move countries. People who change countries to unite with family who have previously moved to another location may have very different reasons for adapting to their new home than someone coming because of frustrated achievement motivation or power motivation. It is interesting to note that one of the reasons that highly-skilled information technology workers who have relocated to California in the United States become dissatisfied, and may return to their original home region, is their frustration over discrimination and lack of promotion to higher management positions (Alarcon, 1999). This can easily be interpreted as frustration of the power or achievement motivation that led to the original mobility.

Studies of adaptation sometimes consider the children of the mobile. Children of parents who have immigrated into a new country often report social and school-related concerns (e.g., Gun & Bayraktar, 2008). The theoretical framework developed in this chapter would suggest that children should not be combined with their parents as one sample (of "Im/migrants"). As we have argued, mobile adults are seen as choosing to move for personal reasons related to satisfaction of basic motives. Their adaptation would relate to whether or not these motives are satisfied in their new location. The situation for children is quite different, since they have not moved out of personal choice. And, indeed, studies that have compared the mental

health of these children with their mobile parents do find differences. For example, in a study of Australian new settlers and their children, the mental health of the children was more comparable to that of native-born Australians than to their parents (Alati, Naiman, Shuttlewood, Williams, & Bor, 2003).

Effects of Leaving on the Home Country

As discussed earlier, not everyone leaves a country, no matter how bad the conditions. It appears to be those who have the money and skills to move who are more likely to leave their home country and move to another country or region (Boneva & Frieze, 2001; Fang, 2006; Jackson et al., 2005). This leaves the original country with a “brain drain” as some of those who might be best suited to help develop the country are the ones most likely to leave. McClelland (1961) pointed to an association between levels of achievement motivation in a country and economic development in his early writings. If countries such as New Zealand want to bring back some of their own, the theoretical arguments presented here suggest that greater efforts will need to be made to provide more opportunities for the expressions of achievement and power motivation (see Inkson et al., 2007). Since it is young adults who are the most likely to emigrate (Bell & Ward, 2000), such efforts will need to be especially directed toward this population.

Policy Implications

As we have suggested, new settlers can be highly beneficial to a receiving country. In order to enhance this process, our analysis has suggested several concrete policy implications:

1. *Overcoming prejudice against new settlers.* Since negative reactions of those in the receiving country or region can be quite destructive and may even cause new settlers to return to their original region, it is important to provide positive information about new settlers to the public, especially to individuals with direct contact. Making people more aware of the fact that new settlers come for very good reasons and can benefit the society might help overcome prejudicial attitudes. There is a large body of work on this type of prejudice that is beyond the scope of this chapter to review. For example, see special issues of the *Journal of Social Issues* published in 2001 and 2008 (Esses, Dovidio, & Dion, 2001; Zick, Pettigrew, & Wagner, 2008).
2. *Assistance to new settlers in finding appropriate employment.* As much as possible, our analysis would suggest that it is employment assistance that would be most helpful to new settlers.
3. *Attracting new settlers.* Potential new settlers who are already experiencing frustration in the expression of their achievement and/or power motivation at home,

and who are high in work centrality, could be targeted with information about good job opportunities in the receiving region.

4. Emigration policies should limit family members who can accompany the primary new settler. We have focused in this chapter on those who seek to move/relocate in order to fulfill their own needs for achievement and power. Such new settlers can be considered primary new settlers. Others who come with them may not have these same motivational needs. Allowing large family groups to accompany the primary new settler may not be beneficial to the receiving society (see Boneva & Frieze, 2001, for more discussion of this issue).

Directions for Future Research

The ideas proposed in this chapter, although based on empirical research data, are quite preliminary. We would argue that it is especially important to use a well-grounded theoretical framework in attempting to study global (and regional) mobility. We have proposed one such framework – based on relatively mobile personality traits – but we suspect there are many others that might serve equally well. Researchers and policy makers also need more data on the psychological factors relating to why people choose to leave one region and move to another. We also need better data to determine if the ideas proposed here, that the same basic motivations underlie all types of mobility, are valid. As such studies are done, it will be important to determine if men and women do move for the same reasons, and if different cultural groups indeed have the same basic motives for their mobility.

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Chapter 6

Identity and Global Mobility

Phyllis Tharenou

Abstract This chapter examines how identity is related to the mobility of professionals who initiate expatriation. In this context a “professional” has a multifaceted identity in which career (a personal identity), family (a role identity) and cultural selves (a collective identity) are combined. These components vary in the degree to which they affect the motivation to expatriate or repatriate.

Having a career orientation as a salient component of identity is central to whether a professional initiates expatriation. Career and economic motivations are crucial. However, a career orientation is not why professionals *repatriate*.

An identity in which family roles are salient is associated with a professional – especially a woman – who chooses to expatriate to be with a partner and family. However, family and lifestyle motivations are central to *repatriation*. Nevertheless, professionals, especially women, follow the location of the primary family when making their decision. When an expatriate is embedded in the host community (e.g., when their partner is foreign born), they are more likely to remain abroad, especially if they are a woman. A woman’s family identity influences her decision to expatriate or repatriate to meet the needs of her partner and family. By contrast, a man’s identity, whereby he meets his career and financial needs and those of family provider, has a strong influence on his decisions.

Identification with the home country is a strong and enduring feature of an expatriate’s identity. Professionals prefer to expatriate to countries culturally similar to their own. Those who strongly identify with their national culture are more likely to *repatriate*.

The recommendations for a mobility strategy that takes these various motivations into account suggest that home-country governments need to provide incentives and initiatives if they are to gain professionals’ permanent, or temporary, return; to gain professionals’ remittances for the benefit of the family; and to

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capitalize on the diaspora to be able to use professionals' identification with their home country to assist its welfare.

Keywords Self-initiated expatriate · Repatriation · Mobility · Identity · Gender

Abbreviations

MNCs Multinational Companies

OECD Organization for Economic Co-operation and Development

For professionals, the world has become one large employment pool. The rise of global and multinational companies (MNCs), the opening of industry to worldwide markets, and the ease of travel and movement have given professionals ready access to global labor markets (Cheng & Yang, 1998; Hugo, Rudd, & Harris, 2003). A worldwide shortage of professionals – for example, engineers, technicians, production operators, information technologists, accountants, managers and executives – means that they are in high demand (Manpower, 2006), and MNCs and global companies have come to rely on their initiating their own expatriation to provide both a source of skilled labor (Suutari & Brewster, 2000; West & Bogumil, 2000) and managers with international experience (Banai & Harry, 2004).

Self-initiated expatriates are professionals who choose to expatriate and finance their own journey to a country of their choice for an indefinite period to develop their career (Harrison, Shaffer, & Bhaskar-Shrinivas, 2004; Tharenou, 2009), as well as for cultural and personal experiences. More often they expatriate and look for a job once they are abroad; to a lesser degree they find a job prior to expatriation (Bozionelos, 2009; Frank & Bélair, 1999; Napier & Taylor, 2002; Suutari & Brewster, 2000; Taylor & Napier, 1996; Thang, MacLachlan, & Goda, 2002; Vance, 2005) or seek entrepreneurial ventures abroad (Saxenian, 2002). There are more self-initiated than company-assigned expatriates (Doherty, Dickmann, & Mills, 2007; Hugo et al., 2003; Napier & Taylor, 2002). Unlike self-initiated expatriates, company expatriates are deployed by their employer to a country of the organization's choice for a definite period, and are often repatriated by an intra-company transfer.

Other professionals who initiate their own expatriation are skilled new settlers who expatriate to take advantage of career and income opportunities; to escape poverty, injustice, political instability, conflict or persecution; and to reunite with family members (Cheng & Yang, 1998; OECD, 2008a). Generally, skilled workers (i.e., those holding a degree) expatriate from developing to developed economies (e.g., 37%, OECD, 2008a), and less often from developing to developing economies (24%) and developed to developed economies (16%) (OECD, 2008a).

In this chapter I examine how, for professionals who initiate their own expatriation (self-initiated expatriates, skilled new settlers), identity is related to mobility. I examine mobility both as expatriation and repatriation to understand brain circulation and talent flow (Carr, Inkson, & Thorn, 2005). I begin by summarizing the major theories of identity and emphasize that a professional has multiple, competing identities, some more salient than others. I then present the evidence for

the four broad components of identity that are relevant to the self-initiated expatriation and repatriation of professionals: career, family, family by gender, and cultural identity. For each component, I summarize the evidence for, and apply theories to explain, why professionals expatriate and repatriate. I conclude by specifying which identities are most central to mobility and offer recommendations for a mobility strategy that takes these various motivations into account.

Theories of Identity

The self-concept is multifaceted and consists of multiple identities that include personal, role, and social (cf. Brewer & Gardner, 1996). Individuals partly define their self in terms of personal identities – those traits and characteristics that make the individual uniquely different from others (Hogg, Terry, & White., 1995). Aspects of personal identity relevant to whether a professional self-initiates expatriation and repatriation include traits, needs, and personal agency (Tharenou, 2008, 2009).

As identity theory proposes (Stryker, 1987), people also apply role identities to themselves – as a consequence of the positions they occupy in society (e.g., a professional, a wife, a mother, a daughter) and by which they distinguish themselves from complementary or counter roles (e.g., the role of mother takes on meaning in connection with the role of father). Some identities have more self-relevance or salience than others, so they are organized hierarchically. Differences in role salience form the basis of action and lead to differences in behavior (Hogg et al., 1995; Stryker, 1987).

People also define their self to reflect their social identity. In social identity theory (Hogg et al., 1995; Turner, 1985), someone construes their self in terms of their membership of social groups that have some emotional and value significance to them (Tajfel, 1972). A person defines and evaluates him- or herself by group membership (e.g., a professional) or by membership of large-scale social categories (e.g., a woman, a home-country national). Two processes may come into play (Hogg et al., 1995; Turner, 1985). Social categorization is when an individual uses stereotypic dimensions to accentuate: (a) the differences between their group and another group, from (b) the similarities between themselves and other in-group members. Hence, people may categorize themselves as a member of an ingroup (i.e., I am a . . . [home-country national]) and as not being a member of the out-group (i.e., I am not a . . . [host-country national]). Self-enhancement seeks to favor the in-group over the out-group on certain dimensions and contributes to higher self-esteem. For example, a professional may identify with the prototypical attributes of their national group but not identify with the attributes of their host country, and thus hold negative or stereotypical views of the host nationality, which may contribute to their repatriating.

In sum, the self-concept has three loci of definition or identity orientation, as proposed by Brewer and Gardner (1996): (a) a personal identity – which is an individual locus based on traits (e.g., a career identity based on a high need for achievement),

(b) a relational identity – which is an interpersonal locus based on role relationships with significant others (e.g., a family identity based on the roles of partner and parent), and (c) a collective identity – which is a group locus based on a group prototype and social identity (e.g., a cultural identity based on the collective prototypical attributes of home-country citizens). A particular identity orientation is associated with a primary motivation: a personal identity is associated with self-interest, a relational identity with concern for the benefit for others, and a collective identity with concern for community welfare (Brewer & Gardner, 1996).

Certain identities are likely to affect whether or not people pursue international mobility. Consider, for example, *personal identity*. For reasons of self-interest, professionals are likely to expatriate to meet their needs for achievement and gain career advancement and financial benefit (Inkson et al., 2004). With *relational identity*, if professionals strongly identify with their family role, they may not expatriate, since it may disrupt their partner's career and/or children's education. By contrast, professionals from a developing country may choose to expatriate so that they can send money home to their family. *Collective identity* – which promotes group or community welfare – may result in an expatriate repatriating to set up entrepreneurial ventures to help their home-country's economy, reflecting their identification with their home country (Saxenian, 2002; OECD, 2008a). Collective identity may also explain why an expatriate who, as a member of a Diaspora or national association abroad, occasionally returns to pass on knowledge, expertise and investment, and to link up their home country with networks to help form new businesses at home (Faist, 2008; Saxenian, 2002; OECD, 2008a).

The multiple components of a professional's identity potentially compete with each other and at times create tension when the person is contemplating mobility. A professional's career orientation may be a salient component of their identity and this causes them to seek opportunities abroad. A career identity may conflict with: (a) their identity as a dual-career partner (having a partner who also has a career), deterring their expatriation due to concern over their partner losing their job, and (b) their national identity, which deters them from expatriating because they want to stay in their home culture. Female professionals with partners and children have multiple identities: career, partner and, more than men, primary caregiver to children and homemaker (Tharenou, 2008). A strong career identity may motivate women to seek opportunities abroad, but their family identities of partner, caregiver, and homemaker deter them from expatriation. Expatriation or repatriation will be affected by the identities more salient to a professional – career vs. family or lifestyle.

Some identities are more predisposed to mobility at some life stages than at others. Super's life stage theory (Super, Savickas, & Super, 1996) indicates that professionals may be in an exploring stage in their late teens to mid-20s. At this time, adventure and leisure, personal and professional development, and perhaps study dominate. Their personal identity is central and they are motivated to expatriate by a desire for adventure and personal growth (Inkson & Myers, 2003), and repatriate relatively quickly once these needs are met. In the establishment stage from the mid-20s to late-30s, expatriates consolidate and advance at work but also settle down. Their family identity has come to the fore and they may develop the

roles of partner, homemaker, and parent, as well as those of a professional and a citizen. They may repatriate to settle down, get married, start a family, buy a house, and bring up children – motivated both by their own needs and those of others (e.g., partner, grandparents). In the maintenance life stage that spans from the early 40s to mid-50s, professionals are often in a steady work and family situation. Their career is established, their family settled abroad, and they may have a foreign-born partner and children, all of which reduce the likelihood of repatriation. However, with a salient family identity, they may repatriate to care for elderly relatives. When expatriates reach a decelerating life stage (from the mid-50s on), planning for retirement is important, and may lead them to repatriate to retire (Hugo et al., 2003).

Components of Identity Relevant to Professionals' Global Mobility

Professionals, therefore, have personal, relational, and collective identities that influence whether they are motivated to move internationally for work. Based on reviews of the evidence for global mobility (Tharenou, 2002, 2003, 2006, 2008, 2009) and identity theories (Brewer & Gardner, 1996; Hogg et al., 1995), as shown in Table 6.1, four facets of identity help to explain expatriation and repatriation: career, family, family in concert with gender, and cultural.

Career Identity

Career is the most salient component of a professional's identity that influences expatriation. Skilled expatriates and repatriates in many countries report that they initiated expatriation, in the main, for a job, career opportunities, professional development, the pay, financial benefits, and working conditions, as often or more often than they had: (a) for their partner's needs and as a result of the influence of family and friends, and (b) for adventure, travel and exploration, lifestyle, and a desire for life change or escape (Barrett & O'Connell, 2001; Brown & Connell, 2004; Crowley-Henry, 2007; Doherty et al., 2007; Fitzgerald & Howe-Wash, 2008; Frank & Bélair, 1999; Gill, 2005; Hansen, 2003; Hugo et al., 2003; Inkson & Myers, 2003; Lidgard, 2001; Morano-Foadi, 2006; Richardson & Mallon, 2005; Suutari & Brewster, 2000; Vandenbrande et al., 2006; Williams & Balaz, 2005).

Whether a professional's career identity is salient to their self is influenced by their motives or needs. Need motivation theory proposes that people who are highly achievement-oriented seek out situations in which they can compete against a standard of excellence (McClelland, 1987). Such individuals are likely to be more motivated to expatriate to work in large developed economies and MNCs – where they can compete against standards of excellence and gain rewards – than those with a low need for achievement (Inkson et al., 2004). A complementary component of a career identity relevant to mobility is receptivity to an international career

Table 6.1 Components of identity related to international mobility

Loci of orientation	Career identity	Family identity	Family with gender identity	Cultural identity
	Influences on expatriation Strong	Medium	Medium	Weak
Personal	<ul style="list-style-type: none"> • Job and career opportunities • Need for achievement • Mobility disposition • Personal agency 		<ul style="list-style-type: none"> • Career more salient for men 	
Relational		<ul style="list-style-type: none"> • Partner role • Family and friends' influence 	<ul style="list-style-type: none"> • Partner role more salient for women 	<ul style="list-style-type: none"> • Host-country cultural similarity
Collective	Influences on repatriation Weak	Strong	Strong	Medium
Personal	<ul style="list-style-type: none"> • Host-country career embeddedness • Relative host-home career opportunities • Home-country career opportunities 	<ul style="list-style-type: none"> • Need for affiliation 	<ul style="list-style-type: none"> • Career more salient for men 	
Relational		<ul style="list-style-type: none"> • Home-country family embeddedness: family and friends partner and parent roles • Host-country community embeddedness: partner and family roles more salient for women 	<ul style="list-style-type: none"> • Home-country family more salient for women • Host-country community embeddedness: partner and family roles more salient for women 	
Collective				<ul style="list-style-type: none"> • Home-country identification • Host-country acculturation

(Tharenou, 2002, 2003), meaning that a professional who is strongly predisposed to international mobility for career reasons may overcome major problems to make their move (Tharenou, 2003, 2006).

Personal agency also characterizes a career identity that is associated with expatriation (Tharenou, 2003, 2008). Social cognitive career theory (Lent, Brown, & Hackett, 2000) proposes that people's career interests and goals are partly formed from their personal agency and partly from their perception of the opportunities, support and barriers in their environment. Personal agency, which is underpinned by what a person expects, and by their self-efficacy, is a powerful determinant of career interests (Bandura, 2001). Consistent with career being a salient part of their identity, when professionals expect that expatriation will benefit their career and finances, their feelings of control increase and they are more inclined to expatriate (Tharenou, 2003, 2008). Self-efficacy for working abroad is defined as whether a person is certain that he or she can meet the challenges of working and living in a country with a culture different from their own (Tharenou, 2003). Professionals with high self-efficacy are more likely than those with low self-efficacy to believe that they can accommodate the stress of the cultural adjustment that expatriation will impose on them. They are therefore more willing to expatriate (Tharenou, 2008). A further component of personal agency for expatriation is international experience; professionals with international experience may be better equipped to deal with the challenges of expatriation (Tharenou, 2008).

Professionals for whom a strong need for achievement is a salient part of their identity are less likely than those with a low need for achievement to repatriate from countries that offer superior career, financial, and business opportunities to those at home (Inkson et al., 2004). The concept of host-country career embeddedness helps to explain the change that occurs in an expatriate's self-concept that reduces the likelihood that they will repatriate (Tharenou, 2009). Host-country embeddedness is adapted from job embeddedness theory and involves the concepts of sacrifices, fit and links (Mitchell, Holtom, & Lee, 2001). *Sacrifices* are the career and financial benefits relinquished by professionals if they repatriate; *fit* is the alignment of their personal values, career goals and future plans with job opportunities in the host country, and *links* are their connections with other people, groups and institutions through their job. Self-initiated expatriates report that employment and career opportunities, income, economic opportunities, and working conditions abroad most often prevent them from repatriating (Buechtemann & Tobsch, 2001; Fontes, 2007; Gill, 2005; Hansen, 2003; Hugo et al., 2003; Inkson et al., 2004; Sheehan, Costa, Fenwick, & De Cieri, 2006). Professionals who expect that by repatriating they would have to make a substantial career and financial sacrifice, relinquish a good career fit, and fracture many career links, have become embedded abroad by their career, reducing the chance they will repatriate (Tharenou, 2009).

Repatriation, however, is affected by the relative economic opportunities offered by the host and home countries; and whether a professional moves between countries is a consequence of perceived opportunities. Unfavorable career and economic opportunities and a poor job market in the host country push professionals to return, and those with a strong career identity may repatriate if their ambitions can be

satisfied at home. A promising job market and career and economic opportunities at home entice professionals to repatriate, as has been shown, to developing countries (Chanda & Sreenivasan, 2006; Ley & Kobayashi, 2005; Mak, 1997; Zweig, 2006). Overall, however, only a minority of studies have found that professionals repatriate as a consequence of employment opportunities at home (Barrett & O'Connell, 2001; Buechtemann & Tobsch, 2001; Frank & Bélair, 1999; Hansen, 2003; Zweig, 1997, 2006). Generally, work and economic motivations do not weigh as positively in professionals' decisions to repatriate as do family, lifestyle and patriotism (e.g., Buechtemann & Tobsch, 2001; Frank & Bélair, 1999; Hansen, 2003; Inkson et al., 2004).

Professionals with a career-salient identity will be more likely to repatriate if they anticipate a return on their investment. When professionals expatriate to increase their work experience, skills and competencies (i.e., their human capital), they are likely to expect their competencies and resultant higher job performance to gain them higher-level jobs and pay upon repatriation, as is proposed by human capital theory (Barrett & O'Connell, 2001). In support, a majority of studies, taking into account other factors, show that on repatriation, skilled self-expatriates gain greater pay, promotion, rank or level, and an employment advantage over those who did not expatriate, or who stayed abroad, or who had immigrated (Barrett & O'Connell, 2001; Brown & Connell, 2004; DeVoretz, Ma, & Zhang, 2003; DeVoretz & Zhang, 2004; Hansen, 2003; Ley & Kobayashi, 2005; Thomas, 2008).

Professionals with a career-salient identity may be more likely to re-expatriate if repatriation does not fulfill their expectations. Tharenou's (2009) review found that professionals who had initiated their own expatriation experienced problems adjusting on return (as did their company counterparts), due to: (a) a lack of work opportunities, (b) having to take lower-level jobs with less responsibility, (c) work not matching their interests, (d) dissatisfaction with the working conditions, and (e) a poor fit with the home-country lifestyle and culture (Banai & Harry, 2004; Bedford & Lidgard, 1993; Begley, Collings, & Scullion, 2008; Gill, 2005; Inkson & Myers, 2003; Myers & Pringle, 2005). Professionals who intend to re-expatriate do so for work opportunities (Banai & Harry, 2004; Bedford & Lidgard, 1993), men especially so because of career disappointments after they had repatriated (Myers & Pringle, 2005).

Family Identity

People with a strong need for affiliation seek to satisfy, maintain and restore positive relationships with others (McClelland, 1987). Professionals whose identities are characterized by a strong need for affiliation may not expatriate and may remain with their family, partner and friends – unlike those who expatriate to satisfy their need for achievement.

A professional's relational identity – represented by their roles in relation to significant others – may affect whether they expatriate or not. The evidence does not suggest that family, a partner or friends prevent a professional from initiating

expatriation – unlike company expatriates who are reluctant to accept an international assignment if they have a partner, a partner with a career, or children (especially of high-school age), and who are deterred by family influence and partner resistance (Tharenou, 2006, 2008, 2009). A strong relational identity can result in a professional expatriating. A minority of studies showed that professionals self-initiated expatriation, although infrequently, for their partner or for marriage, to follow an intimate relationship, or so that their partner could take up employment abroad (Doherty et al., 2007; Frank & Bélair, 1999; Hugo et al., 2003; Inkson & Myers, 2003; Nerdum & Sarpebakken, 2006). This practice applies more frequently to women. Other factors that influence whether a professional expatriates include having a parent abroad, family influence, and following family and friends (Brown & Connell, 2004; Hugo et al., 2003; Inkson & Myers, 2003; Nerdum & Sarpebakken, 2006).

Where high affiliation needs are a salient component of their identity, professionals are likely to repatriate to regain family ties and friendships more often than do those for whom achievement needs are dominant (Inkson et al., 2004; Frieze & Li, this volume). A professional who is strongly motivated by a need for affiliation may repatriate to care for elderly and/or sick parents and to bring up children at home (Inkson et al., 2004).

The most frequent reasons skilled self-expatriates give for intending to repatriate or for having repatriated are family and lifestyle (Barrett & O'Connell, 2001; Brown & Connell, 2004; Frank & Bélair, 1999; Gill, 2005; Hugo et al., 2003; Inkson et al., 2004; Inkson & Myers, 2003; Ley & Kobayashi, 2005; Lidgard, 2001; Mak, 1997; Richardson & McKenna, 2006; Sheehan et al., 2006). Supporting the importance that a family identity, family ties, parents in the home country, closeness to and caring for parents and elderly relatives, relationships, and bringing up children at home, motivate repatriation. From expectancy theory, professionals are more willing to repatriate when they believe that, by repatriating, family ties and their home-country lifestyle will be regained (Tharenou, 2003, 2008).

By contrast, the likelihood of repatriation is reduced when a professional has an identity as a partner or parent and their family is located abroad. Tharenou (2009) argued that self-initiated expatriates may become embedded in their community by a web of family links and friendships; a strong fit with the community in which they live; and the family and social sacrifices that they would make by repatriating. Across countries, after work-related reasons, skilled self-expatriates reported that the most common barriers to their repatriation are: (a) having family and friends in the host country; (b) their primary family being happily settled abroad; (c) having a foreign partner (especially for women), their partner being employed in the host country, or their partner not wanting to return; and (d) having children who were born or grew up abroad, are of high-school age, or who fit well into the host-country education system (DeVoretz et al., 2003; Gill, 2005; Hugo et al., 2003; Khoo, 2003; Ley & Kobayashi, 2005; Mak, 1997).

In particular, having a salient identity as a partner may result in a professional's becoming embedded in their host country. The likelihood of them repatriating is lessened if their partner is foreign-born or employed. Foreign-born partners are

unlikely to have family, friendship and work links in their expatriate partner's home country and would lose their own links if they relocated to their partner's home country. Partners of host-country origin are more likely to have full-time jobs and careers than those of home-country origin who may be unemployed or work part-time due to visa and other restrictions (Tharenou, 2008). Professionals with home-country partners are more likely to repatriate because their partners push them home. These partners are likely to have strong ties to family and friends at home, are more able to work full-time if they repatriate, and are attracted home by the lifestyle and identification with their national culture. However, a salient identity as a parent is also likely to reduce the probability that a professional will repatriate, as it may disrupt their children's relationships and education. In sum, if repatriating means that family links and friendships will be relinquished, the likelihood that a professional will return will be lower (Tharenou, 2009).

Combined Family-Gender Identity

Individuals' relational identities are also a product of the intersection of their family roles and gender. Gender role theory (Markham, 1987) explains why family roles exert different influences on men and women's willingness to expatriate (cf. Tharenou, 2008). Men and women are socialized to view relocation for work differently. Married men are socialized to view the provider role as their primary family role, and so work obligations assume the highest priority and relocation for work supports providing for the family (Markham, 1987). Married women, by contrast, are socialized to view relocating for their career as inappropriate because it emphasizes the pursuit of personal advancement and threatens the traditional, socialized family roles of the wife as caregiver and husband as provider. The family caregiver identity creates role conflict for a woman and social pressure not to relocate. Single childless women do not experience the same social pressures as married women vis-à-vis relocation, since their identity does not normally include a primary family role of caregiver (Tharenou, 2008).

In support of gender role theory (Markham, 1987), male professionals reported more frequently than women that employment opportunities, professional and career development, and income were reasons for self-initiating expatriation, whereas women more frequently than men reported that marriage, a partner or relationship, a partner's employment, family and friends, and escape were reasons for expatriating (Barrett & O'Connell, 2001; Frank & Bélair, 1999; Hansen, 2003; Hugo et al., 2003; Myers & Pringle, 2005). Tharenou (2008), also in support of gender role theory, found that having a family (a partner and/or children) was related to female professionals translating their willingness to expatriate into searching for an international job less often than men, the consequence being that women who had a family expatriated less frequently than male counterparts. Family men expatriated less often than their childless single counterparts because their willingness to expatriate translated less often into searching for a job abroad.

A caveat applies: how each partner defines his or her family and career roles affects family decisions about relocation (Bielby & Bielby, 1992). If a couple defines their identity according to traditional gender roles, family identity will be more salient than career identity for women with families (partner and/or children), which means that they will be less likely to expatriate for work than men. The inverse applies for men. But if the couple's identities are defined by egalitarian gender roles, women will be less restricted should they wish to expatriate for work (cf. Bielby & Bielby, 1992). Furthermore, despite their gender, if an expatriate has a high need for affiliation, family ties at home may draw them home, whereas if they have a high need for achievement, career opportunities abroad may keep them there.

A woman's identity as family caregiver will also affect her decision to repatriate and depends on whether her family is located in the home or host country. In support of gender role theory (Markham, 1987), female professionals, more often than their male colleagues, cited a foreign partner, an employed partner, and family and children as barriers to their repatriation (Barrett & O'Connell, 2001; Hugo et al., 2003; Lidgard, 1993), supporting their being embedded in the host country by their caregiver identity. Female professionals, more than male, may accede to a foreign partner's wish to stay abroad rather than suffer role conflict and guilt caused by focusing on their own desires. Moreover, because the family caregiver role is a more salient component of their identity, female professionals, more so than their male counterparts, are likely to repatriate when encouraged by family in their home country. Women more often take responsibility for caring for elderly relatives and for providing an extended family unit in which to raise children (Tharenou, 2009).

Male professionals offer career and financial reasons to explain their non-repatriation more often than female professionals and, if they do repatriate, it is most often for these reasons (Barrett & O'Connell, 2001; Hugo et al., 2003; Ley & Kobayashi, 2005; Lidgard, 1993). In accordance with their salient identity as family provider, men's repatriation decisions are more affected than women's by consideration of the benefits or otherwise of career and money.

Moreover, it is likely that when women are at the stage of life when they have family responsibilities, their partner and parent identities come to the fore, affecting whether they consider mobility. Because of their family caregiver identity, women make expatriation and repatriation choices in the context of potential effects on their partner and children (Tharenou, 2009). Yet, when women are at a life stage with fewer family responsibilities, career and not family identity can be a major motivator of their mobility, as it is for men.

National Cultural Identity

Cultural identity is an element of the collective self-concept and is derived from membership of a national group which possesses attributes distinct from other national groups (cf. Sussman, 2002). A person's categorization of self and others into in-groups (e.g., their national culture) and out-groups (e.g., the host-country culture) accentuates the perceived similarity of their self to the in-group and its

difference from the out-group on attributes that prototypically describe the groups (Hogg et al., 1995). People with a strong cultural identity have positive feelings about being a citizen of their home country, frequently think about how central their nationality is to their identity, and have strong ties and bonds to their compatriots (Cameron, 2004).

The extent to which a professional identifies with their home country may affect whether he or she chooses to expatriate. In one study, female professionals chose to expatriate to escape what they saw as an oppressive national culture, a patriarchal system, and the need to conform to cultural norms (Thang et al., 2002). Cultural identification may also affect the kind of country selected. Professionals are more willing to accept assignments to countries culturally similar to their own than culturally dissimilar to their own (Tharenou, 2003, 2006), perhaps because they categorize their self as similar to the attributes of similar cultures but different from those of dissimilar cultures, which they then evaluate negatively.

An expatriate's cultural identity may remain the same or may change with expatriation, perhaps influencing whether or not they repatriate. Acculturation is the adoption and assimilation of an alien culture (Rudmin, 2009). Expatriates may acculturate by completely assimilating and losing their own cultural identity and taking on the identity of the host country. By maintaining their own cultural identity but also adapting to the cultural identity of the host country, a lesser degree of acculturation may occur: a dual host-home country identity thus develops (Gill, 2005; Hugo et al., 2003; Richardson & McKenna, 2006). Acculturation may mean that professionals are less likely to repatriate.

Berry's (1997) acculturation theory (Berry, this volume) and Sussman's (2002) cultural identity model propose four orientations to cultural group relations, of which three are relevant to whether professionals repatriate. According to acculturation theory (Berry, 1997; this volume), a separation orientation occurs when the expatriate maintains his or her own cultural traditions and does not adapt to the host country. Similarly, in the cultural identity model (Sussman, 2002), a person with an affirmative identity finds that expatriation helps to affirm and cement their national identity, reinforcing their positive feelings towards their home country and people, and resulting in poor adaptation to the host-country culture. Consistent with the separation and affirmative identity orientations, professionals should be more inclined to repatriate if they identify more strongly with their national group rather than with their host country. A salient element of the identity of a significant proportion of skilled self-initiated expatriates is their strong identification and attachment to their home country (Wiles, 2008), whether as a sole national cultural identity or as a dual identity including the host country or the "world" (89%, De Cieri, Sheehan, Costa, Fenwick, & Cooper, 2007; 93%, Inkson et al., 2004; 79% Hugo, 2006). National identity, defined by home-country ethnicity and citizenship (De Cieri et al., 2007) and identification with the home country (Inkson et al., 2007), is related to a professional's intention to repatriate.

In Berry's (1997; this volume) theory, an expatriate who displays an integration orientation maintains his or her cultural traditions, but also adapts to the host country's customs. Language proficiency and cultural similarity should reflect integration

into a host country. Consistent with an integration orientation, studies have found that professionals' fluency in the host country's language, their originating from countries with a similar language, and their working in occupations in which the host country dominates, were negatively related to intentions to repatriate and actual repatriation (Beenstock, 1996; Khoo, 2003; Khoo & Mak, 2003). Similarly, in Sussman's (2002) model, an expatriate with an additive cultural identity embraces the host-country culture, including its values and customs, to gain an identity, while at the same time preserving their home-country identity. About a quarter to a third of professionals who initiate expatriation report having at the same time the national identities of their home country and host country (27%, De Cieri et al., 2007; 34%, Inkson et al., 2004). Developing a dual cultural identity may reduce the likelihood of repatriation.

Berry's (1997; this volume) theory also proposes that an expatriate who has an assimilation orientation adapts to the cultural traditions of the host country and does not maintain his or her own cultural traditions. A professional's identification with their national identity appears to decrease with time spent abroad (Gill, 2005; Hugo, 2006; Hugo et al., 2003), and those who are abroad longer are less likely to repatriate (until retirement) (OECD, 2008b), suggesting that they have assimilated. In Sussman's (2002) model, an expatriate with a subtractive cultural identity feels estranged or alienated from their home-country culture and has lost their home-country identity. However, 10% or less of expatriates report not identifying with their home country (10%, De Cieri et al., 2007; 6%, Inkson et al., 2004), identifying instead solely with another country or with the "world". Therefore, for most professionals a national identity endures – either as a sole identity (40–85%), or in combination with that of the host-country's (25–35%) or the "world" (15–20%).

Conclusion, Research Questions, and Recommendations

In sum, having a career orientation as a salient component of identity is related to whether a professional initiates expatriation. Career and economic motivations are central, and professionals take up opportunities to expatriate when career and economic opportunities are available. However, a career orientation is not why professionals *repatriate* unless they can realize their career goals at home as a result of opportunities becoming available there.

An identity in which family roles are salient is associated with a professional – especially a woman – choosing to expatriate to be with a partner and family. Family and lifestyle motivations are central to repatriation, but professionals follow the location of the primary family when making their decision about whether to repatriate, especially women. A family identity leads to a professional repatriating to be with their family, to settle down, and to care for other family members. But when a professional is embedded in the host-country community through their family living there and/or their partner being foreign born, and their children are happily settled, their consideration for their family results in their remaining abroad, especially if they are a woman. A woman's family identity, specifically her role as partner,

influences her decision to expatriate or repatriate to meet the needs of her partner and family, particularly if traditional gender roles apply. By contrast, a man's identity as family provider is more important to his decision to expatriate or repatriate, and meeting his career needs has a strong influence on whether he expatriates or repatriates.

Identification with the home country is a strong and enduring feature of an expatriate's identity. Professionals are less inclined to expatriate to culturally dissimilar countries. Those who strongly identify with their national culture are more likely to repatriate and those who have acculturated abroad are more inclined to remain.

Although there has been a great deal of research relevant to explaining the relationship between identity and global mobility, there has been very little that has directly investigated that relationship. Certain questions require answering. These include:

1. What is the relative importance of personal (i.e., career, career in interaction with gender), relational (i.e., family, family in interaction with gender), and collective (i.e., cultural) identities to self-initiation of expatriation and repatriation?
2. What are the most important components of a professional's career identity for global mobility (e.g., which needs, cognitions, and other traits)?
3. Is a career identity the most salient component of identity that explains why a professional self-initiates expatriation but not repatriation?
4. When is a woman's career identity related to self-initiation of expatriation?
5. What aspects of family identity (e.g., partner, parent, child, and friend) most interact with gender to explain self-initiation of expatriation and repatriation?
6. How does life stage interact with career and family identities to affect self-initiation of expatriation and repatriation?
7. How does cultural identity – that is, a separation orientation or affirmative identity; an integration orientation or additive identity; or an assimilation orientation or subtractive identity – affect self-initiation of expatriation and repatriation?
8. Do career, family, and cultural components of identity interact to explain self-initiation of expatriation and repatriation beyond their individual effects?

Using the conclusions I have drawn from studies examining mobility, I make recommendations for a strategy for managing mobility to assist a home-country's development. The mobility strategy I offer combines a return option, a family option, and a Diaspora option (Faist, 2008; OECD, 2008a; Thompson & Atkins, this volume).

In the return home option, home-country governments encourage and entice professionals to repatriate to help increase productivity of their home country through their enhanced human capital (skills and competencies); the transfer and dissemination of the knowledge they have gained abroad; their development of entrepreneurial ventures; and their use of their international links and networks (Chanda & Sreenivasan, 2006; OECD, 2008a). The strong influence that a professional's career identity exerts on their mobility means that, to attract professionals,

home countries need to provide suitable jobs, and good salaries and working conditions (Thomas, 2008), along with supportive infrastructure. Arrangements between home and host countries to ensure the development and maintenance of supportive policies for return (e.g., the host country having portable social benefits) also have an important role to play.

The return rate of professionals to developing rather than developed economies is lower (OECD, 2008b), and this, along with their strong career identity and self-interested motivation, means that for developing countries a permanent return option for skilled self-expatriates is more limited. In these circumstances, additional structures to facilitate professionals' short-term mobility and temporary return may be required. For example, home countries may encourage temporary return through visa schemes and dual citizenship while host countries may formulate policies to allow free movement and temporary absence (Chanda & Sreenivasan, 2006; Faist, 2008; OECD, 2008a).

In the family option, home-country governments should continue to encourage professionals to send financial remittances, provide incentives to do so, and overcome the barriers that encourage attempts to conceal this financial capital. Expatriates who have family in their home country often have a strong family identity that induces them to provide for the family's benefit.

In the Diaspora option, a majority of expatriate professionals continue to identify strongly with their home country, and consequently this identification can be harnessed to assist in its collective welfare. Expatriate professionals readily form groups, associations and organizations, resulting in a Diaspora bound by a common identity with their home country and, in part, motivated by a concern for its welfare (Faist, 2008; Saxenian, 2002). Despite their collective orientation, Diaspora members are also often highly achievement-oriented, and motivated by challenge and competing against a standard of excellence (Carr, Chapter 7 this volume; Frieze & Li, this volume; Inkson & Thorn, this volume). The Diaspora option can use these dual motivations of attachment to their home country and high achievement orientation to encourage expatriates as a group to achieve the challenging goal of helping their country. Diaspora links and activities need to be fostered by the governments and organizations of both host and home countries, including through the development of policies that allow straightforward temporary return to the home country and regular visits, as well as the capacity to live and work in both places. Other policies worthy of consideration include harmonized visa and tax schemes, modified immigration regulations that allow right of movement, and easy establishment of across-country associations, as well as initiatives developed by across-country agencies.

Government policy to assist in the operationalization of the Diaspora option needs to be developed. Such a policy should encourage and enable expatriate associations and networks to remit knowledge (i.e., information flow back home); transfer technology and skills; assist in developing entrepreneurial ventures; act as a conduit or broker for investment; and foster cross-country networks and collaboration (Chanda & Sreenivasan, 2006; Saxenian, 2002; OECD, 2008a), all of which are more likely to be achieved through group action than by individual expatriates.

Home-country governments need to offer incentives for, and remove barriers to, the Diaspora's investment in entrepreneurial and established ventures at home, while connections between the activities of home-country and host-country firms need to be facilitated. Home-country governments need to support the actions of transnational entrepreneurs, those individuals who live and work in home- and host-countries, as they forge social, economic and other links in their development of entrepreneurial ventures (Saxenian, 2002).

In conclusion, professionals have a multifaceted identity that combines, in varying degrees of salience, career, family and cultural selves. These sometimes competing components affect a professional's motivation to both expatriate and repatriate. Natural motivations of self-interest, concern for others, and concern for a collective welfare arise from career, family, and cultural identities. All of these influence whether professionals expatriate or repatriate. Home- and host-country governments and organizations, and across-country agencies, need to take advantage of these natural motivations by formulating mobility strategies to enable improvement of individual and collective wellbeing, economic success, and poverty reduction in home countries.

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Chapter 7

Global Mobility, Local Economy: It's Work Psychology, Stupid!

Stuart C. Carr

Abstract Local economies are present at the beginning, middle and end of global mobility. So too is the workplace. A neglected stimulus to emigrate from lower-income settings is the derisory remuneration that many skilled Indigenous professionals receive, compared to imported expatriate counterparts. As economic new settlers too, however, they can face discriminatory job selection practices, becoming under-employed. Those with most persistence and other capabilities may choose to stay abroad, distorting which competencies return home. These stages in the journey of many skilled new settlers expose the “migration-development nexus” as rhetoric rather than reality. This chapter responds to calls in the 2009 Human Development Report from the United Nations Development Programme which argues for a fresh, inter-disciplinary approach to overcoming precisely these kinds of barriers to human development.

Keywords Dual salary system · Double de-motivation · Brain waste · Competency development · Talent flow · Human capability · Migration-development nexus · Barriers to human development · Poverty reduction

Abbreviations

ADDUP	Are Development Discrepancies Undermining Performance?
CART	Classification and Regression Trees
CHAID	Chi-squared Automatic Interaction Detector
DFID	Department for International Development
EAC	East African Community
ESRC	Economic and Social Research Council
HCNs	Host Country Nationals
IOM	International Organization for Migration
ILO	International Labour Organization

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SET	Social Equity Theory
SMEs	Subject-Matter Experts
UNDP	United Nations Development Programme

Global mobility and local economy are closely connected. High-skill emigration can deplete human services (Katseli & Zenogiani, 2006), leaving either expatriates or new settlers to fill the gap (Hugo, Rudd, & Harris, 2001). Low-skill emigration can generate remittances back to a home economy (ibid, 2006), offsetting dependence on international aid (Musser, 2006). What is immediately clear from such examples is that global mobility is a local question. It concerns the local economy. Localizing global mobility can be taken further, too. A primary and rather obvious interface where economic activity takes places is the workplace, usually in the form of an employing organization (Carr, 2004). Organizations, in turn, work through people (Ferris, Perrewé, & Anthony, 2000). They deal on a daily basis with a range of everyday human concerns and motives – they feature work *psychology* (Latham, 2007). Yet work psychology itself seems strangely absent from much debate about, and practice in, managing global mobility.

This chapter narrows the gap. It speaks to three work psychology elephants in the workplace parlor: (1) Widespread “dual salary” systems that remunerate (i) expatriate workers and (ii) host national counterparts working in the same immediate environment, doing the same or a similar job, very differently. How do rather blatant remunerative disparities affect motivation, mobility, external dependence, etc, and should they be scrapped? (2) “Defensive routines” widely used in organizations to rationalize the exclusion of skilled new settlers from full employment (Maynard, Joseph, & Maynard, 2006). What organizational practices are most likely to prevent a resultant “brain waste”? (Mahroum, 2000). (3) There is a flagrant misnomer in the whole discourse on “brain drain”, when most of the variability in work performance is patently *not* explained by intelligence quotients (Maier, 1955; to Schmidt & Hunter, 1998). What other talents are at work and how can their flow into and out of local economies be managed?. These are all issues flagged in the recent Human Development Report, on barriers to human development through global mobility (UNDP, 2009).

Dual Salary

The concept of dual salary is reminiscent of colonial days, and relations following independence in the latter half of last century. At that time the official line was that capability could be fostered through “Technical Assistance”, or “Technical Cooperation”, delivered by highly-skilled and educated expatriate “experts” (Carr, MacLachlan, & McAuliffe, 1998). Even if having an expatocracy was fair at the time, local economies today have changed (MacLachlan, Carr, & McAuliffe, 2010). Many have grown capability through higher education and training undertaken overseas (Manning, 2006). People expect “equal remuneration for equal work” (UNDP,

2009, p. 101). After independence in 1975, Papua New Guinea invested considerably in doctoral qualifications, rendering her lingering dual salary policy an affront to local aspirations and achievements (Ila'ava, 1999). As Ila'ava notes, local organizations have been flashpoints for industrial unrest. During 1998 for instance, the National University closed down because of dual pay. In 2009, leaders from both Papua New Guinea and Australia (the former colonial power and a chief donor of bilateral aid) publicly agreed that salary bills for technical assistance are unacceptably high (Vainerere, 2009).

Compounding these socio-economic disparities between employees from higher- versus lower-income economies, expatriate aid co-workers *themselves* often originate from more than one economy. This combined global mobility, from a diversity of labour markets into one co-locality, creates even more income disparity, this time within and between expatriate communities themselves (Carr & Bandawe, 2010). The clearest disparity may still be between “expat” versus “local” (Turner, 1991, p. 156). However an overall point is inescapable. Aid landscapes are characterised by diversity that is not only socio-cultural and -political, but also socio-economic.

Dual salary tensions spill over into, and affect, local communities. National universities for instance have to service communities of students, as well as their local community at large. Sometimes the effects of the dual system are more dramatic. The conflict in Bougainville, for example, has been partly attributed to an “economic apartheid” of dual pay (and benefits) in one organization (O’Callaghan, 2002). This organization is a multinational mining company. It works for shareholder profit rather than a social good. Like aid workers, employees in for-profit sectors have long travelled from one local economy (their own) to another (a host economy). A key reason why those international companies have relocated is precisely because of relatively low labour costs in a local setting. The decision is economic, and work itself is on the move, bringing some economic inequity. Nevertheless most of the attention in research on the “expatriate assignment” is concentrated on culture, and cross-cultural rather than -economic differences. Relocations, however, continue to rise with globalization generally, perhaps especially so in and after recession (Haslberger & Brewster, 2008; Selmer, 2010).

Socio-economic diversity is thus starting to be taken seriously, at least by business (Festing, Eidems, & Royer, 2007). Logic implies that dual systems in the private sector may be anathema to local aspirations, free labour markets, and workplace collaboration (Siegel & Hambrick, 2005). The same applies in technical cooperation, where dual systems also blatantly contravene aid policy. The Paris Declaration on Aid Effectiveness (2005) stresses principles like “alignment” of aid with local aspirations, and the “harmonization” of aid delivery between otherwise fragmented agencies (www.aidharmonization.org/secondary-pages/Paris2005). Dual salaries echo a distinction in Argyris (1999): theories espoused (what is said in policy) versus theories-in-use (what occurs in practice). The contradiction is maybe why dual salaries are taboo, overlooked and under-questioned by those who benefit most from them, an “Expatriocracy” (MacLachlan et al., 2010). Of course there will be one or two individuals who manage to “break into” the expatriocracy, and some may even be galvanised by the gap. Yet breakouts

are exceptions. For many local professionals, dual systems mock their achievements with a *Concrete Ceiling*.

Why is Dual Salary Problematic?

One of the most influential theories in psychology is Social Comparison (Festinger, 1950). Its point is that people rely on *reference* groups to validate their world views and sense of identity (Sherif, 1965). Comparison processes fall into two main categories, opinion and ability (Festinger, 1954). Opinion comparison thrives on uniformity, providing a sense of cohesion and solidarity. Ability comparison is more divisive, motivating the comparer to out-perform others. Festinger (1954) acknowledged cultural variations in the motive (pp. 124/5). Nonetheless ability comparison is apposite to the modern workplace, including the comparison of remuneration (Carr, 2004). Corollary III A in the theory states that, “Given a range of possible persons for comparison, someone close to one’s own ability . . . will be chosen” (Festinger, 1954, p. 121). Hence people doing the same job with equivalent qualifications and comparable experience to their international counterpart will compare themselves with those colleagues, on salient indicators of ability – like remuneration.

Do these comparisons feature in contemporary econometric analyses of mobility behaviour? Comparative ratios of some kinds do. According to human capital theory for instance, people gravitate toward locales with a higher net income potential (Harris & Todaro, 1970). Econometric studies may calibrate “migrant-to-non-migrant earnings ratios” in the same occupation (p. 2206) and, in the return direction, post-return annual income compared to the income earned on average by “non-migrants” in the same occupation (Brown & Connell, 2004). Brown and Connell’s analysis focused on mobility among skilled health professionals from Pacific Island Nations. Their indices of relative income were significantly predictive of intentions to emigrate: relative deprivation predicted mobility away from home. Relative gain predicted mobility homewards: “Critically important. . . as an influence on migration are relative income inequalities *within* countries alongside the expected inequalities *between* countries” (ibid, p. 2207). Missing from the variable set however were comparisons with other workers from different places working *within the very same workplace*. Health sectors are often precisely reliant on such international partnerships. Hence whilst econometric approaches are broadly consistent with ability comparison theory, they can also overlook a rather obvious reference point for comparison by skilled local employees – the expatriate colleague who works together with them doing the very same job, in the very same office or field-setting.

How is Dual Salary Problematic?

Ability comparison theory positions expatriate workers alongside local counterparts. Both are integral to understanding mobility. There are three outcomes from

their comparison processes. (1) Remuneration is the same, motivating workers to compare more favourably, by earning more. Outcome (1) does not apply to “dual” salaries. (2) Remuneration may be less than one’s counterpart. This likely applies to the local counterpart. (3) Comparison exposes a higher remuneration than one’s colleague. This likely applies to the expatriate. Outcomes (2) and (3) are co-occurrences. According to Festinger, “When a discrepancy exists. . . there will be tendencies to cease comparing oneself with those in the group who are very different from oneself” (1954, p. 128). Groups would thereby drift apart, a process termed “segregation” (1954, p. 136). Socio-economic apartheid like this is not conducive to development cooperation, or teamwork.

These predictions assume that the comparer *accepts* the discrepancy, as reflecting genuinely discrepant abilities, which many local workers do not (Ila’ava, 1999). In order to see what might happen when they do *not*, we need derivatives from comparison theory about work justice. The most influential of these is equity theory (Adams, 1965). This predicts that workers compare outcomes-for-inputs (like pay and benefits for hours worked) against the ratio of outcomes-for-inputs being received by comparable others in a same reference group (like an organization, or a profession, or a job). If an imbalance in these comparative ratios arises, the comparer will be motivated toward restoring the balance (equity restoration). In the case of (1) under-remuneration, they may reduce their inputs (effort) in proportion to their lower outcome (pay). In the case of (2) over-remuneration, we may see increased inputs to match raised outcomes. However, if that tactic is non-sustainable, inputs will be inflated psychologically: “If I am remunerated more, maybe I am worth the difference.” Equity restoration is thereby in the eye of the perceiver, and is a theory about psychological balance.

As originally conceived, “equity” is an individual-to-individual comparison, restricting its generalizability from group-based societies and comparisons generally. However the concept has undergone revision to include equity restoration between groups (Carr, MacLachlan, & Campbell, 1997). Social Equity Theory (SET) incorporates cultural differences in principles of distributive justice, for example collectivistic or egalitarian values, and belief in need. SET predicts that these will add to, and thereby exacerbate perceived injustice (Carr, 2004). An initial test of SET was run in an organizational survey conducted at the University of Malawi (Carr et al., 1998). At the time, remunerative ratios between technical assistance (aid-funded) lecturers and host national counterparts, with exactly the same job title, ranged from 10:1 to 20:1, depending on the particular funding aid agency. Local and international workers were remunerated locally and internationally, respectively. In today’s parlance therefore, at that time and in this particular institution, there was neither alignment nor harmonization.

The data from the survey supported SET. Host national workers felt very strongly that the gaps were unfair and de-motivating, and ought to be removed. International workers were not able to augment their performance by a factor of 10 or 20 to match their outcomes. Instead they reported some guilt at the imbalance, and an inflated sense of input to the job, leaning toward agreeing that “Expatriates are better employees than their local counterparts”. This alleviates guilt psychologically.

Unsurprisingly perhaps, local lecturers strongly disagreed, asserting that they had just as much ability, and even more experience. Less obviously, the expatriate lecturers did not realise that local workers felt so aggrieved; they had a blind spot vis-à-vis local perspective. Overall therefore, the study is an early warning that socio-economic diversity at work matters. It matters because of social ability comparison. Through something as basic as remuneration, aid might be undermining its own official goals and policies, from cooperation to alignment and harmonization.

This early study focused on educational aid. It was set in a non-profit workplace. Recent developments extend to for-profit work. In choosing with whom to compare for instance, a key role is accorded to closeness (Toh & DeNisi, 2003). According to Toh and DeNisi's Proposition 2, "The closer the proximity of HCNs (Host Country Nationals) to expatriates, the greater the availability of information about the expatriates and, hence, the greater the likelihood that HCNs will choose expatriate referents" (2003, p. 613, parenthesis added). Toh and DeNisi stress that rising local aspirations and qualifications are drivers of this comparison process (2005).

Studies of such ideas have been conducted in the emerging economy of China, within International Joint Ventures (Chen, Choi, & Chi, 2002; Leung, Wang, & Smith, 2001). These economies are characterised by rising prosperity and with it economic expectations (Davis, 1969). Between 1993 and 2001, Leung et al. (2001) found that local workers in hotel joint ventures are increasingly comparing their salaries with expatriates' in joint ventures, and that these comparisons are increasingly tied to levels of job satisfaction and organizational commitment. The role of both local and expatriate reference groups is studied further in Chen et al. (2002). Their study of nine joint ventures found local employees reported unfairness when comparing with expatriate salaries. This was offset, however, by more favourable comparisons with local employees in other enterprises. The deleterious effects of salary disparities (on perceived fairness) could also be tempered by displays of "interpersonal sensitivity" from expatriate referents being "kind and considerate" and "respecting locals" (ibid, p. 812).

These findings can be cast in terms of general work justice theory (Greenberg, 2007). Dual systems distribute resources (wages) unevenly, a "distributive" injustice. They can also challenge interpersonal skills, termed "interactional justice". Interactional justice is part of "procedural" justice, which encompasses probity and local input/voice (Greenberg, 2007). Skilled Chinese workers in Singapore, for instance, reported their work to be less just procedurally, compared to local counterparts whose terms and conditions were better (Ang, Van Dyne, & Begley, 2003). Finally and importantly, a positive relationship between being foreign-versus-local and perceived procedural justice (versus injustice) was amplified (moderated) by higher "task interdependence". This is the extent to which workers rely on each other to complete a job – and arguably a feature on international assignments in general.

A recent study of remuneration disparities reviews remuneration differences in emerging economies China and India, with gaps in lower-income economies in Africa (Malawi, Uganda) and Oceania (Papua New Guinea, Solomon Islands).

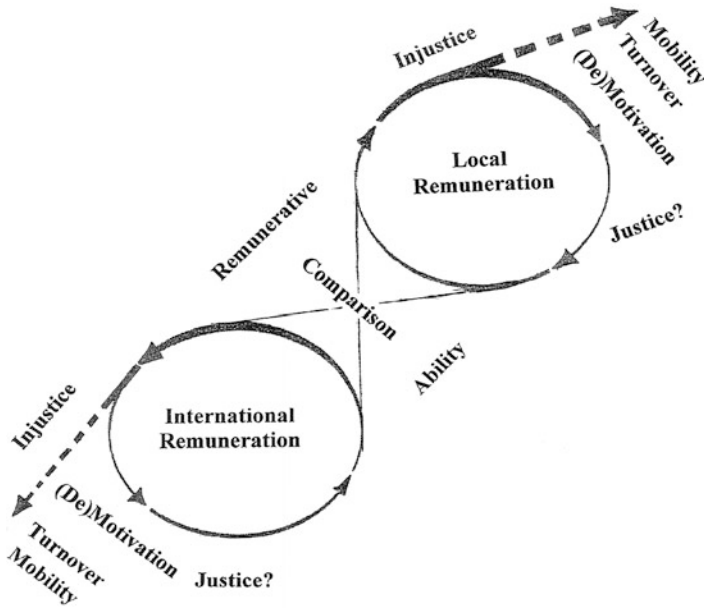


Fig. 7.1 A double de-motivation model (Source: ADDUP, 2009)

Project ADDUP (Are Development Discrepancies Undermining Development?) included for- and non-profit sectors, and measured multiple facets of organizational justice (ADDUP, 2009). A model for the study is shown in Fig. 7.1. It is called double de-motivation, based on Carr et al. (1998). In the study, we controlled for culturally-related values, candour, and culture shock, and separated individual from organizational and country-level effects.

Pay ratios exceeded deprivation thresholds for many locally remunerated workers, ranging up to 9:1. Consistent with SET and regardless of remuneration (local, international) skilled workers compared remuneration, rating their own abilities above average (Festinger, 1954). These ratios nevertheless peak lower than the original study in Malaŵi, which might explain why we found no evidence of guilt among the internationally remunerated. Colleagues remunerated locally, however, rated their remuneration as unjust, distributively and procedurally, and were de-motivated. There was no strong evidence of a double de-motivation in this study, since both groups rated their own abilities above average.

The study attempted to model the processes in Fig. 7.1. Self-assessed ability predicted remunerative comparison, which predicted sense of justice-injustice, which predicted motivation-(de)motivation, thoughts of turnover and global mobility. The magnitude of the intercorrelations also approximated a “quasi-simplex pattern” (Guttman, 1954), in which adjacent variables are more closely correlated than those more distant from each other (Alwin, 2007). Although exploratory and containing error (“quasi-”), the stepwise pattern in associations suggests a predictable order in

the associations (“simplex”). This pattern replicated at both individual and organizational levels of analysis. Indeed they were stronger at the level of organizations, which moderated the linkages more than did country (x 6) or region (Asia, Africa, and Oceania). Hence there may be potential for organizations to intervene in the management of justice in remuneration systems, across both aid and private sectors (ADDUP, 2009).

Criterion measures in this project were attitudinal. Additional, behavioural measures have been taken in experimental studies. The task entailed working after hours, on an additional job, resembling intrinsic motivation, “organizational citizenship behaviour”, or “contextual performance” (going the extra mile). Contextual performance may be a characteristic job requirement in cross-cultural assignments generally, for- and non-profit. Against a control group working as volunteers on an intrinsically interesting experimental task, pay ratios as low as 2:1 and 1:2 were sufficient to lower work output significantly. This twin effect occurred for workers paid either individually or contracted as groups (Carr, McLoughlin, Hodgson, & MacLachlan, 1996, Carr, Hodgson, Vent & Purcell, 2005¹). The findings support Fig. 7.1. They demonstrate tangible and causative links from (i) pay differences to (ii) work-related behaviour. Such differences follow from global mobility into international assignments, in the form of non-alignment and non-harmonization.

As well as being antecedent to remuneration differences, mobility is also implicated in their consequences. Job satisfaction and work engagement together predicted thoughts about leaving an organization (turnover), and leaving the country (mobility). The former finding replicates findings from work psychology generally, and is not necessarily connected with remunerative comparison (Latham, 2007). In addition however, levels of (de)motivation stemming from remuneration differences also predicted the criteria, turnover and mobility. These findings concur with human capital theory. In particular, not only does mobility into a local economy affect local work output via imported remuneration differences, it might also contribute to outward mobility, in particular via perceived injustice related to remuneration inequities in the local workplace.

What Can Be Done About Dual Salary?

At least two different approaches to the dual salary elephant are possible: (1) accept the differences and try to manage them, or (2) reject the differences in favour of a more just system itself (Lefkowitz, 2008). Under (1), companies and aid agencies could attempt to respectfully explain the reasons behind the differences, enhancing procedural justice (above) or train expatriates in how to be more “interpersonally

¹Among higher paid groups, de-motivation occurred when the group was paid more than others but not the most of all. The top paid group was relatively motivated. However most expatriates are not in this bracket and “expat” communities are multi-national and pay-diverse. Relative deprivation may thus be the norm rather than an exception.

sensitive” (Chen et al., 2002, p. 816). Workers could be selected for relatively low “equity sensitivity”, which experimental research has suggested explains a significant proportion of the variance in responses to pay differentials (McLoughlin & Carr, 1997). Such interventions, however, may simply prop up an outmoded system, being a servant of power not empowerment (Baritz, 1960; Lefkowitz, 2008). Alternative solutions (2) have been identified within project ADDUP, by in-country experts and stakeholders in for- and non-profit sectors (2009). Consistent with policy focus on Alignment and the ILO’s Decent Work Agenda, the following recommendations span structural and organizational levels (Table 7.1):

Table 7.1 Some basic recommendations to combat dual pay (*Source*: Extrapolated from ADDUP, 2009)

-
- Make job requirements transparent and select accordingly
 - Close the gap
 - Introduce performance-based management, including remuneration
 - Enact a policy of Localization (select local workers where available)
 - Evaluate the above
-

Work psychologists have expertise in making job requirements transparent, through structured Job Analysis, and structuring assessments through Job Situational Interviewing (Carr et al., 1998). “Closing the gap” might entail lowering international rates for non-profits, many of whom attract high performance applicants despite local pay (Werker & Ahmed, 2008). Paying everyone international rates diverts aid resources from and splits local communities (Vainerere, 2009), while local rates already impoverish local workers, and lack social responsibility (ADDUP, 2009). Global “Job Evaluation”, in which a job’s size is estimated by job experts, plotted against remuneration and a line of best fit calculated, might derive a happy medium, using combinations of both individual and group rewards (Carr, 2004). Monitoring the above can be done by periodically regressing remuneration on country-of-origin, over and above elements in career capital like education and experience (Melamed, 1995). As Melamed showed, managing the issue is ultimately about confronting workplace *discrimination* (Millsap & Taylor, 1996²).

Defensive Routines

As well as being a barrier to full employment at home, workplace discrimination can also be a barrier for skilled new settlers, *abroad*, in higher-income settings (Brown & Connell, 2004). This issue too is highlighted in the Human Development Report (UNDP, 2009, p. 51). The backdrop for that particular elephant in the parlor is a policy discourse around a “migration-development nexus” (Lavenex & Kunz, 2008). This is a nice idea originally conceived as a rational integration of immigration and

²I am grateful to Dr. Nigel Guenole for the reference.

development policy (Nyberg-Sørensen, Van Hear, & Engberg-Pedersen, 2002). It was seen as a curb on the excessive recruitment of talent from lower-income countries, by wealthier nations bent on feathering their own knowledge economy nests (Davidson, this volume). The new goal was a “win-win” outcome for sending and host country alike (International Organization for Migration (IOM), 2006). New settlement could “increase the incentives to acquire education and skills”, and eventual return mobility might lead to a future “brain gain” for the original sending economy (ibid, p. 11). The nexus, it seemed, would enable richer countries to keep recruiting with impunity, using points-systems that promise a new and better life in a new, richer economy (Ager & Ager, this volume; Carr & MacLachlan, 2005).

Today there is growing recognition that new settlement is not quite as boundary-less as the policies and discourse implies (Inkson & Thorn, this volume; UNDP, 2009). The elephant in this particular parlor is that skilled new settlers – even prior to the current recession which has probably exacerbated matters (UNDP, 2009, p. 51 – find it difficult to secure a job that matches their skills. Equal opportunity to develop their career may be a long way away. Those barriers are termed “access bias” and “treatment bias”, respectively (Levitin, Quinn, & Staines, 1971). Best placed to judge the bias, based on alignment, are skilled new settlers themselves. In New Zealand, skilled new settlers from China find it difficult to secure a job that matches their skill level, according to the points system on which they entered the country (Chan, 2001). It may be equally hard to advance their careers within an organization once employed (Department of Labor, 2003). New Zealand is far from alone, however. There are numerous studies demonstrating that skilled new settlers, and in particular those from lower-income economies, do not get a fair crack of the whip regarding access or treatment (e.g., Aycan & Koc, 1999; Dovidio & Esses, 2001; Ruber, 2000; Sweetman, 2009; for a review, Podsiadlowski & Ward, 2010).

A recent study of skilled Lebanese new settlers in France highlights how issues like non-recognition of qualifications can be used as instruments of *exclusion* (Maynard et al., this volume). This contravenes cultural rhetoric around liberty, equality, and fraternity (Al Ariss & Özbilgin, 2010, in press). There is an apparent contradiction in any system that (a) sends a signal to would-be new settlers that their skills will be valued but then (b) denies or subverts equal opportunity *based* on skills, after arrival. As Al Ariss and Özbilgin observe, much of the discretion about who gets a job, or promoted, lies with organizations. Hence organizational psychology at work might be working against – *negatively mediating* – any “migration-development nexus” (MacLachlan et al., 2010; for a wider range of examples, UNDP, 2009, p. 61).

Discrepancies between policy discourses versus selection practices are not confined to higher-income economies. Trade blocs are found all over the world, including lower-income settings. One such bloc is in sub-Saharan Africa, the East African Community (EAC). Like other trade blocs, the EAC exists to enable the free movement of goods, services and labor between member states, in this case in Uganda, Kenya and Tanzania. Yet highly-skilled and arguably much-needed new settlers coming from within the bloc have not always received due consideration when applying for jobs (Carr, Rugimbana, Walkom, & Bolitho,

2001). Within the Southern African Development Community, attitudes of “suspicion” toward new settlers from other African nations have been reported (The Economist, 2002). Observations like these are reminders that barriers to genuine mobility can sometimes arise when least expected. Ultimately, the barriers are often human.

Why Should We Expect Barriers to Boundary-Less Mobility?

Based on comparison processes, Similarity-attraction theory predicts that similarity is comforting; dissimilarity threatening (Byrne, 1997). An example from the world of work is “attraction-selection-attrition” (Schneider, Smith, Taylor, & Fleenor, 1998). This is a cyclical process in which organizations increasingly select and then retain clones of themselves, whilst those who differ attrite. Similarity-attraction differs as well according to how workers think about each other at the time. Within groups, similarity attracts like-minded individuals to one another. Between groups, however, similarity primes inter-group rivalry. This has been nicely expressed as the “narcissism of minor difference” (Freud, 1961). Social identity theory is a case in point. It predicts that groups will be prejudiced against comparable out-groups, discriminating in favor of in-groups (Tajfel, 1978). Social dominance theory goes further, proposing that groups are motivated to lord it over each other (Sidanius & Pratto, 1999). Minor differences can become “fault-lines” for subsequent conflict (Lemieux & Pratto, 2003). Rifts may surface for instance during economic hardship, when it becomes realistic to expect conflict over finite resources like jobs (Taylor & Moghaddam, 1994; UNDP, 2009).

These multiple motivating reasons – similarity, identity, dominance and priority – converge on a likely discrimination against skilled new settlers from different, similar and poorer economies. How the motives actually play out at work is best captured by the theory of organizational learning (Argyris, 1998). Focal are psychological barriers to learning at work, especially *defensive routines*. As the name suggests, these can be habits that have served a group well in the past. They are and defend the status quo, often implicitly, without saying as much. Challenges after all are disruptive, hence they are taboo, and as Argyris puts it, “undiscussable”. Dual salary might be one such taboo, which we have already seen. Now we are seeing another. Defensive routines are barriers to mobility. Similarity, identity, dominance and priority must automatically be defended when challenged, for example by cultural and economic difference.

Policies that are anti-discrimination, and discourses like “migration-development nexus”, are included in the challenge. They add pressure to be politically correct. They become theories espoused, not used. Their net result is anti-conformity, tacit resistance, a closet reactance. Systems will increasingly say one thing, but do another. Excuses will be generated, “he doesn’t have ‘the Kiwi (colloquialism for New Zealander) attitude’, ‘Kiwi’ experience.” Meanwhile, of course, skilled new settlers are excluded, leaving a sense of broken promise, injustice, and deprivation.

How Can We Expect the Barriers to Manifest?

In a study of skilled new settlers from Lebanon in France, Al Ariss and Özbilgin (in press) found a number of practices at work, at different levels in the system. These could be reflecting theories-in-use. Qualifications could take overly long to be recognized by local government, for example. For non-regulated professions, discretion rests more with business and service organizations. Skilled new settlers might be made to work harder than their local counterparts for the same recognition or reward. The net result of such barriers to genuine mobility, according to Al Ariss and Özbilgin, are

“contradictions between the official discourse regarding recruiting labor immigrants and the ways in which they experience inequalities in accessing . . . employment in France. . . . In contrast to the professed value of equal opportunity for immigrants in France, French nationals with equivalent qualifications were privileged in terms of job opportunities” (ibid., in press).

Figure 7.2 presents a model of this gap between rhetoric and everyday work practice. Similarity-attraction is assumed to be generally linear. Moderating the link, however, are influences from social identity, specifically some narcissism from minor difference. Social dominance motives work in higher-income economies against lower-income origins. Realistic conflict would augment preferences for mid-dling similarity, but amplify negative effects from social identity and dominance.

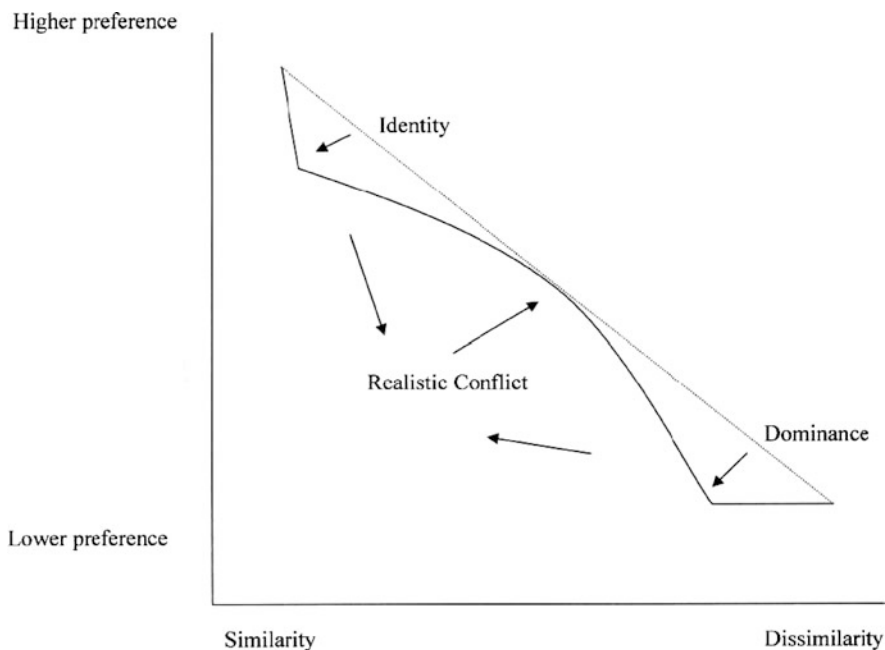


Fig. 7.2 Attraction as a function of similarity, social identity, dominance and realistic conflict

Overall therefore, Fig. 7.2 predicts covariance between similarity and organizational preference, moderated in the diagram by (social) “Identity,” “Dominance” and “Realistic Conflict”.

An initial test of the model in Fig. 7.2 is found in Coates and Carr (2005). The study used a technique called “policy capturing” (Ones & Viswesvaran, 1999). This captures policy-in-use, rather than policy-espoused, in company and national rhetoric. Based on Carr et al. (2001), participants were experienced subject-matter experts (SMEs). They reported how panels will, in their experience, typically behave (in practice this was based on an average of more than 10 years’ experience). Indirect scenarios reduce response bias, and increase predictive validity (Aycan, Kanungo, & Sinha, 1999; Robinson & Clore, 2001). Capturing what selectors actually do, SMEs rank-ordered a group of equally qualified, skilled and experienced candidates, from multiple higher- to lower-income economies. They also ranked source countries for similarity, dominance, etc. Forced-choice dilemma judgments are more sensitive than ratings for detecting bias (Arvey, 1979). The jobs to be filled were prioritized by national governments, for national economic development.

Figure 7.3 plots the mean rank preferences for each country-of-origin. It includes a theoretical function linking similarity and attraction (dotted line). In the absence of bias, the function should be horizontal (the candidates are equal). Figure 7.3 shows that attraction decreased as country of origin became perceptibly less similar, a variation that was statistically significant (Coates & Carr, 2003). The slope was not smooth however; it resembled Fig. 7.2. Fractiousness surfaced between New Zealand and Australia, with a significant drop between these similar groups, a dip below the dotted line. This particular narcissism of minor difference is termed “inverse resonance”, from applied mechanics where waves of similar frequency resonate negatively (Carr et al., 2001). The inverse resonance is not due to dominance, on which Australia is ranked better than New Zealand, and which the theory thus

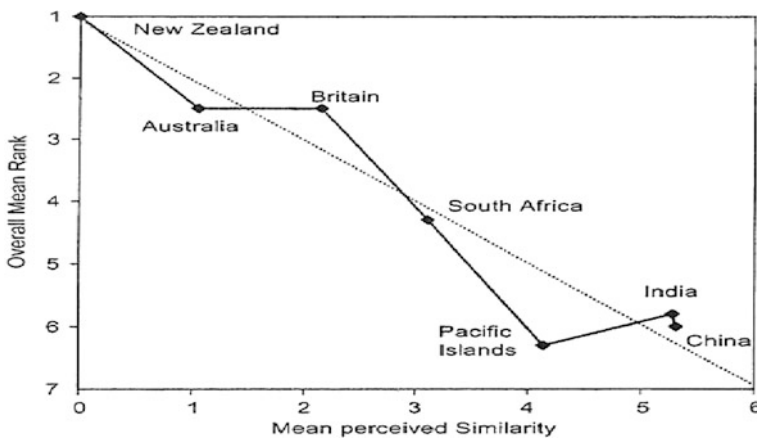


Fig. 7.3 Mean rank preferences as function of mean perceived similarity to New Zealand (*Source*: Coates & Carr, 2005)

predicts should have led to higher, not inverted, preferences for Australians (the latter is more in tune with Social Identity). Dominance bore an overall link to preferences. On the right of Fig. 7.3, it may work against lower-income groups from India, China and Pacific Islands (Ongley & Blick, 2002). Unlike their higher-income counterparts, such candidates were neither ranked differently on dominance, nor differentiated on predicted job preference.

A number of complementary measures in the study suggested that function plotted by the data in Fig. 7.3 is valid. First, the SMEs' subjective ordering of countries by similarity mirrors leading global studies (Hofstede, 1980; House, Hanges, Javidan, Dorfman, & Gupta, 2004). SMEs' rankings on dominance, too, converged with indicators of socio-economic status taken from the UN Human Development Report at the time (United Nations, 2003). Convergence like this indicates that policy has become internalized into a theory in use. Second, we asked the SMEs to explain their predictions (Coates & Carr, 2005). A statistically reliable content analysis of the explanations yielded further convergences with the quantitative data. An exemplar theme for similarity-attraction is "recruit in own image", including dominance: "They (HR and Line Managers) feel that people who come from a *standard of living* most similar to New Zealand will fit into the environment more easily" (2003, p. 590). "Fitting-in", looking for "Kiwi" traits, etc., jars with the rhetoric of points systems, recruiting diversity, as well as our Human Rights Act (1993; Bryson & Hosken, 2005). Hence there may be a degree of implicit (not fully stated) *contradiction* between policy espoused and policy in use. This is precisely what Argyris termed "defensive routines".

Figure 7.3 did not include assessments of realistic conflict, since jobs were in plentiful supply at the time (2003). Figure 7.3 may elongate in such times. The best judge of how much is the new settler herself. Respecting policy principles like alignment, and assessing a "migration-*development* nexus", requires her inclusion (Maynard & Ferdman, this volume). Exclusion can erode new settler adjustment, work performance and wellbeing, via unemployment, under-employment and lack of recognition (Feldman, 1996; Maynard et al., 2006; Murphy & Athanasou, 1999). Deleterious effects span maladjustment (Abbott, Wong, Williams, Au, & Young, 1999), stress (Lopez, Haigh, & Burnley, 2004), and lost human capital (Colic-Peisker & Tilbury, 2006). Coming closer to full employment whilst still being rejected may spur relative deprivation and depression (Mace, Atkins, Fletcher, & Carr, 2005).

What Can Be Done to Manage These Barriers?

A useful construct is "cultural competence" (Sue, 1998). The "cultural" in question extends beyond societal and national, covering organizational and professional groups, for instance (Davidson, this volume). Cultural competence is also sometimes called "cultural intelligence" (Ang et al., 2007). It has three main components: awareness, knowledge and skill (Ang et al., 2007; Hansen, Rockwell, & Greene, 2000). The concept is not people-bound: Culturally competent individuals and

Table 7.2 Boosting cultural competence against defensive routines in organizations

Facet	People	Systems
Awareness	Disseminate findings like Fig. 7.3	Evaluate awareness training
Knowledge	Structure selection processes	Set socially equitable goals
Skill	New settlers practice job hunting	Leaders model inclusion

groups can be thwarted by culturally *in* competent *systems* (Dreachslin, Weech-Maldonado, & Dansky, 2004; Kumaş-Tan, Beagan, Loppie, MacLeod, A., Frank., 2007). Derived in Table 7.2 are some recommendations about how cultural competence in systems and people can be enhanced (Kealey, Protheroe, McDonald, & Vulpe, 2005).

Awareness can be raised by research itself (Lefkowitz, 2008). Presenting Fig. 7.3 to Human Resource professionals and selectors may expose unwanted assumptions, and enable the discussion and resolution of previous unmentionables (Carr, 2004). Defensive routines are countered by presenting alternative perspectives, which expose biases from end-user points of view (Nickerson, 1999). Perspective-taking has changed attitudes by selectors toward new settlers in the Netherlands (Evers & van der Flier, 1998). For these attitudinal changes to sustain, and translate into work behavior, systems can monitor changes in their own practices and provide incentives to reinforce them (“evaluate awareness training”).

Knowledge: an effective way to reduce bias is by structuring selection processes, for example, through situational interviews (above). Developments can be reinforced by the organization, for example, by setting and incentivizing organizational diversity goals (Latham, 2007).

Skills are developed through practice. Cross-cultural training is more effective, for instance, the more it resembles work itself, in say role-plays and simulations, than when it is conveyed by lectures alone (Carr, 2003). From Table 7.2, new settlers can be trained in skilfully applying for jobs (Bennington & Wein, 2002). Organizational leaders can model appropriate attitudes and behavior (Morris & Robie, 2001, p. 114), denoted in Table 7.2 by leaders modeling inclusion.

Brain Drain?

Why the Term is Misleading

Realities like brain waste suggest that debating “brain drain” may embody policy assumptions of its own – for instance equating brains with work performance. Meta-reviews of the linkage between brain power (previously “IQ”, today “general mental ability”) and individual work performance, involving thousands of employees and a wide range of occupations, show brains *contribute* to work performance. However the *amount* they contribute, whilst impressive, is less than overwhelming. Mean effect sizes in the studies, conducted in popular countries for new settlers (the US and inside the EU), range between 0.5 and 0.6 (Bertua, Anderson, & Salgado, 2005;

Salgado, Anderson, Moscoso, Bertua, & De Fruyt, 2003). Based on such statistics, general mental ability would account for approximately 25–36% of the total variation in employee performance, over jobs in general. Focusing on skilled professions (as in skilled new settlers), the range widens. Mean effect sizes are not settled, ranging from 0.30 (9%) in Hülshager et al. (2007) and 0.58 (34%) in Schmidt & Hunter (2004), to 0.74 (55%) in Bertua, Anderson, & Salgado, (2005). Whatever the true score however, “The central question is what *other* factors . . . account for the rest of the variance” (Furnham, 2008, p. 204, emphasis added).

How the Term is Misleading

Clearly brains don’t drain, people do, and bring with them a whole range of additional social capital and human performance factors (UNDP, 2009, p. 13). Clues about some of those factors are contained in a literature on “job competencies”, including professions (Meyers & Houssemand, 2006). Competencies are more specific to work than general mental ability (Fleishman & Reilly, 1992). Examples include leadership, or perspective-taking (Nickerson, 1999). As a rule, such specificity will enhance a measure’s power to predict behaviour, which also tends to be specific (Eagly & Chaiken, 1993). Attributes like leadership skills likely mediate between general antecedents like general mental ability, and the specifics of work performance (Bartram, 2005). Bartram’s model for predicting work performance builds on content and factor analysis in earlier taxonomies of workplace performance (e.g., Fleishman & Reilly, 1992). Bartram has progressively reduced the number of abilities underlying performance, to a “Great Eight”. The name itself may be a misnomer, since there is nothing absolute about such taxonomies. Table 7.3 nevertheless expands our ideas about general mental ability, to include a range of co-predictors, and work consequences.

The participants in Bartram’s meta-analytic research were largely supervisory and managerial, with ratings being made by line-managers of those employees (2005, p. 1189). Such occupations make the resulting taxonomy applicable perhaps to skilled populations like many new settlers. The studies were based in “European countries, the Middle East, the Far East and the United States” (ibid, p. 1189), which are places where skilled new settlers go. The columns in Table 7.3 were linked empirically, in a quasi-simplex pattern (above): Attributes correlated more highly with adjacent competencies than with less proximal sample work performances. The competencies also tended to correlate more highly with sample work performances, compared to classic predictors like general mental ability. The net operational validity in Table 7.3, between attributes and sample work performances, is 0.75–0.79 (ibid, 2005, pp. 1198–1199). Hence in contrast to general mental ability, competencies explained the majority of variance in overall work performance (56–62%).

A basic point of Table 7.3 is that general mental ability is “a” major, but not “the” major predictor of work performance. Table 7.3 further suggests the use of

Table 7.3 From “brain drain” to *mobile work competencies* (Source: Extracted and Adapted from Bartram, 2005, *N* = 4,861)

Predictor attributes	Competencies	Sample work performances
<i>General mental ability with:</i>		
Openness to new experience	Analyzing and interpreting	Parses complex problems Quick on technology uptake
	Creating and conceptualizing	Works well in new situations Seeks learning opportunities Drives organizational change
Conscientiousness	Organizing and executing	Plans ahead, meet goals and delivers quality work
Extraversion	Interacting and presenting	Has networking effectiveness Successfully influences others
<i>Extraversion with:</i>		
Need for power	Leading and deciding	Initiates action, directs Takes responsibility
Emotional stability	Adapting and coping	Responds well to change and setbacks
Agreeableness	Supporting and Co-operating with teams and clients	Puts people first, works well
Need for achievement^a	Enterprising and performing	Seeks opportunities for career advancement

^aThis is linked to *non-Agreeableness*; it is the inverse of Agreeableness.

Key: Emboldened attributes, competencies and thus performance aspects may be more mobile, based on the literature reviewed in this text.

existing literature to derive predictions about which competencies *are most mobile*. Empirically from Table 7.3, *openness to new experience* will predict global mobility (Tharenou, 2003). Other attributes in the Table, *need for power* and *need for achievement*, have also already been linked with relative global mobility (Frieze & Li, this volume). Remaining abroad, and in that sense *staying* globally mobile, may be linked to *emotional stability*, in particular via intercultural adjustment to culture shock (Berry, this volume; Furnham, this volume). Hence Table 7.3 shows a range of globally mobile competencies. Because these competencies also translate into a range of work behaviors (Table 7.3), the debate on brain drain needs radical overhaul to bring it up to speed with a concept of competency flow. From Table 7.3, problem-solving, change management, effective leadership, and personal resilience are liable to be of interest to many organizations.

Those organizations will also be interested in the charting of how mobility itself influences the development of competencies. Just as competencies may actually play a part in motivating and enabling global mobility, mobility itself may foster experiences that cultivate the competencies themselves. This would be a form of “reciprocal determinism”, in which competency influences mobility and mobility influences competency (Latham, 2007). Leading career development theorists

have conducted research which documents a range of skills and other competencies that appear to be enhanced during overseas experiences (Inkson, Arthur, Pringle, & Barry, 1997). Inkson and colleagues have furthermore argued that the influences of self-initiated travel may be more salient, and relevant, than conventional expatriate assignments organized by a company or aid agency. Although such studies do not necessarily focus on the competencies in Table 7.3, or on skilled workers and occupations per se, they do suggest a more dynamic, recursive model for competency flow than unilateral brain “drain” (Thorn, 2009).

Just as general mental ability is not the only ability in town, ability is not the only attribute. According to Latham (2007), an axiomatic equation for work performance is *Job Performance = ability x motivation* (Maier, 1955). Needs for power and achievement are more like motivation than ability, perhaps. Work motives have a history of being studied in psychology, including links to global mobility (e.g., McClelland, 1961; Tidrick, 1971). These have recently been expanded into a theory of “mobile personality” (Frieze & Li, this volume). Traits like this have a potential to contribute to the economy (McKenzie, Gibson, & Stillman, 2006). McKenzie et al.’s research was set in Tonga, where a lottery system decides who may emigrate (in this case, to New Zealand). Compared to Tongans who did not choose to enter the lottery but had similar human capital (e.g., education levels), lottery applicants already earned more income those who did not apply, suggesting economic roles for “unobserved labor market attributes such as ability and drive” (2006, p. 37).

The study found additional income gains from new settlement. However in subsequent research across three Pacific countries, Gibson and McKenzie (2009) argue that potential income gain per se may be less salient as a personal motivator than other human factors, including risk aversion and family considerations. Those motives have been studied in detail in the Talent Flow Program (Inkson et al., 2007). The program focused on emigration and on staying abroad versus returning home (Jackson et al., 2005). Based on a survey of $N = 2,201$ skilled New Zealanders living and working around the world, Jackson et al. found that pushes and pulls on globally mobility could be reduced to five key motives: *Lifestyle* and *family* predominantly pulled people towards home. *Career*, *cultural experience* and *economic factors* tended to keep people abroad. Jackson et al. also recognized the possibility in other contexts of political influences and stronger family ties in the host country (Baruch, Budhwar, & Khatri, 2007). In short therefore, there is a diversity of motives for global mobility, some of which are work focused and all of which have the potential to bear on workplace performance.

What New Foci Can Be Included?

In a study of competencies in Table 7.3, participants ranked the importance to them of achievement, power, money, lifestyle, family and friendship (Carr et al., 2005). Mean ranks were compared against different levels of intention to stay abroad versus return home (to New Zealand). With the exception of lifestyle, there were statistically significant co-variations ($p < 0.001$) between mean ranks and intention to

return home (Carr et al., 2005). Complementing and clarifying detail in the factors reported in Jackson et al. (2005), staying offshore was linked to higher values for achievement, power and money. Pulls home were stronger to people valuing friendship and (to some extent) family (Inkson et al., 2007).

Figure 7.4 highlights achievement motivation and affiliation. These interact, eventually criss-crossing at the highest intent to stay offshore. Intention to remain offshore is stronger among those ranking achievement higher, and friends lower.³ In the long run, unless replaced by similarly endowed new settlers, the eventual outcome of such tendencies may be a net loss of enterprise values (Inkson et al., 2007).

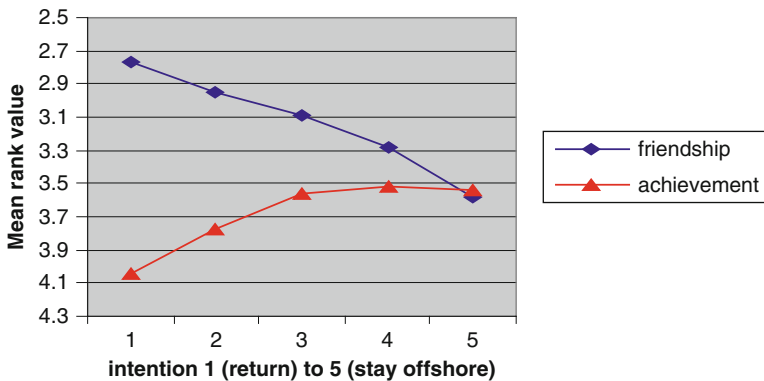


Fig. 7.4 Achievement and friendship affiliation by intention to stay abroad versus return home (Note: A numerically lower mean rank denotes a higher priority. Source: Carr et al., 2005)

Which of the six above priorities was most salient? Decision Tree Analysis is a marketing technique designed for datasets that include ordinal measures. It identifies meaningful clusters (or “splits”) in participants within a dataset. CHAID (for Chi-squared Automatic Interaction Detector) performs the split exhaustively, sometimes creating interpretative problems when a dataset is large or complex. An alternative is CART (for Classification and Regression Trees). CART identifies optimally informative splits that are binary (Statsoft, 2005). The analysis “emphasises strong results without over-capitalising on chance” (The Measurement Group, 2005). Figure 7.5 presents a CART analysis for the Talent Flow dataset.

What Fig. 7.5 tells us is that among the priorities sampled, the most informative predictor is achievement. The sample can be split into at least two main groupings, or segments: One identifiable segment ranked achievement first or second, and the modal intention category for these individuals was to be undecided about returning home. A different segment, however, ranked achievement third to sixth (last), and was modally intending to return home. For a nation concerned about retaining not

³Affiliation includes family as well as friends. However in this study, family was ranked highly both by those intending to return and by those intending to remain offshore, possibly because they had established new family affiliations there.

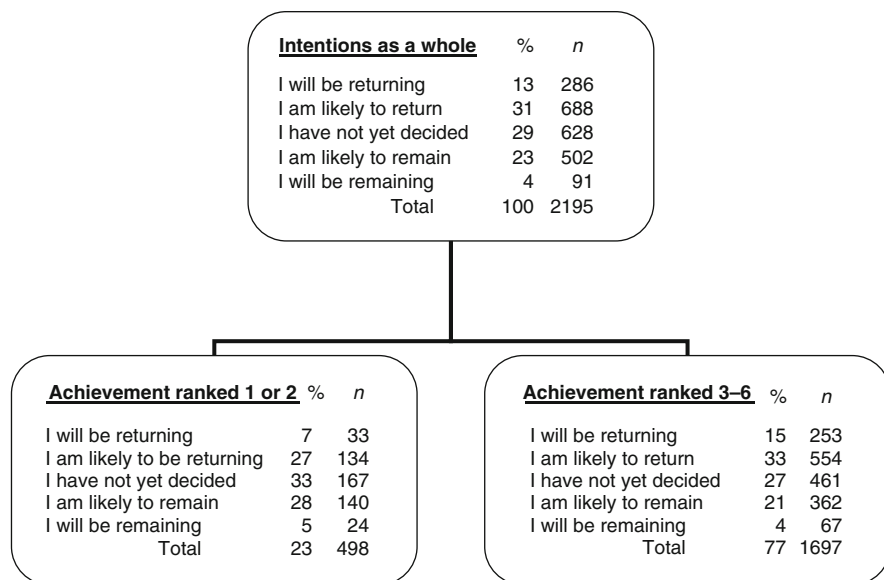


Fig. 7.5 A CART analysis of which priorities may predict return mobility (*Source: Carr et al., 2005*)

just brains but also the motivation to achieve, and what it represents in terms of, say, enterprise performance (Table 7.3), information like this might be of some concern to governments and business roundtables alike. However Fig. 7.5 also indicates room for manoeuvre. Among those who value achievement the most highly, the modal tendency is “undecided”. Hence analyses like Table 7.3 can help in targeting those enterprising individuals who also happen to be currently undecided.

Elsewhere, the Talent Flow Program has suggested that countries are organizations, with policies that attract and retain career capital to varying degrees (Inkson et al., 2007). In the same way that organizations can experience spirals of attraction-selection-attrition (Schneider et al., 1998), countries which stress human relations may end up attracting proportionately more human capital in that domain than in, say, enterprise development (Carr et al., 2005⁴). Table 7.3 and Fig. 7.5 suggest that policies can be designed to attract a more even-handed even blend of attributes and competencies. Competency mixes onshore can draw from theories of vocational “fit”, including the provision of opportunities for motives (like achievement) to be expressed in the home economy (Matter, 1977; Frieze & Yu Li, this volume).

Included in the incentives for that mix of motives is relative earning power. In the talent flow research, money was ranked higher with stronger intentions to remain offshore versus return home, presumably through higher earning potential offshore (Carr et al., 2005). Another study conducted in Oceania reinforces the same point.

⁴The intellectual credit for this idea is Kerr Inkson’s.

A major barrier to skilled workers returning home to Papua New Guinea was the dual salary system remaining in place there (Gibson & McKenzie, 2009, p. 36). Hence we come full circle back to our first elephant in the parlor, and a fresh reminder that alongside disciplines like economics, psychological research has a role to play in developing policies that promote the balance of competency gains.

Conclusion

This chapter identifies three psychological elephants in the parlor for contemporary research and practice in global mobility. The chapter is biased because it focuses on skilled rather than unskilled labor. Nevertheless, millions of people worldwide, unskilled and skilled have immediate colleagues whose salaries are grossly discrepant from their own. That disparity will help to spur them to mobility. Social equity may help stem the flow. Once mobile and abroad, large numbers of skilled new settlers are over-promised and under-delivered on equal access to full employment. The potential “migration-development nexus” is short-circuited by workplace prejudice and discrimination, to defend similarity, identity and dominance. Combating such defensive routines requires multi-level interventions, aimed at restoring workplace justice. This includes culturally competent employment policies, and structured workplace selection. Cessation of mobility (quiescence) is often about resolving a dilemma of affiliation (family, friends) versus achievement (and career). Individuals with equivalent brain power will take different journeys depending on their characteristic motives. New techniques help gauge the right marketing mix for a fitting blend of competencies to work.

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Chapter 8

The Psychology of Enforced Mobility

Wendy Ager and Alastair Ager

My home is in Mozambique, but I can't be free there

(Mozambican refugee, Malaŵi, 1991).

I came from a place where everyone knows my name, to a place where no one knows me at all. Sometimes I hear people calling my name in the neighborhood where I live but I find out that it's only the wind

(Somali refugee woman, Canada, 1994).

It is hard when people don't understand why you left your home. They think you came for bettering things, something like that. You are more miserable here than you were at home – it makes you feel the burden very heavy

(Rwandan refugee, Scotland, 2002).

Newspapers and politicians say we should go home. Do you think that if our home was safe, we would want to come here? No. We would be in our home. One day I hope to go home and build a place where homeless people can go

(young refugee, London, 2002).

Abstract One of the earliest accounts of the psychological and social issues faced by refugees is Kraus's pre-war study of forced new settlers fleeing to the USA from Nazi Germany. The analysis is interesting from a number of standpoints, but none more so than its title, 'Starting life anew in a strange country'. For many this phrase will capture something of the motivation for flight, and perhaps also the challenge, of the forced new settler. But it also suggests common misconceptions regarding the experience of flight, refuge and settlement. "Fleeing for one's life" is in part an act of personal, physical survival. But it also carries with it the potential for once more – or perhaps for the first time – being able to shape one's story, to (re)construct identity, trajectory and meaning. This life, however, seldom involves

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“starting life anew”, as it brings with it experiences that are a foundation for the future. Furthermore, the “strangeness” of the country seldom turns out to be the major determinant of wellbeing and settlement. In this chapter we seek to present historical and current conceptualizations of the experience of forced new settlers that draw together the contribution of psychological, social, economic and political factors. We illustrate these with respect to a number of discrete case studies of specific contexts of enforced migration. Firstly, we look at Mozambican refugees in Malaŵi from 1988 to 1992 and discuss our survey conducted across two very distinctive areas: one comprising refugee camps in Mangochi District and the other integrated settlements – Mozambicans living alongside Malaŵians in existing villages – in Ntcheu District. One of the most valuable insights from this work was recognition of the potential value of a psychological perspective on a humanitarian discourse, which to this point had been dominated by other social sciences. Secondly, we discuss work done following a volcanic eruption in Montserrat. The focus here was on the one-third of the population who remained on the island, internally displaced onto harsh, previously sparsely populated land to the north of the island. A situational analysis suggested that distress was most tangibly linked to the loss of human, social and cultural resources rather than to acute exposures to overwhelming events. Thirdly, we look at unaccompanied young people seeking asylum in Scotland. Reflecting the themes of the Psychological Working Group (PWG) framework, support spanned developing human capital (support to enter educational or vocational programmes), social capital (providing a reliable source of social support and opportunities to extend networking as people settled into the city) and cultural capital (using an art exhibition and a music video project to explore shared values and aspiration as young people displaced to the city). Finally, we seek to draw together some practical outworkings of such analysis in work with refugees and other forced migrants.

Keywords Refugee · Psychosocial · Integration · Case studies · Policy

Abbreviations

DFID	Department for International Development
IASC	Inter-Agency Standing Committee
IDPs	Internally Displaced Persons
PWG	Psychosocial Working Group
RENAMO	Mozambican National Resistance
SRC	Scottish Refugee Council
UNHCR	United Nations High Commissioner for Refugees

One of the earliest accounts of the psychological and social issues faced by refugees of which we are aware is Kraus’s pre-war study of forced new settlers fleeing to the USA from Nazi Germany (Kraus, 1939). The analysis is interesting from a number of standpoints, but none more so than its title, ‘Starting life anew in a strange country’. For many this phrase will capture something of the motivation for flight,

and perhaps also the challenge, of the forced new settler. But we believe that it also suggests common misconceptions regarding the experience of flight, refuge and settlement. “Fleeing for one’s life” is in part an act of personal, physical survival. But it also carries with it the potential for once more – or perhaps for the first time – being able to shape one’s story, to (re)construct identity, trajectory and meaning.¹ This life, we will suggest, seldom involves “starting life anew” as it brings with it experiences, some painful and debilitating but others the source of resilience and capacity, that are a foundation for the future. Furthermore, the “strangeness” of the country seldom turns out to be the major determinant of wellbeing and settlement. It is not so much exotic unfamiliarity that creates challenges for the forced new settler – though this may be an initial obstacle – but more often the structural barriers of racism, insecurity and under-employment. In the following sections we seek to present historical and current conceptualizations of the experience of forced new settlers that draw together the psychological, social, economic and political factors shaping outcomes. We illustrate some of these with respect to a number of discrete case studies of specific contexts of enforced new settlement. Finally, we seek to draw together some practical outworkings of such analysis in work with refugees and other forced new settlers.

The Nature and Scope of Forced New Settlement

The Geneva Convention Relating to the Status of Refugees (1951) is the main legal instrument defining the status and entitlements of a refugee. Two principles – those of protection and of “non-refoulement” lie at the core of the Convention. Article 1 of the Convention states that the protection afforded by refugee status shall be granted to:

any person who owing to a well-founded fear of being . . . persecuted for reasons of race, religion, nationality, membership . . . of a particular social group or political opinion, is outside his . . . country of nationality and is unable . . . or unwilling to avail himself . . . of the protection of that country.

This principle is reinforced by a second, elaborated in Article 33, regarding the concept of “non-refoulement”. This principle establishes the obligation of a country to which an individual has fled to protect a refugee from forcible repatriation.

These legal definitions and obligations significantly shape the expectations and experience, and thus the psychological challenges and adjustments, of refugees.

The Convention was drafted in the aftermath of the Second World War by member states of the United Nations, and reflects the language, culture and predominant nature of refugee movements in that period. However, despite significant changes

¹The narratives at the head of this chapter are drawn from Ager, Ager and Long (1991), Canadian Council on Refugees (1998), Ager (2002a) and Newham Children’s Fund (2002) respectively.

in the nature of forced new settlement in subsequent decades (for example, mass population movements following outbreaks of military conflict), the Convention remains the fundamental framework with respect to which policy and practice is developed.

The Convention allows states considerable discretion in determining the status of refugees and the right to asylum and in interpreting their responsibilities and obligations. A number of analysts (Richmond, 1994; Westin, 1999) have demonstrated that behind the rhetoric, the policy of most governments is to limit refugee entry. Increasing regulation of international new settlement based on the perception that refugees are an especially threatening category of new settler means that legislation often focuses on “deterrence, restrictionism and containment” (Zetter, in Ager, 1999 p. 76).

The term “refugee” is generally used in everyday speech to describe people who have been forced from their homes, whether across borders or internally displaced, because of conflict or disaster.² The United Nations High Commissioner for Refugees (UNHCR), the United Nations body mandated to oversee work in this area, in fact identifies seven population categories,³ collectively referred to as “persons of concern to UNHCR”. These include: (a) refugees (that is those people who have refugee status), (b) asylum-seekers (that is those people who are seeking asylum within a particular state), (c) internally displaced persons (IDPs), (d) refugees who have returned home (returnees), (e) IDPs who have returned home, (f) stateless persons, and (g) other people who do not fall under any of the above categories but to whom UNHCR seeks to extend its protection or assistance. These are important legal and political distinctions, though the psychological challenges of uprootedness will be shared across many of these categories. For example, internally displaced persons are people who have been forced to leave their homes, as a result of armed conflict, situations of generalized violence, violations of human rights, or natural or human-made disasters, but who have not crossed an international border. Their legal situation is radically different from that of someone displaced across an international border, but challenges of loss of livelihood, fragmentation of family, and fear of hostility may be very similar.

Current figures⁴ indicate that 42 million people were forcibly displaced worldwide at the end of 2008. This included 15.2 million refugees, 827,000 asylum-seekers (pending cases) and 26 million internally displaced persons. Nearly 25 million people – 10.5 million refugees and 14.4 million internally displaced people – were receiving protection or assistance from UNHCR at this point. Contrary to popular misconception, most refugees remain within “their” region

²In this chapter we will follow this convention in using the term “refugee” for all categories of forced new settler.

³Elaborated to nine in 2007.

⁴2008 Global Trends: Refugees, Asylum-seekers, Returnees, Internally Displaced and Stateless Persons Available at <http://www.unhcr.org/4a375c426.html>. Accessed 22 September 2009.

of origin; it is estimated that more than three-quarters of the world's refugees seek asylum in neighbouring countries or their immediate region. Developing countries are host to four-fifths of the world's refugees. In 2008 women and girls represented approximately half of persons of concern to UNHCR, and 44% of refugees and asylum-seekers were children below 18 years of age. Although these figures represent something of a decrease from the total numbers of displaced of concern to UNHCR in the mid-1990s (Westin, 1999), they nonetheless confirm those forcibly displaced from their homes to represent a significant proportion of the global population. Not only significant in number, refugees face unique legal, political and, as will be considered in the next section, psychological challenges.

Psychological Perspectives on the Experience of Refugees

There have been significant shifts in psychological understandings of the experience of refugees over recent decades. This partly reflects findings, as outlined in the course of this chapter, but also trends in forced new settlement in the latter years of the twentieth century that have required refugee movements to be seen in terms of displaced communities and populations rather than individuals. This period has also seen the development of a vocabulary that – rather than using psychiatric illness as the prime indicator of adjustment – addresses broader issues of “psychosocial wellbeing”, considering social and psychological factors interacting at individual, family and community levels (Ager & Young, 2000; Ahearn, 2000).

A key contribution to this development was in 1986 with Harrell-Bond's powerful analysis *Imposing Aid*. Although broadly acknowledged for its critique of the dehumanizing effects of humanitarian practice, this work acutely exposed the contradiction of a prevailing “over-socialized view of man” (p. 285). She saw this view as making two implicit assumptions. Firstly, the “social nature of man” will ensure that an equitable distribution of available resources will quickly establish itself, no matter how limited those resources are. Secondly, despite debilitating circumstances, people will always create supportive systems, and act as responsible autonomous individuals. Human suffering was understood therefore in terms of social and cultural processes that were generally assumed to be adaptive and functional, and consequently defined as outside the scope of humanitarian action. On this basis the significance of bereavement and the importance of mourning rituals, for example, were not accommodated within humanitarian programmes. Harrell-Bond's analysis – perhaps most effective because it came from an anthropological foundation – asserted the need for an acknowledgement of a “common humanity”, by which experiences of loss, separation, grief and fear were appropriately addressed in humanitarian response.

There followed numerous attempts to provide organizing frameworks to address such issues in a manner that appropriately acknowledged both the “common

humanity” that Harrell-Bond asserted and the reality of widely divergent contextual and cultural circumstances. In a commissioned review for Harrell-Bond’s Refugee Studies Programme (later Centre) on behalf of the Harvard World Mental Health project (Desjarlais, Eisenberg, Good, & Kleinman, 1995), for instance, we used the idea of discrete “phases” of the refugee experience – pre-flight, flight, temporary settlement and resettlement (or repatriation) – to organize evidence regarding the influences on the mental health and broader psychosocial wellbeing of refugees (Ager, 1993). The framework presented material in a manner that foreshadowed many themes in later writings: there were recurrent and predictable threats to the wellbeing of refugees through these phases of experience; refugees – notwithstanding their vulnerability – possessed, especially through social and cultural linkages, significant resources, and building upon use of such resources was generally the most appropriate and effective strategy for assistance.

In analysis of the “phases” of refugees’ experience, the final phase – that of resettlement or repatriation (potential “durable solutions” for refugees, UNHCR, 2003) has appropriately come under particular consideration. Berry and colleagues (Berry, 1991; Berry, this volume; Dona & Berry, 1999) developed a framework to consider refugee adjustment in this “final” phase in terms of the process of acculturation. They describe the alternate strategies available to refugees in connection with, on one hand, attempts to maintain their cultural identity and characteristics and, on the other, attempts to establish relationships with other groups (often a host “majority”). The resolution of these issues establishes different trajectories. When refugees seek to maintain a distinct cultural identity and do not relate to other communities, this leads to *separation*; where refugees retain neither links with their own cultural community nor other majority communities, *marginalization* is the result; where refugees abandon distinctive cultural identity and focus upon identification with host communities it is a strategy of *assimilation*. Berry and colleagues (Berry, this volume) suggest that evidence supports better adjustment outcomes with a strategy of *integration*, where refugees both maintain their own cultural identity and effectively relate to host communities.

The notion of integration has been increasingly contested, however, as it has become an explicit goal of much refugee and immigration policy. In a mapping exercise of literature about integration, Castles et al. (2002) note that the term is used with little consistency, with a diversity of alternative understandings identified from assimilation to inclusion, adaptation through to concepts of citizenship. Our own work described later in this chapter on the *Indicators of Integration* programme (Ager & Strang, 2004a, 2008) was an attempt to address something of this inconsistency.

If *integration* has come to be seen as one major conceptual tool for understanding processes of adjustment for refugees, then *psychosocial wellbeing* has clearly become another. Ahearn’s (2000) review of studies from 1989 to 1996 measuring adjustment outcomes for refugees indicated that most measures focused on stress, depression and trauma, “highlighting weakness and pathology rather than strength and health” (p. 5). There was no scale for positive psychosocial wellbeing identified

in his review. The words “trauma” and “traumatized” have become a major focus for critique in this respect (Bracken, Giller, & Summerfield, 1995; Ager, 2005). For some, these terms powerfully describe the disruption that occurs in people’s lives following crisis events, and the vulnerability of populations following such exposure (Mollica et al., 2004). For others, however, they risk focusing attention too narrowly on psychological disorders at the expense of broader issues and impacts, and disempowering people by locating the source of healing in external, technical measures.

The Psychosocial Working Group (PWG⁵) was a collaborative initiative between researchers and humanitarian agencies that sought to develop a more holistic framework to integrate these emphases in approach. We identified from field studies three resource domains which across varied settings were typically seen as key determinants of psychosocial wellbeing, namely: human capacity, social ecology and culture & values (PWG, 2003; Ager, Strang, & Abebe, 2005). Each represents a community resource that is commonly depleted in the wake of displacement, but which also serves as a critical basis for recovery. Thus human capacity is reduced by disruption of livelihoods following flight, and the mental ill-health that commonly accompanies loss. However, the remaining skills and capacities of refugee populations are widely found to be a key element in coping well in the aftermath of a disaster or conflict. Similarly, the social ecology of a community – kinship relationships and supports, community institutions – are inevitably disrupted by forced new settlement, but the linkages that remain consistently prove a core determinant of resilience. The culture and values of communities are commonly eroded by the experiences of violence and political oppression, but traditions and shared beliefs have been shown to be a key resource for good outcomes. The framework has prompted an approach which seeks to develop psychosocial wellbeing by supporting community processes of resource utilization and acquisition (building upon Hobfoll’s (1998) notion of “resource acquisition spirals”), rather than dependence on external inputs for recovery.

The Inter-Agency Standing Committee (IASC) Guidelines on Mental Health and Psychosocial Support in Emergency Settings, published in 2007 and involving a number of those involved in the earlier work of the PWG, have now solidified this sort of understanding to bridge between previously conflicting approaches. The IASC guidelines (2007) set out a framework that outlines steps to be taken before emergencies occur, describes minimum responses during the acute phase and then suggests comprehensive responses to be undertaken during early reconstruction phases of an emergency. Actions are seen to be relevant at four discrete levels (see Box 8.1), which correspond to ascending layers of a “pyramid” (see Fig. 8.1) representing increasingly smaller proportions of an affected population. The framework has been widely adopted by humanitarian agencies (see Wessells & van Ommeren, 2008; Ager, 2008) and, although of much broader application than with refugee

⁵www.forcedmigration.org/psychosocial.

populations alone, stands to significantly shape response and conceptualization of interventions in this area.

Box 8.1 Interventions appropriate for different groupings within refugee populations

1. *Basic services and security.* People's wellbeing is protected through meeting their basic needs and rights for security, governance, and essential services such as food, clean water, health care and shelter.
2. *Community and family supports.* A smaller number of people may need to be helped in accessing key community and family supports. Due to the disruption usually experienced in emergencies, family and community networks may be broken.
3. *Focused supports.* A still smaller number of people will in addition require supports that are more directly focused on psychosocial wellbeing. This might be individual, family or group interventions, typically carried out by trained and supervised workers.
4. *Specialized services.* At the top of the pyramid is additional support for the small percentage of the population whose suffering, despite the supports mentioned already, is intolerable and who may have great difficulties in basic daily functioning.

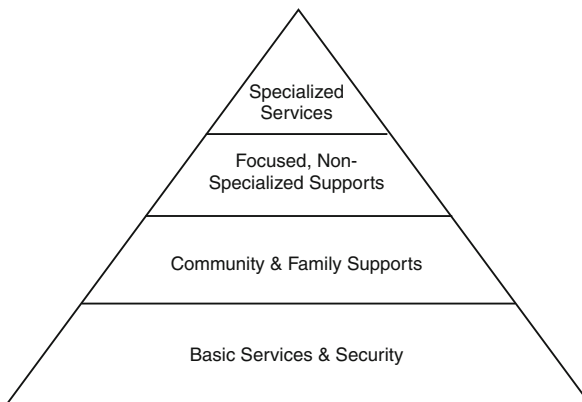


Fig. 8.1 Different levels of support required in comprehensive response to mental health and psychosocial needs of refugee communities (after IASC, 2007)

Case Studies in Enforced Mobility

How do these frameworks and conceptualizations inform our understanding of the experience of forced mobility? We have chosen to address this question by using a series of case studies drawn from our work with refugee communities over the last twenty years. In each case study we seek to present something of the unique features of displacement and circumstance that shaped experience but, using ideas drawn from the above analysis, something also of the common themes and challenges faced by refugees from a broad psychological perspective.

Flight from Civil Conflict: Mozambicans in Malaŵi 1988–1992

Civil war began in Mozambique shortly after independence in 1975, but the level of military activity sharply increased through the 1980s with support of the Mozambican National Resistance (RENAMO) by the Republic of South Africa. 1986 saw the beginnings of massive influx of Mozambican refugees into the neighboring country of Malaŵi. 1990, with growing concern about reported levels of sexual violence by RENAMO forces, saw the first contact by UNHCR with the Psychology Department at the University of Malaŵi, with advice being sought on potential means of data collection to quantify such abuses. At that time in Malaŵi, psychology – demonstrating Harrell-Bond’s concern over the dominance of an “over-socialized model of man” (1986) – was not considered “developmentally relevant”.⁶ However, this initial contact established a credibility and linkage that led the following year to a commissioned study of the impact of displacement on Mozambican refugee women in Malaŵi (Ager, Ager, & Long, 1991). By that time there were approximately 1 million Mozambican refugees living in Malaŵi (with a total population of around 8 million).

We surveyed 420 refugee households across two very distinctive areas: one comprising refugee camps in Mangochi District and the other integrated settlements – Mozambicans living alongside Malaŵians in existing villages – in Ntcheu District. In a household survey we collected a wide range of data regarding household composition, education levels, income and health. Our psychological perspective was most closely reflected in work undertaken with a focal sample of 20 individuals – chosen to be representative of the larger surveyed population – who were selected for more detailed in-depth, semi-structured interviewing and a time-use measure completed through participant observation.

Most refugees had been living in Malaŵi for around five years at the time of the study. Our study found clear gender differences with respect to education, productive activity, and health, and existing refugee policy and practice appeared to further disadvantage women and female-headed households. Food distribution

⁶The UK Overseas Development Administration classified university disciplines as developmentally relevant or otherwise as a basis for ascertaining eligibility of funding support.

was a key aspect of the refugee experience, representing both the focus of survival and the exercise of power. Procedures for distributing rations were hampered by logistical problems as well as power relations between individuals, where men dominated in an area which was traditionally women's responsibility and there were regular reports of "tippers" favoring certain groups in the distribution of rations.

The in-depth interviews and period of observation with the focal sample elaborated and triangulated the findings of the survey. Interviews covered such topics as life in Mozambique before flight, circumstances of flight, settlement in Malaŵi, productive activities, food, and the future. The narratives confirmed that before hostilities had led to disruption and eventually flight, most people had led self-sustaining lives, growing plenty of food for themselves and having good houses. They were forced to flee when soldiers attacked their villages. Many people had witnessed atrocities, and we were drawn to note these accounts. However, refugees generally emphasized the challenges of their current existence. In Malaŵi a major concern was food supply and quality. Most people were eating less than they did at home because they received low rations. Thoughts for the future were about peace in Mozambique, and a desire to return, though 'those who just *heard* about the war may want to return soon, but those of us who really experienced it, we must wait until things are really settled' (Ager et al., 1991, p.51).

The analysis of time-use confirmed two major trends that we have since observed in many other settings. First, there were significant differences between men and women, with the latter bearing a significantly greater burden in terms of productive activities (a factor which could also encourage premature withdrawal from school of adolescent girls). Second, those living in integrated settlements alongside Malaŵians found significantly more scope for income-generation than those living in refugee camps. The social connection and cultural bonds between refugees and the host community appeared to play a key role – when proximity enabled it in this way – in promoting economic activity. Such "indigenous" activity certainly seemed more effective than "income-generating activities" offered by external agencies, which for participating women resulted in a median daily income of zero (Ager, Ager, & Long, 1995).

One of the most valuable insights from this work was recognition of the potential value of a psychological perspective on a humanitarian discourse, which to this point had been dominated by other social sciences. With its growing interest in "quality of life" issues, the WHO sponsored follow-up work amongst the Mozambican refugee and resident Malaŵian populations to consider the salience of different categories of need. Given the implicit acceptance of Maslow's "hierarchy of needs" in focusing attention in refugee situations principally on issues of food, health and safety, our findings adopted a framework based upon this model (Ager, 1992, 2000; see Box 8.2). Although physiological and safety needs were a major priority for refugees, they were not generally presented as pre-eminent over needs for belonging and esteem. Indeed, in comparison to the settled Malaŵian population, belonging needs were particularly salient for refugees, marking separation from land, home and kin as major dimensions of the experience of displacement (Ager, 1992, 2004).

Box 8.2 Categories of need amongst Mozambican refugees in Malaŵi

Physiological needs. For example, adequate quantity of food, variety of food, close access to water and fuel, prompt access to health facilities

Safety needs. For example, safety from assault or abduction, security of property, adequate clothing and shelter

Belonging needs. For example, living with intact family, proximity of other kin, experience of friendship, absence of partiality and discrimination

Esteem needs. For example, personal source of income, involvement in productive activity, access to education or training, ownership of non-essential household assets

Transcendence needs. For example, affinity with home and land, sense of personal freedom, awareness of divine providence/blessing, confidence in the future.

Natural Disaster: The Soufriere Hills Volcanic Eruption, Montserrat

Mozambicans in Malaŵi in the late 1980s and early 1990s were, under the terms of the Geneva Convention, clearly refugees with a “well-founded fear of persecution” back in their homeland, and recognized as such by UNHCR and the Malaŵian government. The population that is the focus of the next case study is, in such terms, very distinctive. Residents of the Caribbean island of Montserrat fled their homes in 1997 as a result of increasing activity by the Soufriere Hills volcano; its eruption totally destroyed the capital, Plymouth, during the course of that year. Two-thirds of the population left the island – forcibly displaced, but with no protection under the Geneva Convention – to seek sanctuary and employment elsewhere in the Caribbean or within the UK (mobilizing a Voluntary Evacuation Scheme on the basis of the island being a British overseas territory). The focus of the second author’s engagement was, however, on the one-third of the population who remained on the island, internally displaced onto harsh, ridged and previously sparsely populated land to the north of the island.

This internally displaced population was – with many younger, more economically active residents having moved off the island – economically dependent (with large numbers reliant on welfare assistance), ageing (nearly 20% over 60 years of age), and fragmented (approaching 60% of children living in single-parent households). The social infrastructure of the islands – schools, clinics, recreational facilities – was similarly depleted with loss of key staff exacerbating physical damage. The UK Department for International Development

⁷ See UNICEF (2010) for guidance on appropriate use of such methods.

(DFID), tasked with supporting economic and social recovery on the island, received a request in 1999 to support the provision of counselling services to assist this population in their recovery from the traumas of the eruption and its consequences.

Although the psychological needs of forcibly displaced persons remained somewhat tangential to the main focus of DFID's strategy (DFID, 1999), there were many indications (from patterns of general ill-health and behavioral patterns amongst school children to frank admissions by those interviewed) that many on the island were experiencing high levels of stress. However, analysis suggested that such distress was most tangibly linked to the loss of human, social and cultural resources rather than to acute exposures to overwhelming events (see Box 8.3). The displaced were separated from their families. Economic opportunities were significantly restricted. The strong Christian values of the islanders were challenged by fragmentation of institutions. The self-regulation of close-knit interdependent communities was mourned. Foreshadowing the formulation of the PWG framework and IASC guidelines some years later, recommendations for recovery were focused on identifying residual capacities, and seeking to facilitate their deployment in reversing the "downward spiral" experienced (Ager, 1999). This included building upon the strong pastoral visitation culture established across the island; equipping teachers and health workers with strategies to address the common challenges faced by those in their charge; seeing community engagement in public works projects and recreational activities as a key means of restoring a sense of agency; and re-establishing linkages with the Montserratian Diaspora to retain a common sense of culture and belonging (see Box 8.4).

Box 8.3 Identified threats to children's wellbeing

The second author was invited to meet and assess a number of children whose behaviour was causing challenges in the home and at school. Adopting a common methodology at the time,⁷ children were invited to draw one picture to illustrate "happy times" and another times when they were sad or fearful. Knowing of stories of towering ash clouds and fiery lava flows, some pictures of flight from the volcano were anticipated in the latter category. There were none. But there were pictures of unexpected suffering, like a rat eating away part of a child's clothing overnight, while they slept in emergency shelters that remained their home for several months. Other children spoke of gang fights between children originally from different schools now forced to share the same "territory". Such images pointed to the connectedness of psychosocial wellbeing to material and social circumstances as much (if not more) than exposures to life-threatening situations.

Box 8.4 Symbolism in cultural loss and adjustment⁸

Historically Montserrat was divided into four parishes, each served by its own church. Three had been rendered uninhabitable, and thus four congregations shared a service together in the northernmost parish on the island. At communion time, four communion cups were prepared and each congregation gathered together in a different section of the church. However, in early 1999, with one parish under meters of ash and two others considered uninhabitable for an indefinite period, it was agreed to move on to accept the new reality, and thus identity, facing the islanders. The communion cups were rededicated, and the congregation drawn from across all four parishes shared a single cup at communion.

Seeking to Make a New Home in Scotland

The previous case studies have focused on the majority of forced new settlers whose circumstances see them displaced within their own country or within a neighboring one. However, the movement of refugees to seek resettlement in a more distant setting, potentially with very different economic, climatic and cultural conditions, is very important both geopolitically and in terms of available literature. Our own work with respect to such patterns of refugee movements has focused on Scotland, in the United Kingdom. The first author used Berry's acculturation framework to structure analysis of strategies adopted by refugee families in seeking resettlement in Scotland (Ager, 2002a, 2002b). Interviews with parents and children highlighted the complexities of different family members having distinctive capacities, experience and expectations to deal with challenges, which regularly featured experience of racist abuse and the complexities and uncertainties of the immigration system. Children were much more likely to fit Kraus's earlier vision of someone positively "starting a new life", with a major theme of parents' discussion being "I have lost so much more than I have gained" (2002a, p. 48). Fieldwork in Pollokshaws in Glasgow (Ager & Strang, 2004b) was also a major source of data informing the Indicators of Integration work of the second author noted in the next section. This work provided insight into the varied population groups resident in areas into which refugees settle (including distinctive groupings of the "host" population that may have very different perspectives on such inward new settlement). It also indicated the potential role of very basic forms of social "mixing" (e.g. greetings, shared use of public space) in enabling a sense of security and belonging in an area.

⁸ Interview with representative of Montserrat Christian Council, 25 March, 1999.

The focus here, however, is the specific circumstances of unaccompanied young people seeking asylum, development of services for which was the focus of the first author's work 2002–2004. The Immigration and Asylum Act (1999) introduced an asylum dispersal programme to the UK so that the responsibility for asylum applicants might be shared across different cities. The UK government wished to relieve the strain on services on the main entry points to the UK – principally in the south east of England. As a result, in 2000 Glasgow City Council in Scotland entered into a 5-year contract with the Home Office (the ministry responsible for immigration in the UK) to provide 2,500 accommodation units. In the years that followed, people seeking asylum were “dispersed” to Glasgow (no choice in the destination point of dispersal was permitted) and were accommodated in disadvantaged areas of the city. However, encouraged by this formal dispersal process, another group of arrivals were making their way to Glasgow. It was noted with concern that an increasing number of unaccompanied young people were arriving in Glasgow. Between 2001 and 2003 it was estimated that around 70 unaccompanied young people were in the city.⁹

The asylum dispersal programme brought people of diverse ethnic, cultural and religious backgrounds to a city which was predominantly white. The city had received refugees in the past but not in the scale or diversity it now faced and at all levels – across communities, within services, in local and consequently national government policy making – there was much to be done. The murder of a Kurdish man in 2001 was a devastating spur to joint action, and in response Glasgow City Council appointed their Director of Corporate Policy as asylum “Tsar” to coordinate services and policy development.

Glasgow City Council Corporate Policy began to draw key actors together according to major themes – one of them being children. Education services were well organized and were developing strategies to integrate children with hugely varying levels of language competence, educational history, and social and psychological needs. However there was growing concern specifically for unaccompanied children and young people. It was not clear who this most vulnerable group of children was and how the legislative framework in Scotland set against UK-wide legislation in terms of immigration could be translated into safeguarding the rights of these children and young people.

The Home Office defines a child who is unaccompanied as a child under 18 (or if there is no proof, appears to be under 18) outside their country of origin who is not accompanied by a close relative (regardless of whether or not that relative usually cares for the child). The largest group of unaccompanied asylum-seeking children in Glasgow came from Africa and many had been brought to Scotland by an agent. Many did not know that Scotland was their destination and had no idea where they were when they got there, having been promised other things (like for example going to America). It appeared that unaccompanied young people had

⁹See www.scotland.gov.uk/Publications/2008/04/08133832/9 for an update on current circumstances.

often experienced traumatic events in their countries of origin. They felt safe upon arrival in Scotland and were building new lives in an amazingly resilient fashion. However, they faced difficulties arising from unsuitable accommodation, isolation, racism, unfamiliarity with the English language and the Scottish dialect, and the cold climate (Scottish Refugee Council (SRC), 2006). A bus ride into town or a walk to local shops could attract racist remarks and sometimes assaults, for example by young children throwing stones. In a city where to be black was a marker of visible difference from the majority, this was very difficult. (By contrast on a visit to London at this time, some of these unaccompanied young people revelled in the fact on arrival at Kings Cross railway station that they felt they had come home to Africa.)

There was inconsistent care and support for unaccompanied children seeking asylum and it appeared to discriminate against their particular needs. Unaccompanied asylum-seeking children under 16 were usually placed in residential care. Fostering placements were not widely available to meet the needs of this group of children. Unaccompanied young people between the ages of 16 and 18 years received support services from the Homeless Young People's Team and other services. The quality of these services varied and accommodation was not always safe or suitable for their wellbeing. It was difficult to access regular and consistent support from a named social worker.

In these circumstances, groupwork with these unaccompanied minors focused on providing some basic structure and social support that could serve as a foundation to individual trajectories of adjustment in due course. Reflecting the themes of the PWG framework, support spanned means of developing human capital (support to enter educational or vocational programmes), social capital (providing a reliable source of social support and opportunities to extend networking as people settled into the city) and cultural capital (using an art exhibition and a music video project to explore shared values and aspiration as young people displaced to the city). Given the legal and economic challenges faced by such youth these seem like small contributions. But they provided a foundation for youth to gain some agency over their circumstances. Informal follow-up has indicated that five years on some members of this group have secured places on highly competitive higher education programmes and appear to be on course for establishing themselves in Scotland.

Using Knowledge to Shape Policy and Practice

This chapter has documented developing understandings of the psychology of enforced new settlement and has illustrated their outworkings in a range of settings. It is clear from such analysis that this is an arena of political and moral impact. Knowledge about refugee wellbeing and adjustment has, therefore, to be more than an academic concern (albeit a fascinating and complex one). Rather, such knowledge has to be put into action as a means of shaping policy and practice. The chapter

concludes with some illustrations of how the developing knowledge base about the factors that shape the experience of refugees is being made available for use.

Mapping the Process of Integration

It was noted earlier how integration, while one of the key concepts utilized in understanding processes of refugee adjustment, may be used with quite different meanings. This was the core rationale for the Indicators of Integration project (Ager & Strang, 2004a), which was funded by the UK Home Office to develop indicators that would have meaning to government, community and refugee stakeholders, and could potentially be used as a basis to evaluate the effectiveness of interventions to support such outcomes. Of greatest relevance here was the research – involving reviews of proposed definitions of integration, and fieldwork in communities (Ager & Strang, 2004b) that led to formulation of a generic framework specifying core domains with respect to which situation-specific indicators would appropriately be developed (Ager & Strang, 2008). This framework (see Fig. 8.2) embeds a number of key psychological principles. For example, social connection is seen to provide key means of facilitating core integration outcomes such as employment and secure housing. Such social connection, echoing the work of Berry, usefully draws on bonds with one's community of origin as well as bridges into majority, host communities and links with civic institutions. Safety and stability, alongside cultural knowledge (on the part of both hosts and refugees), are key facilitators of integration, while rights and equal treatment under the law provide a key foundation for it.



Fig. 8.2 Core domains of integration (after Ager & Strang 2004a, 2008)

The framework has been adopted by a number of governmental authorities and non-governmental agencies to conceptualize potential support to refugee integration processes, plan interventions and evaluate their impact (Ager & Strang, 2008).

We used analogous processes of stakeholder engagement in work in a very different context in Sierra Leone (Stark, Ager, Wessells, & Boothby, 2009). The population of concern were girls who had been abducted by armed groups during the civil conflict that finally terminated in 2002, many of whom had experienced barriers to their subsequent reintegration on the basis of their war experiences. Using a form of participative ranking, we established four major indicators of successful integration from the perspective of girls: securing a good marriage; invitations to community events; engagement with the local women's *bondo* association; and recovering a "steady head" (often after enforced drug use). Specifying such indicators enabled the effectiveness of an intervention to support formerly abducted girls to be established (Ager, Stark, Olsen, Wessells, & Boothby, 2010).

Training for Psychosocial Support of Refugees

The last few years has seen an increased acknowledgement that staff and volunteers involved in providing "mainstream" services to refugees – be this food distribution, accommodation, education, healthcare – are the key providers also of psychosocial support. As emphasized by the IASC guidelines (IASC, 2007), those requiring referral to specialist services will generally be few. The majority will require varying forms of basic, familial or community support that may be best facilitated by workers with which they are already in contact.

It is on this basis, for example, that the International Federation Reference Centre for Psychosocial Support developed a Psychosocial Training Manual (International Federation Reference Centre for Psychosocial Support, 2009). This manual reflects many of the psychological principles discussed earlier, and suggests practical ways for implementing support based upon them. The seven modules, grounded in a community-based approach, include, for example, consideration of the special needs of children in emergency settings, provide an introduction to psychological first aid, and also discuss the care of staff and volunteers themselves in terms of the impact of working in this field. The manual, designed for use by non-specialists, is accompanied by a range of training materials (case studies, exercises etc.) that seek to support effective dissemination of the core principles of psychosocial work in emergency settings. It is designed for use with refugee and other displaced communities affected by a wide range of crisis events (e.g. natural or man-made disasters, post conflict settings, epidemics).

A range of similar materials is now available. For example, to support the implementation of the IASC guidelines, a 'Global Resource Kit and Orientation Seminar Guide' (Baron, 2009) has been developed, providing materials for training and sample seminars. Given the importance of improved evaluation to strengthen the evidence-base of effective intervention (Ager, 2008), there is also increased

attention being paid to guidance on effective evaluation design and methodology. For example, we recently assisted UNICEF in the development of guidance concerning the evaluation of psychosocial programmes in emergency settings (UNICEF, 2010). This built on their existing monitoring and evaluation systems, but focused on psychosocial wellbeing and highlighted participatory methods and the strengths of using both qualitative and quantitative tools for evaluation.

Conclusion

We began this chapter with the assertion that while enforced new settlement often entails acts of personal, physical survival it also brings with it the potential for once more – or perhaps for the first time – being able to shape one’s story, to (re)construct identity, trajectory and meaning. Through the evolution of psychological understanding of the processes of refuge, we have tracked development of an increasingly sophisticated appreciation of the forces that shape such experience, and the manner in which this should inform assistance. In each of the case studies presented there is major suffering and loss documented. But the resources of affected communities – regrouped and reconstituted as required – remain at the core of observed coping and resilience.

This insight is consistent with the core of the analysis of the 2009 Human Development Report, which calls for an approach which puts people – and thus their aspirations, agendas and resources – at the centre of development. This chapter – and other chapters in the volume – documents the numerous structural barriers (such as racism, poverty, lack of political will to enforce international law, etc.) that impede such development. Policy can clearly focus on the removal of such impediments, knowing that there is strong evidence that refugee communities demonstrate the capacity to exploit opportunities in support of their own development in conditions that support this.

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Part III

Adjustment

Chapter 9

Global Mobility and Cross-Cultural Training

Jan Selmer

Abstract Research has consistently shown that expatriates are regularly assigned to all parts of the world without much cross-cultural training. This is regrettable since cross-cultural training intends to train individuals from one culture to interact effectively with members of another culture and to predispose them to a quick adjustment to their foreign assignments. Without much choice, lacking adequate host cultural and institutional insight, expatriates may have to resort to the same behavioral repertoire as they used in their home country without adjusting to the local norms and practices. This could have negative, if not disastrous, consequences for the expatriates themselves as well as for the foreign operations to which they belong. This chapter uses China as a critical test case as an expatriate destination with possible implications for cross-cultural training in general and in particular for the training of expatriates for other culturally challenging host locations. Appropriately, there is an initial discussion of whether cross-cultural training works or not and the content of cross-cultural training. Succeeding that, based on a number of recent empirical investigations, new dimensions of cross-cultural training are discussed. This is done by applying a systems view of expatriates and various aspects that may affect their cross-cultural training. To begin with, individual dimensions that have to do with the expatriates themselves are discussed. Following that, organizational factors are examined. The succeeding subsection deals with situational circumstances and the section ends with country-level aspects. From the empirical observations and research results of the new dimensions of cross-cultural training, five major conclusions are drawn: cross-cultural training works, culture-specific cross-cultural training may be preferable, cross-cultural training could be custom-made, recurring cross-cultural training may be necessary, and everybody may need cross-cultural training.

Keywords Cross-cultural training · New dimensions · China

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In the age of globalization, there is a wide range to the process and practice of global work. Many individuals work in new cultural surroundings on a temporary basis in many capacities, for long or short periods and for various reasons. Belonging to commercial firms or non-profit organizations, they have at least one thing in common: the cross-cultural encounter which may substantially impact on what they will achieve in the host location. Regardless of their specific circumstances, this chapter will label such individuals “expatriates”. Surprisingly, research has consistently shown that expatriates are regularly assigned to all parts of the world without much cross-cultural training at all (Brewster, 1995; Hutchings, 2005; Selmer, 2000). This is regrettable, since cross-cultural training entails training individuals from one culture to interact effectively with members of another culture and to predispose them to a quick adjustment to their foreign assignments (Brislin & Pedersen, 1976; Black, Mendenhall, & Oddou, 1991). Without much choice, lacking adequate host cultural and institutional insight, expatriates may have to resort to the same behavioral repertoire as they used in their home country without adjusting to the local norms and practices (Black & Porter, 1991; Lawson & Swain, 1985). This could have negative, if not disastrous, consequences for the expatriates themselves as well as for the foreign operations to which they belong.

The purpose of this chapter is to uncover and discuss new dimensions of cross-cultural training based on recent empirical research on expatriation. Since new insights are continually gained regarding expatriates and their assignments through ongoing empirical research, such new knowledge may contribute to more effective planning and implementation of cross-cultural training, and hence could further increase the relevance of cross-cultural training. Many of the new research findings in this chapter are gained from studies of expatriates based in China. This country has an extraordinary economic development record that has attracted the attention of the Western world. On the other hand, China may be experienced as a very challenging host location. From a Western perspective, China is frequently regarded as the most foreign of all foreign places. Chinese culture, institutions, and people may appear completely baffling (Chen, 2001). In addition, the development and practices of Chinese management have been heavily influenced by the ancient cultural traditions of the country (Fang, 1999; Lowe, 2003; Wang, 2000) and there could be a risk of severe culture shock among Western expatriates (Kaye & Taylor, 1997). Hence, it may be a good idea to draw on experiences of Western expatriates in China since there seems to be a substantial need for effective cross-cultural skills for westerners who live and work there. This way, cultural and social differences and ensuing problems become more visible and easier to detect. Hence, China, to a certain extent, can be seen as a critical test case with possible implications for cross-cultural training in general when assigning expatriates to the rest of the world, and in particular for cross-cultural training of expatriates in other culturally challenging host locations.

The chapter proceeds with a discussion of whether cross-cultural training works or not, and its content. Succeeding that, based on a number of recent empirical investigations, new dimensions of cross-cultural training are discussed. The chapter ends with five major conclusions regarding cross-cultural training for expatriates and inpatriates alike.

Does Cross-Cultural Training Work?

Initially, it may be relevant to consider the fundamental question whether cross-cultural training is a worthwhile activity to undertake for organizations assigning expatriates abroad. The answer depends to a certain degree what cross-cultural training is and what criteria should be used to determine its effectiveness. It has been suggested that cross-cultural training is more efficient in creating knowledge and trainee satisfaction than changing behavior and attitudes and in improving adjustment and performance (Mendenhall et al., 2004). Furthermore, mostly due to methodological shortcomings and involving respondents other than expatriates (Kealey & Protheroe, 1996), it is not clear whether cross-cultural training can equip expatriates with what they need in the host culture, despite the numerous studies that have addressed the issue (Black & Mendenhall, 1990; Deshpande & Viswesvaran, 1992; Tung, 1981). For example, many studies do not even meet the minimal requirements of comparing experimental groups with control groups and neither do they specify pre- and post-training measures of changes in knowledge and skills (Kealey & Protheroe, 1996). However, more recent research involving business expatriates found supporting evidence for the beneficial effects of cross-cultural training. Findings of a mail survey to expatriates in China, involving most major Western European countries, indicated that expatriate managers who had received training adjusted more quickly in their assignments and were more satisfied with these assignments than those who had not received any training (Selmer, 2002d). The positive effect of cross-cultural training on the adjustment of expatriates has subsequently been corroborated by other researchers (Waxin, 2004; Waxin & Panaccio, 2005).

Content of Cross-Cultural Training

A pertinent distinction within the field of cross-cultural training is between culture-general and culture-specific training. This is a debated difference and there are proponents both for sensitivity training generally sensitizing expatriates to cross-cultural differences and their consequences (Brislin, Cushner, K., Cherrie, C. & Young, 1986; Brislin & Pedersen, 1976; Kraemer, 1973) as well as conveying more particular information targeting a specific national culture, and actually providing culturally-specific knowledge (Albert, 1983; Fiedler, Mitchell, & Triandis, 1971; Leong & Kim, 1991). Although a culture-specific approach has come to dominate cross-cultural training (see Bhawuk & Brislin, 2000, for an historical review of cross-cultural training), recent empirical evidence in support of the effectiveness of such an approach has been provided by Selmer (2002c). Investigating Western expatriates in Hong Kong, he found that previous experience in other locations in Asia did not facilitate their adjustment to Hong Kong, and neither did previous assignments outside Asia. The only thing that helped adjustment to Hong Kong was experience from that very location, suggesting that culturally unrelated

prior international experience may be irrelevant, while the strongest impact may be gained from location-specific experience. These findings have subsequently largely been supported by other researchers (Takeuchi, Tesluk, Yun, & Lepak, 2005). This could be a crucial insight since location-specific experience may be regarded as the most perfect cross-cultural training possible. What can be better than experiencing the real thing? That observation amounts to a significant argument in favour of culture-specific cross-cultural training. The obvious practical implications of these findings are that expatriates should not only go through cross-cultural training once in their career, but for each and every new foreign assignment they embark on. If past lessons learned have limited transferability, repeated cross-cultural training to acquire social skills appropriate to a culturally unfamiliar host environment may be worthwhile (Selmer, 2002c).

Although the evidence in favor of a culture-specific cross-cultural training approach may be clear, recent research on expatriates has uncovered a number of particular circumstances and new dimensions associated with international assignments. These new dimensions could be considered in the design of culture-specific cross-cultural training programs in the future.

New Dimensions of Cross-Cultural Training

This section of the chapter is organized according to a systems view of expatriates and various aspects that may affect their cross-cultural training. Initially, individual dimensions that have to do with the expatriates themselves are discussed. Following that, organizational factors are examined. The succeeding subsection deals with situational circumstances and the section ends with country-level aspects.

Individual Dimensions

Psychological Barriers to Adjustment

There is a wealth of evidence suggesting that many Western expatriates could find their assignment to China frustrating (Björkman & Schaap, 1994; Kaye & Taylor, 1997; Sergeant & Frenkel, 1998). However, the origin of some of these difficulties could rest with the expatriates themselves. They may have psychological barriers to adjust to life and work in China. Expatriates may feel inept at dealing with the Chinese reality or they could simply ignore it due to lack of interest. Expatriates with such psychological barriers may not adjust well to China, or any other foreign location, since they cannot achieve a real understanding of the conditions in the host country. In a study of Western expatriates in China, results showed that both perceived inability to adjust and unwillingness to adjust among newcomers seemed to affect at least some aspects of adjustment. However, these effects did not appear to be stable over time as there were no such effects in the case of long-stayers in China, suggesting that in the long run both inability and unwillingness to adjust may be of little importance (Selmer, 2004).

Cross-Cultural Training Implications

Although psychological barriers to adjustment may become less significant over time, much damage may occur during the settling-in period in the foreign assignment. It may therefore be worthwhile to administer cross-cultural training to try to modify expatriates' inability and unwillingness to adjust to a foreign location. To deal with perceived inability of the expatriates to adjust, and to enhance their confidence, a focus on salient cross-cultural differences to overcome in the host location may be helpful. Regarding unwillingness to adjust, cross-cultural training could instead focus on creating motivation for the individuals to modify their attitudes and behavior.

Coping Strategies for Successful Adjustment

Not only in China, but expatriation in general could be a stressful experience for the individual, and expatriates' means and ways of coping with that stress could affect how well they adjust to living and working abroad. The notion of coping refers to an individual's cognitive and behavioural efforts to manage specific external and/or internal demands that are appraised as taxing or exceeding the person's resources (Lazarus & Folkman, 1984). The literature typically makes a distinction between problem-focused and symptom-focused coping strategies (Folkman, Lazarus, Dunkel-Schetter, DeLongis, & Gruen, 1986; Folkman & Lazarus, 1980; Lazarus & Folkman, 1984; Pearlin & Schooler, 1978). While symptom-focused coping strategies intend to regulate stressful emotions, problem-focused coping strategies are applied to change the problematic person-environment relation that is perceived as the cause of the stress felt. In other words, using symptom-focused coping strategies, individuals attempt to minimize anxieties through physical or mental withdrawal from the situation or by avoiding the problem. In applying problem-focused coping strategies, a person tries to face the problem in order to change the situation (Folkman et al., 1986). In a series of studies of coping strategies and adjustment of Western expatriates in China, both male and female, empirical findings indicate support for the proposition that problem-focused coping strategies could enhance expatriate adjustment, whereas symptom-focused coping may be detrimental to such adjustment (Selmer, 1999a, 1999b, 2001b, 2002b; Selmer & Leung, 2007). For example, Selmer (2001b), investigating Western expatriates in Hong Kong, found a clear positive association between problem-focused coping and all of the studied measures of adjustment, as well as a negative relationship between symptom-focused coping and the investigated dimensions of adjustment.

Cross-Cultural Training Implications

Obviously, expatriates could benefit from being informed that problem-focused coping strategies are more effective than symptom-focused ones and could be trained in ways of problem-focused coping as well as avoidance of symptom-focused coping. An example of the former type of strategy is to try to solve culture-related problems or misunderstandings with host country nationals, and an example of the latter is

home country escapism, reminding oneself that some day one will be living back in one's home country, as a way to feel better about the current assignment.

Matching Personal Expatriate Characteristics with a Host Culture

Despite the importance to the assigning organization that the expatriate achieves a satisfactory work performance on the foreign assignment, not many studies have tried to directly assess expatriates' performance at work, let alone linking work performance to personal characteristics of the expatriates. Instead, much of the expatriate literature has focused on the adjustment of expatriates examining personal characteristics that may facilitate or mitigate international adjustment in general, regardless of destination (Caligiuri, 2000; Mamman & Richards, 1996; Takeuchi et al., 2005). However, in contrast to such studies which explore personal characteristics of expatriates that in general may affect their work outcomes, Selmer, Luring, and Feng (2009) attempted to match a certain personal characteristic of expatriates with a specific host culture. As opposed to the predominant belief in the West, in Chinese-dominated societies there may be a positive relationship between age and perceived possession of high-quality personal resources. That attitude towards old age may carry over to expatriates in Chinese societies. The self-efficacy of such individuals may be enhanced by being treated in a serious and respectful manner, and this supportive environment surrounding the expatriate manager may contribute to an improved job performance. Investigating Western expatriates in Greater China, Hong Kong, mainland China, Singapore and Taiwan, results showed that the job performance of the expatriates had a positive association with their age.

Cross-Cultural Training Implications

For expatriates destined for a Chinese cultural context who are unaware of the potential positive reactions of host country nationals to their mature age, learning and practicing how to exploit and take advantage of such behavior of the locals may be beneficial. This may also be in the best interest of the assigning firm since business expatriates are sent to foreign locations to perform certain work tasks. To make the expatriates aware of how they can perform better on the job in a Chinese cultural setting by making use of their older age could be a priority by the assigning organization.

Language Proficiency and Adjustment

Communication is crucial to management. But communication depends on a common language, a condition seldom existing in many international organizations. This could be the origin of many problems (Feely & Harzing, 2003). While language communicates, it also "ex-communicates"; that is, it only includes those who share the same tongue; everyone else is excluded (Fantini, 1995). This is especially so when mutually incomprehensible languages meet to create a formidable language barrier, such as the one encountered by many Western expatriates in China.

Although the standard of English proficiency is rising in China, using English in conversations with Chinese host nationals may be very difficult due to a lack of much common vocabulary. But even between relatively fluent speakers, the interaction could be very deceptive as it may obscure cultural differences. Although a business conversation may be conducted in a second language, English, participants certainly think in their own language according to their own cultural norms, which may not be fully comprehended. Instead of being an efficient vehicle of communication, the “common” language of English becomes an obstacle for true understanding (Liu, 1995; Scheu-Lottgen & Hernandez-Campoy, 1998). For example, Chinese speaking practices often lead others to (mis)perceive Chinese people as shy, indirect and reserved, or as evasive and deceptive. Such perceptions unavoidably create communication problems between Chinese and others (Gao, 1998), even if both sides use English. Therefore, proficiency in the Chinese language, including speaking practices, may promote the adjustment of foreign business expatriates in China, not only by improving their direct communication with host nationals in Chinese, but also by making their interactions in English more effective. Although this seems to be a question that is almost too obvious to pose, that is, does language ability enhance the ability of expatriates to adjust to the work and social environment, the answer regarding China is not really known through previous research. Selmer (2006b) investigated Western expatriates assigned to China and, controlling for the time expatriates had spent in China, he found that their language ability had a positive association with all the studied measures of their adjustment.

Cross-Cultural Training Implications

Expatriates departing for another country where English is not the norm must realize that learning the basics of that country’s language should be viewed as part of the assignment (Dolainski, 1997). The importance of language training for Western expatriates is apparent in a location like China (Björkman & Schaap, 1994). Managers would probably be in a better position if they could make themselves understood in *Putonghua*, the spoken national language of the Chinese mainland, or in the local dialect at their place of assignment (Selmer & Shiu, 1999). It is not necessary to master the foreign language to perfection, as demonstrating even very basic skills (survival language), as well as elementary speaking practices, may connote the message to the locals that the expatriate really cares to make an effort to understand the host culture (Brislin, 1994; Zimmermann, Holman, & Sparrow, 2003). Unfortunately, language training, which should be a part of cross-cultural training, is identified in the literature both as being essential for successful adjustment as well as being badly neglected by international business firms (Aryee, 1997; Black & Mendenhall, 1990; Brewster, 1995). The empirical results underscore the emerging literature on language training as part of expatriate preparations, as well as other human resource management responses by international organizations. Although it is not possible to claim, for example, that all Western expatriates should have 6 months of Chinese language learning and follow-up study in China, the potential value of language training of expatriates in very “foreign” locations

cannot be doubted. However, a myriad of other considerations will likely determine the specific details of such training. The cost-effectiveness of expatriate language training is just one of the many criteria international organizations may want to apply (Hayet, 2000). However, the difficulty of achieving high levels of proficiency, especially in non-European languages should not be underestimated (Bloch, 1995). Organizations may take the position that training high-level employees in a foreign language, such as Chinese, does not make much sense since it is a large investment with high front-end costs, not to mention the required sacrifice in time and effort by the individual. Top officials and executives may harm their careers by taking time off to study a language. Besides, it could be difficult to fit language training into the career ladder (Weber, 2004). So, although the empirical findings support language training in general, the necessity of expensive, tiring and time-consuming Chinese language training for expatriates is a decision for the specific organization to make.

Organizational Dimensions

Assignment to Tough Organizational Contexts

The literature on how the effectiveness of cross-cultural training may be influenced by various circumstances at the location of the foreign assignment is very scant. The distinction between different organizational contexts in assessing the effect of cross-cultural training is a novel approach. In a pioneering study, incorporating the impact of organizational abode on the effectiveness of cross-cultural training of business expatriates, Selmer (2005a) examined the differential effects of cross-cultural training on the adjustment of Western expatriates in international joint ventures and other business organizations in China. As elsewhere, international joint ventures in China are usually managed jointly by the local and foreign parent companies, both seeking “due representation” in the top management group (Björkman & Lu, 2001; Hambrick, Li, Xin, & Tsui, 2001). Besides involving the usual problems of partners having their own expectations, objectives and strategies, top executives in international joint ventures in China usually differ widely in national origins, cultural values and social norms (Li, Xin, & Pillutla, 2002). Hence, the challenges facing Western expatriates in international joint ventures in China could be extraordinary. This could make an expatriate assignment to an international joint venture in China a very frustrating experience. Presumably, cross-cultural training may be particularly helpful for the adjustment of Westerners encountering the frustrating work environment in an international joint venture in China. In comparison, the adjustment of Western expatriate executives in other types of organizations may not be facilitated as much by cross-cultural training. In organizational settings totally dominated by the foreign parent as, for example, in a wholly-owned subsidiary, Western expatriates may encounter a less frustrating internal work environment. As presumed, results showed that cross-cultural training had a positive association with work adjustment for expatriates in joint ventures, but there was no relationship with

work adjustment for expatriates in other types of organizations in China (Selmer, 2005a).

Cross-Cultural Training Implications

The findings appear to imply that the potential beneficial effects of cross-cultural training on international joint venture expatriates' work adjustment in China may be enhanced through re-targeting and re-focusing such training. A good idea could be to emphasize the work context in China when training expatriate candidates destined for joint venture operations there. That could be worthwhile also because cross-cultural training aimed at facilitating work adjustment is not very commonly provided to expatriates (Brewster & Pickard, 1994; Early, 1987; Tung, 1982).

Training of Host Nationals

It is known that some multinational corporations use cultural control in their foreign subsidiaries (Edström & Galbraith, 1977). However few academic studies have delved into the phenomenon of *organizational acculturation*, whereby host country nationals employed in foreign operations become acculturated to the parent organizational culture (Selmer & de Leon, 1996). Since the parent organizational culture typically reflects the parent national culture (Hofstede, 1999), employees in foreign subsidiaries may experience acculturation to a foreign culture within their native country. A number of studies have argued that organizational culture is a mechanism for controlling foreign subsidiaries (Edström & Galbraith, 1977; Jaeger, 1983; Pucik & Katz, 1986). Directly monitoring, reporting and evaluating employee performance is more costly than encouraging employees to share the espoused organizational values in order to guide their behavior (Black, Gregersen, & Mendenhall, 1992). A well-socialized local executive can be expected to act in accordance with the internalized culture (Nicholson, Stepina, & Hochwater, 1990). Some multinational corporations rely on cultural control to the extent that the national character of the parent organization is exported to its subsidiaries (Kale & Barnes, 1992). In a series of studies of local middle managers employed by foreign subsidiaries in Asia, Selmer & de Leon (1993, 1996, 2002) found empirical evidence for the effects of organizational acculturation. The work values of the local middle managers had changed and become more similar to those of the top expatriate executives and those predominant in the parent country. One possible implication of these findings is that local executives, who are acculturated to the parent cultural values, could oversee operations in much the same manner as an expatriate would have done.

Cross-Cultural Training Implications

It is not known to what extent cultural control is an explicit policy of multi-national corporations, providing a clear mandate for expatriates to influence the work values of local employees, or if organizational acculturation is mainly due to subordinates'

quests for a good working relationship with their foreign bosses (Selmer, 2001a), and the locals incidentally learn new work values from imitation or modelling (Bandura, 1971). Nevertheless, cross-cultural training may be used to make cultural control more effective. A useful technique is values gap analysis, proposed and examined by Selmer in a series of ground-breaking studies (1995, 1996a, 1996b), in which one group estimates the values profile of the other, which is then compared with the actual profile. Based on the findings of such comparisons, local managers could be trained, very much like expatriates (Selmer, 2000), to be aware of the differences and similarities in cultural values, assumptions, communication styles, and attributions between the expatriate top executive's culture and the local culture to more quickly achieve cultural control effects. Besides, this may also facilitate the adjustment of the expatriate managers, at least in the workplace (Toh & DeNisi, 2007; Vance & Paik, 2005; Vance & Ring, 1994).

Situational Dimensions

Training for Going Home

In a number of studies involving ethnic Chinese expatriating to Chinese-dominated cultures, results suggest that such moves may be fraught with adjustment problems (Selmer, 2002a; Selmer, Ebrahimi, & Li, 2000; Selmer & Ling, 1999; Selmer & Shiu, 1999). For example, studying the adjustment of ethnic Chinese expatriates from Hong Kong assigned to mainland China, it can be concluded that life and work in the mainland is different in many ways from that in Hong Kong. Paradoxically, the common Chinese cultural heritage seems to aggravate the adjustment problems of the Hong Kong expatriates in mainland China instead of facilitating acclimatization. It is remarkable how closely the predicament of many of the expatriates from Hong Kong resembled the worst experiences of expatriate managers in general, as reported in the literature (Black, 1988; Black & Porter, 1991; Lawson & Swain, 1985; Schermerhorn & Bond, 1992; Stening & Hammer, 1992). At work, they generally refrained from adapting their managerial style to local expectations. Instead, they insisted, often in vain, that the subordinates adopt Hong Kong work standards and behaviors, resulting in frustration and in feelings of detachment on the part of the expatriates. Since they often expatriated to mainland China without their families, they could draw little or no support from them. Outside work, they avoided socializing with host nationals, since they usually did not speak the local Chinese dialect. Instead, they lived in the vicinity of and socially interacted with other Hong Kong expatriates with whom they could speak in Cantonese, the local Chinese dialect in Hong Kong. Furthermore, their leisure time was mainly spent in the seclusion of their homes. These findings render further support for the suggestion discussed above, that it could be as difficult for expatriates to adjust to a similar as to a dissimilar host culture.

Cross-Cultural Training Implications

Associated with the literature on repatriation, and especially training for returning expatriates to their original cultural contexts (Andreason & Kinneer, 2005; Lazarova & Caligiuri, 2007; Osman-Gani & Hyder, 2008), even expatriates assigned to other geographical locations, although situated within the same cultural and ethnic sphere, may require cross-cultural training. As proposed above, such training may try to attract expatriates' attention to the most essential nuances of cultural differences and their behavioral implications in the host culture, as well as attempting to motivate individuals to fine-tune their current thinking and behavior accordingly (Selmer, 2007).

Size of the Host Location and Adjustment

Yet another example of how the effectiveness of cross-cultural training may be influenced by various circumstances at the location of the foreign assignment is to consider the size of the host location in the foreign country. Although many Western expatriates could find their assignment in China frustrating, the magnitude of their frustration and their attained extent of adjustment to life and work could be contingent on the size of their specific host location. Maybe Westerners more easily adjust to large cities with their more Western-style way of life and consumption patterns than in less Westernized small towns and villages. The relevant question to ask is whether Western business expatriates assigned to bigger-sized locations are better adjusted than their counterparts at smaller-sized locations. Investigating Western expatriates assigned to locations of varying size in China, Selmer (2005b) found, as expected, that the size of the location was positively associated with adjustment of the expatriates.

Cross-Cultural Training Implications

Expatriates destined for locations of a smaller size in China could be offered special training in how to cope in that tougher context. Presumably, that may include Chinese language training since the proficiency in English may be higher in larger cities than in small towns (Li, 2002).

Country-Level Dimensions

Adjusting to a Similar Vs. a Dissimilar Culture

Although seldom formally tested, the traditional assumption in the literature on expatriate management is that the greater the cultural novelty of the host country, the more difficult it would be for the expatriate to adjust (Black et al., 1991). In two studies, involving different samples and methodology, this proposition was tested (Selmer, 2006a, 2007). The first study included Western expatriates in China,

and although a negative relationship was hypothesized between cultural novelty and adjustment among the respondents, the results showed that there was no significant association between them (Selmer, 2006a). The second study compared the extent of adjustment of American expatriates in Canada and Germany and found that although the Americans perceived Canada as more culturally similar to America than Germany, no significant inter-group differences were detected for any of the measures of adjustment applied (Selmer, 2007). The findings of these two studies support the intuitively paradoxical proposition that it could be as difficult for expatriates to adjust to a similar as to a dissimilar host culture (Carr, Chapter 7 this volume). The suggestion that the degree of cultural similarity/dissimilarity may be irrelevant to how easily expatriates adjust is fundamental and may invoke radical implications, not least for the practice of applying cross-cultural training, which has traditionally been thought to be more necessary the more culturally dissimilar the foreign destination.

Cross-Cultural Training Implications

Considering these findings, cross-cultural training could be useful, not only when assigning expatriates to foreign locations with a very dissimilar culture, but also for assignments to culturally similar host countries. In other words, no matter where expatriates are assigned, they may all benefit from cross-cultural training. However, it may well be that the training should vary with the degree of cultural similarity of the host location (Carr, Chapter 7 this volume). Preparing expatriates destined for very dissimilar cultures may include substantial elements of cognitive training, emphasizing factual information about the host country (Gudykunst, Guzley, & Hammer, 1996). But for expatriates going to countries with a similar culture, it would probably be more important to focus on creating motivation for the individuals to fine-tune their current thinking and behavior. Directing these minute changes, the cross-cultural training may focus on attracting the attention to the most essential nuances of cultural differences and their behavioral implications in the similar host culture (Selmer, 2007; see also, Carr, Chapter 7 this volume).

Conclusions

This chapter used China as a critical test case as an expatriate destination with possible implications for cross-cultural training in general, and in particular for the training of expatriates for other culturally challenging host locations. From the empirical observations and research results of the new dimensions of cross-cultural training discussed above, five major conclusions can be drawn: cross-cultural training works, culture-specific cross-cultural training may be preferable, cross-cultural training could be custom-made, recurring cross-cultural training may be necessary, and everybody may need cross-cultural training.

Cross-Cultural Training Works

Despite some earlier doubts regarding the usefulness of cross-cultural training (Kealey & Protheroe, 1996), recent empirical research on cross-cultural training of expatriates is more unanimous about its benefits (Selmer, 2002d; Waxin, 2004; Waxin & Panaccio, 2005). It may really work if it is carefully implemented, but that also constitutes the problem in a practical situation. The reason that many organizations do not, or only to an insufficient extent, administer cross-cultural training to their expatriates (Brewster, 1995; Hutchings, 2005; Selmer, 2000) may be of a practical nature. There is simply no time for a thorough implementation of cross-cultural training. So, although organizations could be aware of the value of cross-cultural training, they may feel that organizational priorities do not permit cross-cultural training.

Culture-Specific Cross-Cultural Training

Although culture-specific training has become the dominating mode of cross-cultural training, recent empirical evidence has emphasized that past experience from previous foreign assignments may be of limited relevance for being successful in a new posting, especially in another cultural context (Selmer, 2002c; Takeuchi, et al., 2005). If lessons learned in one foreign assignment do not facilitate adjustment in another, cross-cultural training may preferably be culture-specific, and the more specific, the better. Furthermore, that also implies that expatriates could benefit from cross-cultural training for every new foreign assignment they undertake.

Custom-Made Cross Cultural Training

A number of empirical research results discussed above seem to suggest that it could be worthwhile to custom-make cross-cultural training. For example, cross-cultural training intended to facilitate adjusting to a similar culture may require a different type of content than training for a dissimilar culture. Matching personal characteristics with host countries may also require special training for the expatriates teaching them how to exploit this advantage. As has been noted in the repatriation literature, specific training may be required for going home (Andreason & Kinneer, 2005; Lazarova & Caligiuri, 2001; Osman-Gani & Hyder, 2008). However, this may also be the case when someone is expatriated to an identical or very similar ethnical context, but where other societal parameters are quite different. Assignments to tough organizational contexts as well as small-sized host locations may both require custom-made cross-cultural training to facilitate expatriates to deal with these more difficult destinations. Last, but not least, the benefits of some elementary language ability may facilitate the adjustment of expatriates as it could give the impression that they make an effort to understand the local culture

(Brislin, 1994; Zimmermann et al., 2003). Besides offering custom-made cross-cultural training to expatriates, specially designed training may also be offered to host national employees at foreign subsidiaries to enhance a desired effect of cultural control.

Recurring Cross-Cultural Training

All these special circumstances at host locations discussed above may also warrant fresh provision of training associated with each and every new assignment, provided it is not a repeated assignment to the same location. However, even in such cases, enough time may have lapsed to justify a refresher course to update expatriates on major developments. In other words, expatriates may still benefit from cross-cultural training, regardless of how many times they have previously been on foreign assignments. This is a radically different proposition compared to the current practice of many international organizations who assign their expatriates to all parts of the world without much cross-cultural training at all (Brewster, 1995; Hutchings, 2005; Selmer, 2000).

Everybody Needs Cross-Cultural Training

The ultimate conclusion of this chapter is that everybody needs cross-cultural training. Training is not only for novices on their first assignment, it could also be beneficial for expatriate veterans with a long and varied career of international assignments. And cross-cultural training is not only for expatriates, since there may be good reasons to also train host country employees. Training of host nationals and expatriates alike is in line with the contention that cross-cultural training will not work unless all sides are equally well-prepared and hence can be treated with cultural respect (Bennett & Bennett, 2004).

Obviously, there could be a multitude of reasons why organizations appear reluctant to embrace the idea of cross-cultural training. This chapter has presented a number of novel justifications for not only introducing cross-cultural training in international organizations, where this concept is little known or applied, but also that it may be worthwhile to expand the scope of cross-cultural training to become a routine preparation associated with every international employee and each instance of mobility. In that way, cultural competence becomes a criterion for all organizations, commercial and non-profit alike, operating on a global scale. Considering the present state of the world economy, when international organizations may cut back on cross-cultural training in their struggle for current survival, they may instead make a fatal mistake for the future. Hopefully, the ideas discussed in this chapter may help avert such unfortunate events.

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Chapter 10

Mobility and Acculturation

John W. Berry

Abstract The worldwide mobility of groups and individuals has produced a situation in which contact among cultures has become a daily experience for most people, and a focus of research and practice for social scientists. The processes of international “migration” and culture contact have created societies that are culturally plural, and have set in play a process termed acculturation. This process generates cultural and psychological changes among groups and individuals living in such diverse cultural settings. Eventually, some form of mutual adaptation takes place by which peoples come to some *modus vivendi* to live together in these culturally complex societies. The psychology of contact and acculturation has recently become a major focus in cross-cultural psychology. This chapter employs frameworks that identify the various kinds of groups that have come together to form plural societies, and that outline the main features of acculturation at both the cultural and individual levels. A further framework is described that outlines how individuals and groups seek to engage each other in these contact situations, using the concept of intercultural strategies. It then reviews some empirical studies of “migration” and acculturation. It concludes that group and individual differences need to be taken into account in order to achieve a form of mutual accommodation. This shared process is essential if peoples’ lives are to be enhanced (rather than destroyed) by this process of intercultural engagement and the resultant acculturation.

Keywords Acculturation · Intercultural strategies · Migration · Mutual accommodation · Plural societies

The worldwide mobility of groups and individuals has produced a situation in which contact among cultures has become a daily experience for most people, and a focus of research and practice for social scientists (Furnham, this volume). Of course, this situation has a history many millennia long; however, it is only relatively recently

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that research has examined it in any detail, usually with the goal of understanding and managing it (Carr, Chapter 1 this volume). The processes of international “migration” and culture contact have created societies that are culturally plural, and have set in play a further process termed “acculturation”. This process generates cultural and psychological changes among groups and individuals living in such diverse cultural settings. Eventually, some form of mutual adaptation takes place by which peoples come to some *modus vivendi* to live together in these culturally complex societies. The psychology of contact and acculturation has recently become a major focus in cross-cultural psychology. This chapter employs a framework that asserts that group and individual differences need to be taken into account if peoples’ lives are to be enhanced (rather than destroyed) by this process.

The sequence of events examined in this chapter is: (1) Mobility-(2) mutual culture contact-(3) mutual acculturation-(4) mutual adaptation. The series of linkages start with peoples moving from one cultural setting to another, continues with various ways of engaging in contact between the cultures, and with various strategies to deal with the resultant cultural and psychological changes, and ends with some relatively stable ways of adapting to this situation.

Mobility and Contact

Groups of people and their individual members find themselves in culture-contact situations for a variety of reasons, but all have resulted from some sort of mobility. Some people actually migrate themselves; some are the result of earlier generations of new settlements; and some have stayed where they are but have come to be dominated by the new settlement of others. Some migrate and are in contact voluntarily, while others are involuntarily in such situations. All of these result in the establishment of culturally-plural societies, where peoples of differing cultural backgrounds rub shoulders with each other on a daily basis. The contact situations that result in plural societies differ from each other because of these variations in reasons for new settlement. These differences have psychological import, because they involve different motives, attitudes, coping and stress (Carr, Chapter 1 this volume; Hernández-Plaza et al., this volume).

One way to understand these variations is presented in Fig. 10.1, arranged along three dimensions. The *mobility* dimension contrasts those peoples who move to another society with those who stay where they are; the *voluntariness* dimension contrasts those peoples who want to be in contact with those who do not; and the *permanence* dimension contrasts those who are likely to remain in contact with those who may move away from contact. The types of contact situations generated by crossing these three dimensions reveal a number of well-known kinds of groups. “*Immigrants*” are those who (usually) move voluntarily to another society and who are there relatively permanently. In contrast, while *sojourners* have the same mobility and voluntary qualities as “immigrants,” they are only temporarily away from home (such as international students, diplomats and guest workers). *Ethno-cultural*

MOBILITY	VOLUNTARINESS OF CONTACT	
	VOLUNTARY	INVOLUNTARY
SEDENTARY	ETHNOCULTURAL GROUPS	INDIGENOUS PEOPLES
MIGRANT permanent temporary	IMMIGRANTS SOJOURNERS	REFUGEES ASYLUM SEEKERS

Fig. 10.1 Mobility and contact: Variations in kinds of groups in culturally plural societies

groups are the descendents of earlier new settlements who have maintained a sense of their cultural origins and who form communities in their Diasporas. They can derive from voluntary new settlers (such as French-Canadians, Greek-Australians, and Chinese-Americans). They can also be derived from involuntary new settlers (such as African communities of former slaves in the Caribbean), but who now are generally in contact with others on a voluntary basis. *Indigenous peoples* are those who are already “on” their home territories, but are engaged in intercultural contact with those who have “migrated” there. These contacts are involuntary because they did not invite colonization; nor did they seek their incorporation into larger nation states with a subsequent presence in their lives by new settlers with potentially more political and economic power than themselves. In some societies (e.g., China, India), these groups are referred to as *national minorities*. Finally, non-voluntary “migrants” are made up of *refugees* (who have been forced to migrate, but who have obtained the right to permanent settlement in a new society) and *asylum seekers* (who await a decision, often in camps, about their possible repatriation). In this chapter, those groups that have migrated (“immigrants”, sojourners and refugees) are the main focus.

Such distinctions draw our attention to some psychological qualities that differentiate among these types of groups. Most important are the motivations to be in (or to avoid) intercultural contact. Among non-dominant peoples, the attitudes toward contact will vary according to the degree of voluntariness: those who have been imposed upon, or those who have been uprooted, are likely to have a negative orientation toward contact and change. Those who are only temporarily in contact may also have minimal interest in engaging in serious intercultural contact and change. Among members of the socially dominant people in larger society, attitudes are also likely to vary. The reasons to colonize or enslave are likely to be rooted in negative attitudes towards those so treated. With respect to new settlers, there are larger variations in dominant groups’ attitudes: some view new settlers as an economic necessity to societal growth and as a source of cultural enrichment, while others see them as an economic and cultural threat to their society. Similarly, with respect to refugees, some view them as a threat, while others see them as an opportunity to put

into practice their humanitarian values. These psychological variations have strong links to both acculturation and to adaptation phenomena, to which we now turn.

Acculturation

Acculturation is the process of cultural and psychological change that takes place as a result of contact between cultural groups and their individual members (Redfield, Linton, & Herskovits, 1936). Such contact and change occurs during colonization, military invasion, new settlement and sojourning (such as tourism, international study and overseas posting); it continues after initial contact in culturally-plural societies, where ethno-cultural communities maintain features of their heritage cultures. Cultural changes take place in *both* groups in contact. Adaptation to living in culture-contact settings takes place over time; occasionally it is stressful, but often it results in some form of mutual accommodation between the groups and individuals. Although much research has examined the cultural and individual levels of acculturation phenomena (Berry, 2003), many societies of settlement now emphasize “family reunification” as a positive way to receive newcomers. In this kind of program, whole families, rather than individuals, migrate. So, in addition to working at the cultural and individual levels of acculturation, it is imperative that research should focus also on the social unit that is the family (Frieze & Li, this volume).

The initial research interest in acculturation grew out of a concern for the effects of European domination of colonial and Indigenous peoples. Later, it focused on how new settlers (both voluntary and involuntary) changed following their entry and settlement into receiving societies. More recently, much of the work has been involved with how ethno-cultural groups and individuals relate to each other and change, as a result of their attempts to live together in culturally plural societies. Nowadays, all three foci are important, as globalization results in ever-larger trading and political relations: Indigenous national populations experience neo-colonization, fresh waves of new settlers, sojourners, and refugees flow from these economic and political changes (Ager & Ager, this volume), and large ethno-cultural populations become established in most countries (see also, Maynard et al., this volume).

Graves (1967) introduced the concept of *psychological acculturation*, which refers to changes in an individual who is a participant in a culture-contact situation, being influenced both directly by the external (usually dominant) culture, and by the changing culture (usually non-dominant) of which the individual is a member. There are two reasons for keeping the cultural and psychological levels distinct. The first is that in cross-cultural psychology, we view individual human behaviour as interacting with the cultural context within which it occurs; hence separate conceptions and measurements are required at the two levels (Berry, Poortinga, Segall, & Dasen, 2002). The second is that there are vast individual differences in psychological acculturation, even among individuals who live in the same acculturative arena

(Sam & Berry, 2006). Not every individual enters into, and participates in, or changes in the same way.

A framework that outlines and links cultural and psychological acculturation, and identifies the two (or more) groups in contact (Berry, 2003) provides a map of those phenomena which I believe need to be conceptualized and measured during acculturation research (see Fig. 10.2). At the cultural level (on the left) we need to understand key features of the two original cultural groups prior to their major contact. It is essential to understand this pre-contact variation among the groups that are now attempting to live together following new settlement. New settlers bring cultural and psychological qualities with them to the new society, and the new society also has a variety of such qualities. The compatibility (or incompatibility) in religion, values, attitudes, personality (etc.) between the two cultural communities in contact needs to be examined as a basis for understanding the acculturation process that is set in motion. It is also important to understand the nature of their contact relationships. It may be one of domination of one group over the other, or of mutual respect or hostility. Finally, at the cultural level, we need to understand the resulting cultural changes in *both* groups that emerge during the process of acculturation. No cultural group remains unchanged following culture contact; acculturation is a two-way interaction, resulting in actions and reactions to the contact situation (Selmer, this volume). In many cases, most change takes place in non-dominant communities; however, all societies of settlement (particularly their metropolitan cities) have experienced massive transformations following years of receiving new settlers. The gathering of this information requires extensive ethno-graphic, community-level work (Hernández-Plaza et al., this volume; Maynard et al., this volume). These changes can be minor or substantial, and range from being easily accomplished through to being a source of major cultural disruption.

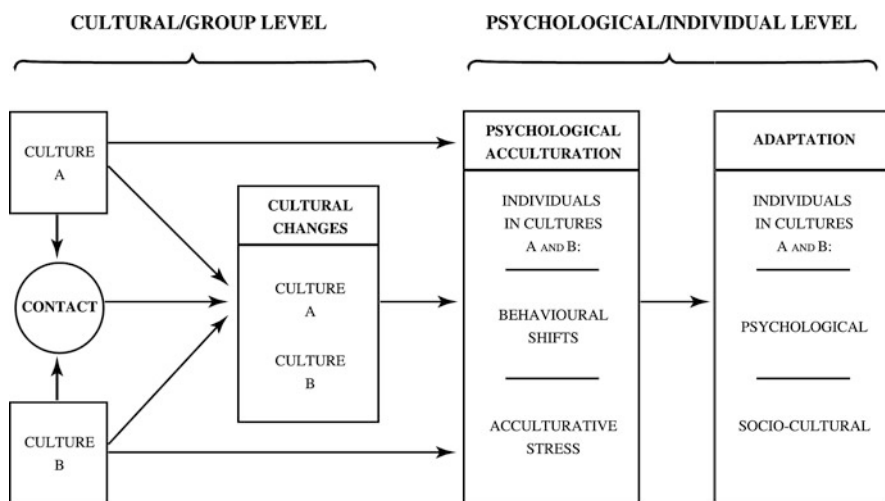


Fig. 10.2 A general framework for understanding acculturation at group and individual levels

At the individual level, we need to consider the psychological changes that individuals in all groups undergo, and their eventual adaptation to their new situations. Identifying these changes requires sampling a population and studying individuals who are variably involved in the process of acculturation. These changes can be a set of rather easily accomplished behavioural shifts (e.g., in ways of speaking, dressing, and eating) or they can be more problematic, producing acculturative stress (Berry, 1976; Berry, Kim, Minde, & Mok, 1987) as manifested by uncertainty, anxiety, and depression. Adaptations can be primarily internal or psychological (e.g., sense of well-being, or self-esteem), or socio-cultural (Ward, 1996), linking the individual to others in the new society as manifested, for example, in competence in the activities of daily inter-cultural living (Carr, Chapter 7 this volume).

Acculturation Strategies

The concept of *acculturation strategies* refers to the various ways that groups and individuals seek to acculturate. Knowledge of these variations has increased substantially in recent years (see Berry, 2003), challenging the assumption that everyone would assimilate and become absorbed into the dominant group (Gordon, 1964). As noted above (Fig. 10.1), the two groups in contact (whether dominant or non-dominant) usually have some notions about what they are attempting to do (such as colonial policies, or reasons for mobility). At the individual level, persons will vary within their cultural group (e.g., on the basis of their educational or occupational background), and within their families persons will vary according to their gender or position (e.g., mother, son). The more immediate outcomes of the acculturation process (including the behaviour changes and acculturative stress phenomena) are known to be a function, at least to some extent, of what people try to do during their acculturation (i.e., their acculturation strategies). The longer-term outcomes (both psychological and socio-cultural adaptations) often correspond to the strategic goals set by individuals and by the groups of which they are members (Berry, 1997).

Four acculturation strategies have been derived from two basic issues facing all acculturating peoples. These issues are based on the distinction between orientations towards one's own group, and those towards other groups (Berry, 1980). This distinction is rendered as (i) a relative preference for maintaining one's heritage culture and identity (Tharenou, this volume) and (ii) a relative preference for having contact with and participating in the larger society along with other ethno-cultural groups. An example of items for the first dimension is: "I find it important that the (my ethnic) culture be maintained from generation to generation". For the second dimension, an example is: "I believe that (my ethnic) parents should make an effort for their children to develop ties with the Canadian society outside of school". Internal consistency is generally high; alpha is 0.77 for the ethnic maintenance scale, and 0.86 for the national contact scale (Sabatier & Berry, 2008). It has now been well demonstrated that these two dimensions are empirically, as

well as conceptually, independent from each other (e.g., Ryder, Alden, & Paulhus, 2000; Sabatier & Berry, 2008). Usually, the independence of the two dimensions results from factor analyses of items, or by simple correlational analysis. When the two factors are distinct, or when the two scale scores are minimally correlated, this independence is validated.

This two dimensional formulation is presented in Fig. 10.3, for non-dominant ethno-cultural groups and individuals (on the left) and for dominant groups and individuals in the larger society (on the right).

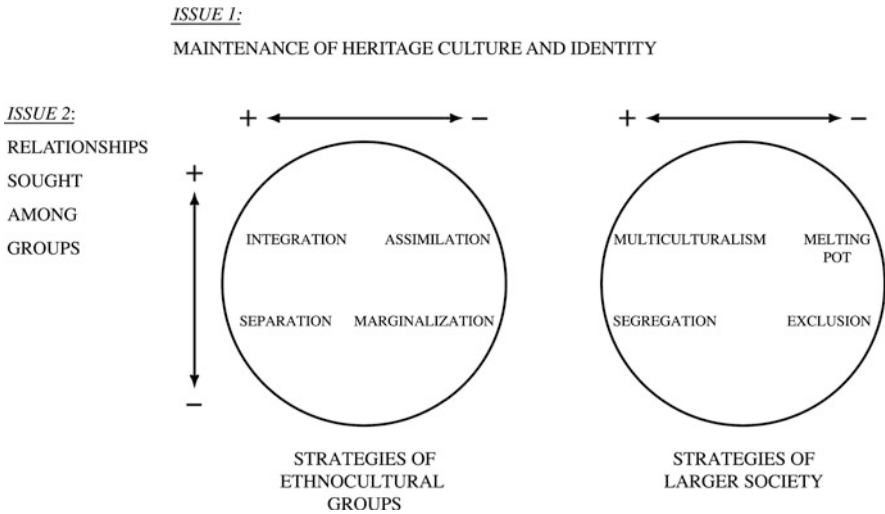


Fig. 10.3 Acculturation strategies in non-dominant ethno-cultural groups, and in the larger society

These two issues can be responded to on attitudinal dimensions, shown as varying along bipolar dimensions, rather than as bald (positive or negative) alternatives. For non-dominant ethno-cultural groups, orientations to these issues intersect to define four acculturation strategies. These strategies carry different names, depending on which group (the non-dominant or dominant) is being considered. From the point of view of non-dominant ethno-cultural groups (on the left of Fig. 10.3), when individuals do not wish to maintain their cultural identity and seek daily interaction with other cultures, the *Assimilation* strategy is defined. In contrast, when individuals place a value on holding on to their original culture, and at the same time wish to avoid interaction with others, then the *Separation* alternative is defined. When there is an interest in both maintaining one’s original culture, while in daily interactions with other groups, *Integration* is the strategy. In this case, there is some degree of cultural *integrity* maintained, while at the same time seeking, as a member of an ethno-cultural group, to participate as an *integral* part of the larger social network. Finally, when there is little possibility or interest in cultural maintenance (often for reasons of enforced cultural loss), and little interest in having relations with others (often for reasons of exclusion or discrimination) then *Marginalization*

is defined. Note that *integration* has a very specific meaning within this framework: it is clearly different from assimilation (because there is substantial cultural maintenance with integration), and it is not a generic term referring to any kind of long term presence, or involvement, of a new settler group in a society of settlement (Berry, 2007). The assessment of these acculturation attitudes of non-dominant peoples are a core feature in acculturation research (e.g., Berry, Kim, Power, Young, & Bujaki, 1989).

These two basic issues were initially approached from the point of view of the non-dominant ethno-cultural groups. However, the original anthropological definition clearly established that *both* groups in contact would change and become acculturated. Hence, a third dimension was added: that of the powerful role played by the dominant group in influencing the way in which mutual acculturation would take place (Berry, 1974, 1980). The addition of this third dimension produces the right side of Fig. 10.3. Assimilation, when sought by the dominant group, is termed the *Melting Pot*. When Separation is forced by the dominant group it is *Segregation*. Marginalization, when imposed by the dominant group, is *Exclusion*. Finally, Integration, when diversity is a widely-accepted feature of the society as a whole, including by all the various ethno-cultural groups, it is called *Multi-culturalism*.

Views held about these issues by the dominant society and its members have been examined (see Berry, Kalin, & Taylor, 1977; Berry & Kalin, 2000). The acculturation ideologies and policies of the dominant society, and the attitudes of their individual members, constitute an important element of acculturation research. As a counterpart to the acculturation attitudes of non-dominant peoples (on the left of Fig. 10.3), there are the constructs of *acculturation expectations* (Berry, 2003) and *multi-cultural ideology* (introduced by Berry et al., 1977) to assess the attitudes held by members of the larger society. The first concept is an exact parallel to the acculturation attitudes held by non-dominant individuals, but in this case, the items are phrased in terms of how dominant group members think non-dominant individuals *should* acculturate. The second concept attempts to encompass the general and fundamental view that cultural diversity is good for a society and its individual members (i.e., there is a high value placed on cultural maintenance), and that such diversity should be shared and accommodated in an equitable way (i.e., there is a high value placed on contact and participation among all groups). Examples of multi-cultural ideology scale items are: "A society that has a variety of ethnic and cultural groups is more able to tackle new problems as they occur"; "Immigrant parents should encourage their children to retain the culture and traditions of their homeland"; and "If people of different ethnic and cultural origins want to keep their own culture, they should keep it to themselves" (reversed). This combination of the acceptance of both diversity and equity constitutes the basis of integration and multi-culturalism. In addition, the notion of multi-cultural ideology incorporates the acceptance of the view that dominant society and its members should be prepared, themselves, to change in order to accommodate others in the larger society. In various studies, this ideology has been assessed by a measure that loaded integration

items positively; and melting pot, segregation, and exclusion items negatively. The internal consistency is generally reasonable (Cronbach's Coefficient Alpha = 0.75).

Our results generally support these measures' construct validity (internal consistency is generally high with alpha = 0.75; Berry et al., 1977; Berry & Kalin, 1995). Others have also found that integrationist views usually contrast with the other three attitudes (van de Vijver, Breugelmans, Schalk-Sokar, 2008). Multi-cultural ideology has close empirical links to ethnic attitudes and prejudice, but is more explicitly related to practices for managing intergroup relations in culturally diverse groups. The assertion that there is a close connection between the attitudes of the non-dominant and dominant communities has been reinforced through the work of Bourhis, Moise, Perreault, and Senecal (1997) in their presentation of an interactive acculturation model.

Integration can only be "freely" chosen and successfully pursued by non-dominant groups when the dominant society is open and inclusive in its orientation towards cultural diversity (when there is widespread acceptance of multi-cultural ideology). Thus a *mutual accommodation* is required for Integration to be attained, involving the acceptance by *both* groups of the right of all groups to live as culturally different peoples. This strategy requires non-dominant groups to adopt the basic values of the larger society, while at the same time the dominant group must be prepared to adapt national institutions (e.g., education, health, labor) to better meet the needs of all groups now living together in the plural society (Carr, Chapter 7, this volume; Maynard et al., this volume; Podsiadlowski & Ward, this volume).

With the use of this dual framework, comparisons can be made between individuals and their groups, and between non-dominant peoples and the larger society within which they are acculturating. Inconsistencies and conflicts between these various acculturation preferences are common sources of difficulty for those experiencing acculturation. For example, this can occur when individuals do not accept the main ideology of their society (when individuals oppose new settler cultural maintenance in a society where multi-culturalism is official policy), or when new settler children challenge the way of acculturating set out by their parents. Generally, when acculturation experiences cause problems for acculturating individuals, we observe the phenomenon of acculturative stress, with variations in levels of adaptation.

The presentation of these strategies for the non-dominant group has been based on the assumption that non-dominant groups and their individual members have the freedom to choose how they want to behave during their acculturation. This, of course, is not always the case; the preferences (attitudes) of individuals do not always become expressed in their actual behaviour. Thus, in addition to attitudes, researchers usually also assess behaviours in the same domains as their attitudes (for example, the preferences and actual behaviours for, food eaten, dress worn, religion, and family relationships). There is always a less than perfect relationship between acculturation attitudes and behaviours, just as in the case of any other areas of life. The combination of acculturation attitudes and behaviours has been termed *acculturation strategies*.

Research Examples

There are three questions that have guided much of the recent research on acculturation at both levels: groups and individuals. These questions have existed in various forms for many years, but have become formalized in a recent book (Berry et al., 2006) that renders them explicit. Although these questions have a long history, they have been clarified by recent research, and partly in response to critical comments and debate in the acculturation literature (e.g., Berry & Sam, 2003; Rudmin & Ahmadzadeh, 2001).

The three questions are the following:

- (i) *How do people acculturate?* Are there variations in the goals that societies, families and individuals seek to achieve; are there variations in the process that people experience or in the end result that people attain? As noted above (in the section on acculturation strategies), for many years this question seemed to be settled: the goal, the process and the end result of acculturation was thought to be the inevitable absorption of non-dominant groups and individuals into the dominant society, leading to a culturally homogeneous society. However, there is now some agreement that there are variations. Despite this, there is no consensus on how many there are, on how distinct they are one from another, and how best to assess them.
- (ii) *How well do people adapt?* For many years it was thought that people inevitably encounter problems, and that these experiences result in poor adaptation, mainly of a psychological nature. Much of this generalization came from reports prepared by those professionals, (mainly psychiatrists, social workers, counsellors, and other clinicians) who were working with new settlers who were in fact experiencing, and seeking help for, their problems.
- (iii) *What is the relationship between how they acculturate and how well they adapt?* If there are variations in how people acculturate, and variations in how well they adapt, this third question inevitably arises. If there are systematic relationships, the possibility exists for some “best practices” in how to acculturate in order to achieve better, rather than worse, adaptations.

To illustrate these concepts and questions, the following is an overview of a study of the acculturation and adaptation of “immigrant” youth (Berry, Phinney, Sam, & Vedder, 2006). Samples included “immigrant” youth (aged 13–18 years) settled in 13 societies ($N = 5,298$), a sample of their parents ($N = 2,350$), as well as samples of national youth ($N = 2,631$) and parents ($N = 967$). The study was guided by the three core questions identified above: how do they acculturate; how well do they adapt; and are there important relationships between how they acculturate and how well they adapt?

To address the first question of how “immigrant” youth live during their acculturation, a number of acculturation variables were measured in the study; these included both attitudes and behaviours. We assessed preferences for the four acculturation attitudes – Integration, Assimilation, Separation, and Marginalization; we

also examined two cultural identities (ethnic and national), language knowledge and use (ethnic and national), and peer relations (ethnic and national). These variables were then incorporated in a cluster analysis. Four clusters resulted: integration (36.4% of the sample); separation/ethnic (22.5%); assimilation/national (18.7%); and marginalization/diffuse (22.4%).

In the integration cluster, youth were oriented toward both their heritage culture and the national society: they preferred the integration acculturation attitude, and rejected assimilation, separation and marginalization; they had positive ethnic and national identities, used both their heritage and national languages, and had friends from both groups.

In the separation/ethnic cluster, they were primarily oriented toward their heritage culture: they preferred separation and rejected the integration, assimilation and marginalization strategies; they had a positive ethnic identity and a negative national identity, used their heritage language, but not the national language, and had friends from their own ethno-cultural group, but not from the national group.

In the assimilation/national cluster, youth preferred assimilation, and rejected the integration, separation and marginalization strategies; they had a positive national identity and a negative ethnic identity, used the national language, but not their heritage language, and had friends from the national society, but not from their own ethno-cultural group.

In the marginalization/diffuse cluster, youth appeared confused, exhibiting ambivalence and uncertainty: they had a simultaneous preference for marginalization, but also for assimilation and (to a lesser extent) separation, while rejecting the integration strategy; they had negative ethnic and national identities, used their heritage language, but not the national language, and had some friends from their ethno-cultural group, but not from the national society. This pattern resembles the “diffuse” period during identity formation (Marcia, 1994), where young people seem to lack commitment to a direction or purpose in their lives. It also resembles the classic description of the marginal person (Stonequist, 1937) who was characterized as being poised in psychological uncertainty between cultural worlds, uncertain about which way to turn.

These “profiles” were analyzed for differences in relation to some individual characteristics. Because we do not have longitudinal data, we used length of residence in the new society as a means of examining differences in profiles over time following immigration. The profiles showed a clear pattern of differences across the three length-of-residence categories. The integration and assimilation/national profiles were more frequent among those with longer residence; the proportion of integration and assimilation/national profiles among those born in the new society or with 12 years or more of residence was more than double that of those with 6 years or less of residence. In contrast, the marginalization/diffuse profile was dramatically less frequent in those with longer residence; over 45% of those with 6 years or less residence showed a diffuse profile, while only about 12% of those with the longest residence showed this profile. On the other hand, the separation/ethnic profile was almost equally frequent in all length-of-residence categories. Thus, among the most recent arrivals, the marginalization/diffuse profile dominated, while the

assimilation/national profile was very low. For those who lived in the society of settlement from birth or from their early school years on, the integration profile dominated, and the assimilation/national profile was second in frequency. In spite of these differences, a substantial group of adolescents, 20–25%, showed strong and enduring involvement with their ethnic culture regardless of length of residence.

We expected perceived discrimination to be negatively related to adolescents' involvement in the larger society, that is, to be less frequent in the assimilation/national and integration profiles. Analysis of variance showed a significant difference among the profiles in perceived discrimination: significantly less discrimination was reported by adolescents with the integration profile and assimilation/national profiles than the other two profiles. Adolescents with the marginalization/diffuse profile reported more perceived discrimination than those in the other three profiles. These results were essentially unchanged when length of residence was included as a covariate. An implication of these relationships is that individuals tend to reciprocate their intercultural attitudes (Berry, 2006). That is, when new settlers experience discrimination, they return the negative affect by distancing themselves and engage in separation or marginalization strategies. These reactions may of course then be reinforced by counter-reactions from the host community, or sections within it, resulting over time in further rounds of the same or similar processes, producing an escalation. Conversely, when discrimination is low, this positive affect is reciprocated by selecting integration or assimilation strategies. One issue is whether these variables can be seen to have any causal relationships. In a structural equation model (Berry et al., 2006, Fig. 6.2) perceived discrimination negatively impacts integration attitudes (-0.18), and promotes within-group ethnic contacts (0.14). Thus, discrimination appears to be the underpinning for acculturation strategies.

Acculturation “profiles” were significantly related to neighbourhood ethnic composition. Results showed that the integration profile was most strongly represented in the balanced neighborhoods, where there were approximately equal numbers of own-ethnic and national residents. The separation/ethnic profile dominated in communities made up entirely of the adolescent's own ethnic group, while neighbourhoods with a larger proportion of residents who were not from one's own group tended to have a higher proportion of assimilation/national profiles than those with more same-group residents. Since youth do not usually select where the family lives, we may interpret this relationship in a causal way: neighbourhood ethnic composition influences the way in which “immigrant” youth acculturate.

Gender. The proportion of males and females differed significantly across profiles, with girls more often showing the integrated profile and boys the diffuse profile. Parental occupational status showed only a modest relationship to the profiles; the assimilation/national profile was more common among those whose parents had higher status occupations (for more discussion of gender, mobility and identity, see Tharenou, this volume).

At the country level, the profiles differed depending on whether the society of settlement had been populated largely by “immigrants” (“settler societies” such as Australia, Canada and the U.S.) or whether immigration was a more recent and

less common phenomenon (e.g., European countries). In the settler societies, over 50% of the adolescents showed an integration profile. The integration profile was generally less common in European countries, typically between 30 and 40%.

The study also addressed the second question: how well are “immigrant” youth adapting to living in their new society? Previous research as indicated shows that there are two distinct forms of adaptation: psychological and socio-cultural (Ward, 1996). Two factors were indeed found: the first factor included life satisfaction, self-esteem, and lack of psychological problems (such as anxiety, depression and psychosomatic symptoms). A second factor (socio-cultural adaptation) included school adjustment and lack of behavior problems (such as truancy, petty theft). Adaptation was weakly but significantly related to gender, with participating boys having a slightly better psychological adaptation score than girls, while the boys also scored lower on socio-cultural adaptation.

We also examined how well “immigrant” youth were adapting in comparison to national youth. Overall, national and “immigrant” youth had similar levels of both psychological and socio-cultural adaptation. This is not to say that there are no differences between “immigrant” youth and national youth generally; it is to say that when “immigrant” and national youth are samples from the same neighbourhoods (where many social factors are shared) no differences were found. Among national youth, we again we found the earlier reported effect of gender, with boys having higher scores for psychological adaptation and lower for socio-cultural adaptation than girls.

With respect to our third question, is it the case that how an adolescent acculturates relates to how well they adapt?, the pattern in our findings is very clear: those in the integration profile had the best psychological and socio-cultural adaptation outcomes, while those in the marginalization/diffuse profile had the worst; in between, those with a separation/ethnic profile had moderately good psychological adaptation but poorer socio-cultural adaptation, while those with an assimilation/national profile had moderately poor psychological adaptation, and slightly negative socio-cultural adaptation. This pattern of results was largely replicated using structural equation modeling with the same data set (see Berry et al., 2006). We also examined relationships between the two forms of adaptation and perceived discrimination: Discrimination was negatively and significantly related to both psychological (-0.24) and socio-cultural (-0.28) adaptation. Thus, as for acculturation attitudes, we have some evidence of a covariant relationship between discrimination and (poorer) adaptation.

In this chapter, we have made a distinction between some different types of groups that are experiencing acculturation, including “immigrants”, sojourners and refugees. In the youth study, we sampled all three types of groups. The profiles for all “immigrant” youth were reported earlier. Now, we examine the profiles for Turkish youth who are mainly of guest worker (sojourner) origin, and Vietnamese (mainly of refugee origin) living in four European countries (Finland, France, Norway, and Sweden). A comparison of the profile distributions for the Vietnamese and Turkish adolescents is shown in Fig. 10.4, together with the distribution for all “immigrant” youth in all countries of residence.

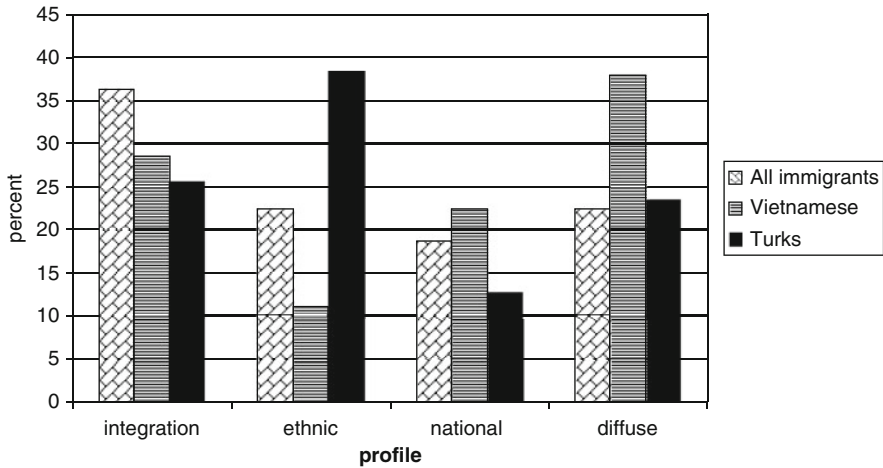


Fig. 10.4 Distribution of acculturation profiles of all “Immigrant” youth, turks and vietnamese (From Berry et al., 2006; Fig. 8.1)

For the Turks, the separation/ethnic profile was clearly dominant, and the assimilation/national profile was the least represented. In contrast, for the Vietnamese, the separation/ethnic profile is the least common and the assimilation/national profile more common than for the Turks. The integration profile, most common in the total sample, was not the dominant profile for either group. Surprisingly, the Vietnamese youth were strongly represented in the diffuse group. However, this is due largely to the higher numbers of first generation youth in this ethnic group, and is due to the recency of their immigration, rather than to difficulties in the acculturation process.

The differences between sojourners (Turks) and refugees (Vietnamese) in acculturation profile distribution appear to correspond to the motivational factors identified earlier in this chapter. In the case of guest workers in Europe, they were not intending to stay permanently in their country of sojourn; nor were the receiving societies opening up to receive them as permanent settlers or citizens. Hence becoming fully engaged with the receiving society was not as likely for them as for permanent new settlers. In the case of refugees, many were fleeing their countries of origin, with little possibility of ever returning. They are thus likely to “put things behind them”, and orient themselves more to their new societies.

We also explored the relationship between acculturation profiles and adaptation outcomes in the Vietnamese and Turks. Earlier results showed that “immigrant” youth with the integration profile had better adaptation scores than youth with any other profile. Those with the marginalization/diffuse profile had the lowest scores. Individuals with the assimilation/national profile had relatively poor psychological adaptation, whereas they were not clearly distinct from other profiles with respect to socio-cultural adaptation. In contrast, the separation/ethnic profile showed good psychological adaptation but poor socio-cultural adaptation.

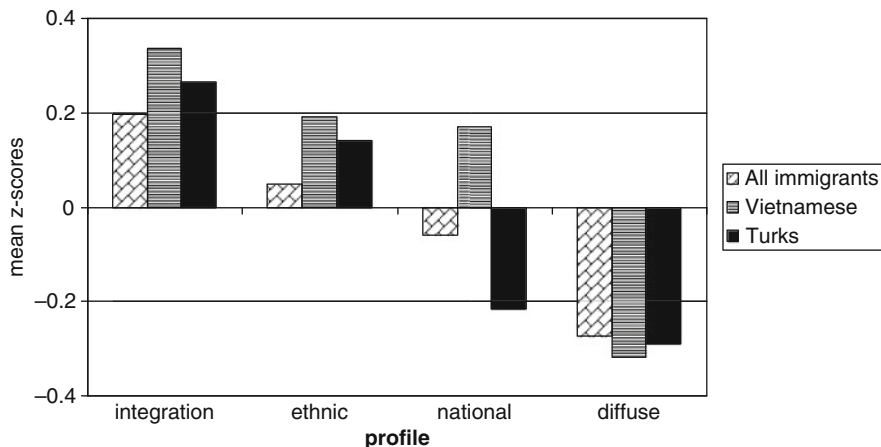


Fig. 10.5 Psychological adaptation of All “Immigrant” youth, turks and vietnamese (From Berry et al., 2006; Fig. 8.2)

The scores for psychological adaptation by profile and ethno-cultural group are shown in Fig. 10.5. There were no differences in psychological adaptation across groups; the scores for Vietnamese and Turks were largely similar. Scores varied by profile, irrespective of ethnocultural group: psychological adaptation scores for the integration profile were higher than those in the assimilation/national and marginalization/diffuse profiles; the separation/ethnic profile yielded higher scores than the marginalization/diffuse profile. These results are generally similar to those reported for all new settlers. However, within the assimilation/national profile, psychological adaptation was better for the Vietnamese, and worse for the Turks. This finding seems to indicate that there is a link between the acculturation preferences of individuals and that of their group, and psychological adaptation: acculturating in a way that corresponds with your group leads to better adaptation (for the Vietnamese) but acculturating in a way contrary to your group leads to worse adaptation (for the Turks, a double minority).

Analysis of socio-cultural adaptation by profile and ethnic group showed no difference by ethno-cultural group, but an effect of profile. Scores for the integration and separation/ethnic profiles were higher than scores for the assimilation/national profile. In contrast to our results for the entire sample, the assimilation/national profile, rather than the marginalization/diffuse profile, yielded the lowest scores for socio-cultural adaptation. This finding is largely due to the very poor socio-cultural adaptation of Turks seeking to assimilate. Furthermore, among the Turkish youth, the separation/ethnic profile, rather than the integration profile, is associated with higher levels of socio-cultural adaptation. These findings for the Turks suggests that their initial status as sojourning guest workers led them to generally prefer a separation strategy, and when they do, it is the better strategy for promoting socio-cultural adaptation. However, when Turkish youth seek to assimilate, contrary to their group’s general preference, their adaptation is much poorer (Fig. 10.6).

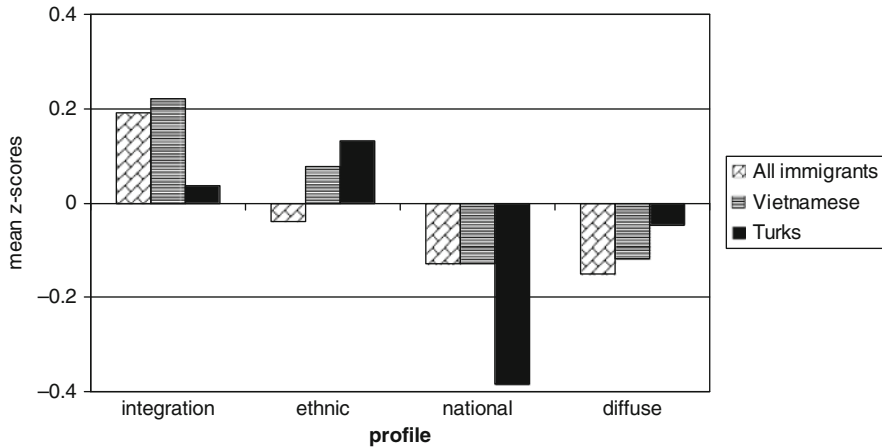


Fig. 10.6 Socio-cultural adaptation for all “Immigrant” youth, turks and vietnamese (from Berry et al., 2006; Fig. 8.3).

Conclusions and Implications

In this chapter I have sought to present some concepts and findings on the issues of how, and how well, new settlers settle into their new societies. Given the evidence available from the previous literature (reviewed by Berry, 1997 and Sam & Berry, 2006), and from the study of “immigrant” youth reviewed here (Berry et al., 2006), it is possible to venture some implications for policy and practice.

First, there are indeed variations in the ways that individuals and groups seek to acculturate. The four-fold conceptual framework was supported empirically, suggesting that it is a content-valid way to understand the options facing acculturating peoples, whether “immigrants”, refugees or sojourners. The presence of these variations in how people acculturate alerts us to the need to ask what individuals and groups are trying to achieve during their acculturation. It is not particularly sensible to simply assume that they are seeking assimilation, or indeed any other particular way of acculturating. When working with groups, and their individual members, it is essential to develop ways of assessing these differential preferences, and to discover any discrepancies that may be present between the interests of acculturating peoples and those of the larger society in which they are settled. We have found a clear preference for integration (in the sense used here as involvement in both peoples’ heritage cultures and the larger society). The corresponding way of managing cultural diversity in societies of settlement (multi-culturalism) also has some support as a positive way to deal with cultural pluralism (Berry, 1991). As a caveat however, neither of these two options is *necessarily* the best way forward, since each group’s strategy may be partly contingent on the preferred strategy of the other.

Second, there are substantial variations in how well people are adapting to their acculturation experiences. In the general literature, there is large variation in adaptive outcomes for new settlers (reviewed by various authors in Sam & Berry, 2006); in some studies, new settlers adapt less well than residents, while in other studies there are no differences. In the youth study, levels of “immigrant” adaptation were generally on a par with the comparison national samples, but there were some variations linked to gender and to length of residence. These variations need to be explored further, both in research, and when working with all kinds of new settlers and other acculturating peoples. It is not possible to assume that all those who are acculturating have poor adaptation; however, some do, and these persons need to be identified and cared for. Ideally, prevention programmes, based on research and clinical experience should be established, as recommended by Beiser et al. (1989).

Third, the relationship between how people acculturate and how well they adapt has implications for all three levels of application (also, Hernández-Plaza et al., this volume; Maynard et al., this volume). At the cultural group level, the general pattern is one that alerts both policy-makers in the larger society and ethno-cultural groups to the potentially adaptive value of seeking to combine cultural maintenance with equitable participation (i.e., multi-culturalism; see Berry, 1991). There is also evidence that cultural maintenance alone (i.e., a preference for separation) is sometimes beneficial, while assimilation and marginalization are rarely helpful ways to acculturate. At the family level, there are similar implications: the joint search for maintaining one’s heritage culture and identity (possibly emphasizing this aspect within the family and in the cultural community), and participation in the day-to-day life of the larger society outside the family, are suggested as the most adaptive way to carry out family life during acculturation. At the individual level, the adaptive value of the integration path is indicated in the youth study, as well as in the general literature. This relationship appears to be sufficiently robust to employ it as a kind of “best practice” when advising and assisting policy makers and acculturating groups and individuals (see, Furnham, this volume). However, again it is important to remember that there will inevitably be exceptions, or rather limits, to this generalization.

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Chapter 11

Mobility and Inclusion

Douglas C. Maynard, Bernardo M. Ferdman, and Tabitha R. Holmes

Abstract Individuals and families relocate from one region of the world to another for many reasons (e.g., financial opportunity, work or military assignment, family reunion, or escape from war, political unrest or natural disaster). All globally mobile new settlers, however, must negotiate the often daunting challenge of integrating into that new home region. Inclusion occurs when all members of a social group are allowed and encouraged to fully engage in the life of that social group and share their diverse talents, worldviews, and backgrounds. In this chapter, we discuss some of the most crucial factors that affect a new settler's experience of inclusion (or lack thereof). These factors range from the personal (e.g., prior mobility experience) to the situational (e.g., community composition, public opinion toward immigration) to the interaction between the two (e.g., cultural and linguistic similarity between the new settler and the host country). We argue that inclusion requires a joint commitment from both the new settler and the communities that make up her new home, and that such inclusion is likely to be at once challenging and rewarding. We close by highlighting suggestions for public policy.

Keywords Inclusion · Marginalization · Migration · Immigrants

Moving from one region of the world to another is often risky and uncertain. There are both major and minor adjustments to be made, from the language one speaks to how one completes daily errands such as buying food or traveling to and from an employment site. Finding good work can be a challenge. One's network of friends, coworkers, and neighbors will be at least partially uprooted. Amidst all this change is the matter of how the new arrival will connect with and experience his or her new social environment.

In this chapter, we focus upon factors that affect the inclusion of those who move from one part of the world to another, both in terms of the actions of individuals and groups interacting with the new settler and the subjective reality of the new

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settler herself. We believe that an understanding of this topic is more than just an intellectual exercise, because inclusion is an important issue for every human being living within a social system. For example, marginalization and exclusion (Berry, this volume) have negative consequences for the individual or outgroup who is new to a country (Abrams, Hogg, & Marques, 2004), as well as for those doing the marginalizing (Aronson, 2000). That said, inclusion is particularly crucial – and particularly tricky – for those who have just arrived from another region or country.

Foreign-born individuals make up an ever-increasing proportion of the overall population and workforce in many countries (e.g., the United States and Canada; Bond, 2007). Despite this trend, “(im)migrants” of all types are at risk for exclusion from civic, organizational, and social life. Some of this exclusion is built into naturalization laws, including limitations on voting, holding elected office, serving on juries, and holding employment with the federal government (Rubio-Marín, 2000). Other forms of exclusion may be less overt and systemic, occurring in schools, boardrooms, and communities. For some new settlers, such as employees on temporary expatriate assignment, the particular nature of the move to a new country may prevent meaningful interaction with locals (Haour-Knipe, 2001). The situation is even more striking for undocumented arrivals who are vulnerable to systematic and self-directed exclusion in many ways. Whatever the situation, a person’s experience of inclusion or exclusion can have significant social, psychological, and financial consequences. Recent research even suggests that a new settler’s frustration with discrimination can ultimately induce him to invest his energy and capital back in homeland development projects rather than in his new community (Rose, 2009).

As a beginning point, it is important to recognize that inclusion does not come naturally, or easily. By our very nature, human beings have a tendency to categorize and stereotype, to construct in-groups and out-groups. This, coupled with the challenges of living in an ever-changing, diverse world, presents challenges for cohesion and communication (Bond, 2007). As we will demonstrate, a host of contextual and interactive variables influence the challenges that individuals, groups, and societies are likely to face in attempting to include all members fully in organizational and community life. We argue, however, that the benefits of committing to inclusion are worth the hard work. By its nature, inclusion is a challenge that, once accepted, benefits everyone involved in a group or community, long-term residents and newcomers alike.

We begin this chapter with a discussion of the inclusion construct. As we will argue, inclusion is much more than just the absence of exclusion. We then explore several overarching factors that we find particularly relevant and important for understanding when individuals, groups, and communities will or will not engage in supportive, welcoming behavior. We then shift the focus from inclusive acts of others to the experiences and motivations of the settler herself¹ as she settles in to

¹To be inclusive, we alternate the use of both feminine and masculine pronouns as an indefinite reference (i.e., when we are referring to persons of either sex).

her new environment. Finally, we conclude with practical suggestions for fostering inclusion of the globally mobile (UNDP, 2009).

What Does It Mean to Be Inclusive?

Inclusion is a multidimensional, dynamic, and multifaceted construct. The concept was originally used to refer to the process of fostering the full and equal participation of people with disabilities – particularly school age children – across a range of settings. More recently, the construct has been applied to diverse populations and has now been widely adopted, particularly in the context of diversity, to refer to the complete social and societal involvement of people across a broad range of dimensions of difference.

Although diversity is often described as a source of advantage for societies and organizations (e.g., Page, 2007), scholars and practitioners studying diversity in organizations have pointed to inclusion as a key component in reaping the potential benefits of diversity (e.g., Cox, 2001; Creed & Scully, 2000; Davidson, 1999; Ferdman & Davidson, 2002b; Gasorek, 2000; Gilbert & Ivancevich, 2000; Holvino, Ferdman, & Merrill-Sands, 2004; Hyter & Turnock, 2005; Miller & Katz, 2002; Mor-Barak, 2005, UNDP, 2009; Wasserman, Gallegos, & Ferdman, 2008). These benefits can include more ideas and resources, better problem solving, more creativity, greater competitiveness, increased flexibility, and higher performance (e.g., Cox, 1993; Cox & Blake, 1991). In this view, inclusion has to do with the degree to which people are treated as valued, respected, and appreciated members of a group, organization, or other social collective. Holvino et al. (2004), for example, described it in this way:

Inclusion in multi-cultural organizations means that there is equality, justice, and full participation at both the group and individual levels, so that members of different groups not only have equal access to opportunities, decision making, and positions of power, but they are actively sought out *because* of and with their differences. In a multicultural, inclusive organization, differences of all types become integrated into the fabric of the business, such that they become a necessary part of doing its everyday work (p. 248, italics in the original).

Wasserman et al. (2008) build on this and other perspectives (Ferdman & Davidson, 2002b; Mor-Barak, 2005) by describing an inclusive organizational culture as one that “recognizes, respects, values, and utilizes the talents and contributions of all the organization’s people – current and potential – across multiple lines of difference,” where “. . . people of all social identity groups have the opportunity to be present, to have their voices heard and appreciated, and to engage in core activities on behalf of the collective.” (p. 176).

These perspectives emphasize the structural and cultural aspects of inclusion, which have to do with the ideology and attitude of organizational and other social systems toward the acceptance and expression of difference. Related to this is the concept of *social inclusion*, which usually refers to the structural integration of previously disadvantaged or marginalized communities, so that they become full

participants across a range of social domains (e.g., housing, education) and have full access to the benefits of society. Boushey, Fremstad, Gragg, and Waller (2007), for example, describe social inclusion as including “multiple dimensions of well-being” and as occurring “when all have the opportunity and resources necessary to participate fully in economic, social, and cultural activities which are considered the societal norm” (p. 3).

Based on these ideas, the Institute of Inclusion (<http://www.instituteforinclusion.org>) has developed a list of inclusive behaviors and practices that everyone in an organization can do, those that leaders should adopt, and inclusive practices for organizations (Ferdman, Barrera, Allen, & Vuong, 2009). For example, the Institute’s list “for all” suggests categories of behavior such as acknowledging, connecting and engaging with other people; listening skillfully and deeply; being curious and open to alternative views and possibilities; becoming “comfortable with discomfort”; learning from and being open to the influence of others; and respecting others and being fair (Ferdman et al., 2009). The Institute also lists organizational practices for inclusion, including building a climate of “respect, fairness, justice, and equity”; creating and ensuring a framework for developing and assessing the organization’s inclusion policies and practices, and making sure that inclusion is integrated systemically throughout the organization; supporting the development of multicultural competencies for individuals and groups; clarifying the organization’s approach to social responsibility; fostering transparency, participation, openness, and teamwork; making sure that diversity is present and valued; and engaging in and valuing ongoing learning and continuous development (Ferdman et al., 2009).

Applying these behavioral and organizational practices to the goal of fully incorporating new settlers into their social surroundings involves proactive and systematic processes. When someone settles in a different nation or culture, his new home is unfamiliar and different in fundamental ways from his place of origin. The new settler also likely differs from long-term residents in ways both obvious (e.g., appearance, language proficiency) and subtle (e.g., culturally-determined ways of interpreting social behavior). The more welcoming and supportive individuals and systems are toward new settlers, the easier the adjustment process and ultimate psychological and physical well-being (e.g., Berry, 2008; Berry, Phinney, Sam, & Vedder, 2006; Birman, Tricket, & Buchanan, 2005; Birman, Trickett, & Vinokurov, 2002; Landis, 2008; Lindert, Korzilius, Van de Vijver, Kroon, & Arends-Toth, 2008).

Grappling with inclusion is challenging in part because it is an active and dynamic process, not a final state. Because groups and societies are in flux, and because individuals are in constant state of development, inclusion involves constant re-examination and renegotiation of boundaries and practices for a group, and of identity for its members (Davidson & Ferdman, 2003; Ferdman, 2003; Ferdman & Davidson, 2002a). This happens not only as prior arrivals who have become integrated now struggle with including newer arrivals, but also as individuals change throughout their life. As a result of this ongoing process of change, inclusion must involve all parties, not just the newcomers or the “old timers” in a group. Thus, the

host society and its members can also change as a result of welcoming newcomers. Truly creating inclusion is a joint responsibility.

Finally, we draw a distinction between inclusion and non-marginalization. Marginalization occurs when individuals are kept on the fringe of organizations, communities, or other social groups to which they belong (Maynard & Ferdman, 2009). One of the first steps towards an inclusive environment is to enact procedures and policies that ensure fair treatment and equal access (Bond, 2007, Holvino et al., 2004; UNDP, 2009). Although such actions may help prevent stigma or marginalization, they do not by themselves constitute inclusive behavior, just as the absence of prejudice falls short of active appreciation of diversity.

Why Inclusion Doesn't Come Naturally

Because inclusive behavior is other-oriented behavior, to understand and promote it we must first understand how humans perceive and interact with each other (Rice & Mullen, 2004). Doing so also helps explain why the worthwhile goal of complete social acceptance and participation is so elusive.

Perhaps the most important principle of social perception extends from the general tendency of the human mind to seek patterns in the world and to attempt to categorize what it encounters (Shermer, 2003). This is a crucial mental ability, as it helps to reduce the cognitive effort required to navigate our world. We would quickly be overwhelmed if every individual and object we encountered had to be experienced as unique and new, unconnected to past experiences. A side effect of this categorization process is the formation of stereotypes (Aronson, 2007). Social stereotypes are often based on easily observable physical features (e.g., skin and eye color, clothing) and behaviors (e.g., accents in speech). Once established, stereotypes essentially act as a mental shortcut, providing information – sometimes accurate, sometimes not – about a person's situation, abilities, and likely future behavior.

It is important to note that stereotypes need not be negative (e.g., "Asians are good at math.") and they can be invaluable in solving practical problems (Schauer, 2003). However, our tendency to form expectancies based on social categories can strongly affect our behavior towards others in a way that often confirms our stereotypes, producing a self-fulfilling prophecy. In a classic study, Rosenthal and Jacobson (1968) found that children who were expected by teachers to bloom intellectually saw greater gains in scholastic achievement relative to their peers, despite the fact that "bloomers" had been assigned that label randomly by the experimenters. The teachers' expectations shaped their behavior towards these students – greater attention and encouragement, for example – which then produced the intellectual spurt. Thus, in this example, stereotypes contributed to how teachers chose to interact with their students.

The way humans naturally conceive of "others" provides an impediment to inclusion. By default, we mentally represent members of groups to which we

do not belong in simplistic and often negative ways. Rice and Mullen (2004) have shown that this tendency rears its ugly head with regard to treatment of new settlers, especially those who are relatively unfamiliar, more “foreign” relative to the host culture, and/or small in number. Explicitly, new settler groups are frequent targets of ethnophaulisms, or ethnic slurs, which portray them simplistically and negatively; such slurs are verbal indicators of attempts at exclusion and marginalization. Rice and Mullen’s historical analysis revealed that more negative and simplistic ethnophaulisms were associated with lower rates of country admission and naturalization, suggesting a direct link between how the host culture thought about the group and how they treated the group. More implicitly, simplistic public representations during the 1920s were associated with smaller head size of ethnic characterizations in illustrated children’s books at the time.

In addition, other cognitive heuristics, including anchoring and adjustment and confirmation bias, can protect stereotypes in the face of disconfirmatory information (Maynard & Brooks, 2008). The growing body of literature on implicit attitudes suggests that our unconscious associations can lead to biased treatment even when we hold explicitly egalitarian attitudes (Banaji, Bazerman, & Chugh, 2003). The upshot of our natural tendency to classify, categorize, and stereotype is simply this: inclusive behavior toward those who are different or unfamiliar does not come easily to us.

The Role of the Environment

As we suggested earlier in the chapter, inclusion is a dynamic, evolving process that involves the characteristics and experiences of individuals and groups as they interact with features of the environment. The environment, in turn, is a fluctuating, interactive system that both affects and is affected by inclusion. As new settlers work and live within certain neighborhoods, they are influenced by the availability and accessibility of formal and informal support mechanisms that are found within their communities; in other words, the environment cultivates or curtails opportunities for inclusion. At the same time, communities are influenced by an overarching ethos of inclusion or exclusion. The degree to which individuals feel accepted within their neighborhoods is often related to feelings of motivation, empowerment, and efficacy, which are all precursors to environmental change (Bond, Holmes, Byrne, Babchuck, & Kirton-Robbins, 2008). Accordingly, the environment serves as both a product and producer of inclusion.

Bronfenbrenner’s Ecological Systems Model (1979) serves as a particularly useful framework for understanding inclusion as a reciprocal, interactive process. Bronfenbrenner expanded on traditional definitions of the environment, describing it as consisting of four nested contexts that range from the immediate settings in which people live (e.g., family) to more distal contexts that indirectly influence individuals (e.g., policies, dominant ideologies). These include the micro, meso, exo, and macro systems. The Ecological Systems model offers insight into the lives

of non-native residents given that circumstances often catapult new settlers of all types into a complex system of legal, political, and cultural contexts that directly and indirectly affect their lives. By conceptualizing the environment as a broad, differentiated system of overlapping and interactive contexts, we can understand the environmental complexities that are involved in processes of inclusion. Accordingly, taking Bronfenbrenner's cue, we view a new settler's social, cultural, economic, and political environment as dynamic rather than static, and as having a reciprocal rather than a unidirectional relationship with its inhabitants. Below, we discuss each of his four systems as it relates to inclusion.

The Micro-System

The most direct and immediate context in the Ecological Systems Model is the *micro-system*, a setting in which a developing person interacts "face-to-face" with the physical, social and symbolic features of the environment. It encompasses a person's family, work, school, and peer group, along with the physical elements (e.g., noise, pollution, cultural artifacts) that are located within the environment. In terms of understanding inclusion in this context, researchers have focused upon individuals' social networks and the degree to which they serve to facilitate or fracture social integration within the wider culture. In particular, researchers have emphasized the importance of social for new settlers, noting that the conditions under which a person relocates to another culture will inform the type of social networks that will be available, and the ease with which integration into the larger culture may occur (Kuo & Tsai, 1986). Students, for example, are often embedded in a community of international peers who can provide ready-made informal and formal support. Similarly, "chain migrators", individuals who immigrate into a country after friends or family members are established in the new country, typically have a support network at their disposal that can provide immediate resources. On the other hand, skilled, highly educated workers may not have a pre-existing network upon arrival in a new culture, though their social and language skills may facilitate the creation of new connections with others.

For the most part, research has demonstrated that when new settlers initially settle in communities with pervasive, well-established co-ethnic networks, they benefit from the provision of emotional and instrumental support that is typically provided by individuals with similar histories and cultural practices (Massey, Alarcon, Durand, & Gonzalez, 1989; Tsai, 2006; see also, Ager & Ager, this volume; Berry, this volume). Such networks can ease the transition into a new culture by providing information, labor market strategies, and tools of survival in the new culture, assets that inevitably contribute to social integration. The characteristics of the network, however, are important to consider. Enchautegui (2002) found that employment chances are highest for a new settler when he or she co-resides with a recent settler rather than a longer-term one. This finding suggests that the duration of a network member's residence may inform how, when, and where inclusion opportunities are identified, and underscores how a microsystem can directly influence

pathways to inclusion or exclusion. Thus, if we want to understand a process such as economic incorporation, arguably a critical pathway to inclusion, we must explore proximal-level systems.

As illustrated above, an individual's immediate setting serves as a critical platform for inclusion opportunities; however, according to Bronfenbrenner, in order to understand these micro-level interactions and processes it is necessary to understand the larger contexts in which microsystems are embedded. For example, we cannot appreciate how new settlers and refugees interact with their neighbors and co-workers without considering how community and cultural norms, social policies, and organizational barriers might affect the development of these relationships over time (Carr, Chapter 7 this volume; Podsiadlowski & Ward, this volume; UNDP, 2009). We will now discuss examples of these distal contexts.

The Meso-System

In the Ecological Model, the *meso-system* is a system comprised of two or more micro-systems; it is the "linkages and processes taking place between two or more settings containing the developing person" (Bronfenbrenner, 1993, p. 22). The meso-system is particularly important for researchers interested in inclusion, given that it serves as a bridge between the information, knowledge, and attitudes that exist in different sectors of an individual's social world. How new settler children are socialized to respond to adults, for example, may differ between the home and school. This discrepancy, in turn, may affect the relationship that children foster with their teachers and parents (Rogoff, 2003).

One link that has interesting implications for new settlers is the relationship between workplace and neighborhood support systems. In a study conducted by Hagan (1998), for example, network resources and constraints were examined as they differentially affected Mayan men and women who relocated to Houston. Both groups initially benefited from the social resources that the co-ethnic community members provided. However, this pattern diverged when the new settlers entered the workforce. For the most part, men became employed in local retail establishments that provided ample opportunities for them to work side-by-side with a variety of community members from diverse backgrounds. As the men worked in their own neighborhoods, they were able to connect with local residents and organizations that promoted community gatherings, and strengthened and diversified their social networks (see also, UNDP, 2009, pp. 61, 101).

Conversely, Hagan found that women were typically employed as domestic workers, jobs that sent them to affluent enclaves where they were unable to form horizontal relationships in co-ethnic and nonethnic networks. This isolation limited the degree to which they could form reciprocal social relationships with co-ethnic peers, the hallmark of many working class neighborhoods. Moreover, it greatly restricted women's interactions with native residents who could share cultural information. Thus, the type of work setting plays an important role in how social networks

are cultivated and maintained with both native and non-native community members. This suggests that to fully understand how micro-level support networks influence inclusion we must explore individual differences in how and when co-ethnic networks are useful at various stages of the integration trajectory within certain environmental contexts.

The Exo-System

The *exo-system* is an environmental context that involves settings and activities that do not contain the developing person; these events influence individuals indirectly through their impact upon the immediate environments in which individuals live. Policy decisions fall within this system and should be of particular interest to those interested in the inclusion of new settlers. In the United States, for example, policies have historically treated new settlers from different parts of the world in different ways. Beginning in 1790, Congress passed naturalization laws that prohibited “non-White immigrants” from becoming citizens; these racial restrictions were in place until 1952 (Martínez, 2007). Although a national origins quota system was abolished in 1965, current policies now favor those with advanced skills and training that can benefit the U.S. economy (Yakushko, 2008). Similar policies currently exist in other nations with a long history of new settlement, such as Australia (Khoo, 2002).

It is unclear how such policies may affect inclusion. At a basic level, allowing differential access and subsets of the global community into a country influences what type of social networks are available to new settlers and the degree to which “host communities” benefit from diversity. Presumably it also influences perceptions and stereotypes as certain groups become minorities within groups of those from a certain nation. This, in turn, may affect the expectations and treatment of certain groups with implications for social integration.

Obviously, governmental policies toward non-native residents do not appear out of thin air. Current policy stems from both the current socio-political climate and the country’s own immigration history. Germany, for example, has had a protective, relatively non-welcoming tradition that viewed workers recruited from other countries as temporary, despite the fact that many of them never returned to their home countries (Rubio-Marín, 2000). The limited post-arrival opportunities for, and negative public opinions about, foreign-born individuals even of Germanic ancestry underscore Germany’s restricted immigration policies (Schuck & Münz, 1998). Inclusion is likely to be particularly challenging in such countries, and some have claimed that “immigration swings,” along with public reaction to newcomers, will be more intense for these countries, as compared to settler nations built on immigration like the United States and Australia (Freeman, 1994).

Other aspects of the exo-system important to inclusion are the structural and organizational characteristics of the environment. The number of community-based organizations within a neighborhood, for example, influences perceptions of social

cohesion, particularly in heterogeneous communities (Andrews, 2009). Of particular interest are organizations that promote civic participation (UNDP, 2009, p. 101). As scholars have noted, political participation often encourages social capital in the form of trust, reciprocity, and feelings of connection among community members (Lelieveldt, 2004). Thus, the availability of opportunities for democratic and political participation may serve as a precursor to a climate of inclusion.

The Macro-System

The *macro-system* serves as an overarching cultural blueprint for how the ecological system, in its entirety, operates; it encompasses the dominant beliefs, ideologies, and lifestyles that are common in a particular culture at a particular time. One element of the macro-system relevant for understanding inclusion involves the general ethos surrounding new settlement – that is, how non-native residents are viewed in the media and public discourse.

Despite the fact that the United States is often portrayed as the quintessential “melting pot”, many of its citizens have a hostile attitude toward new settlers, particularly when faced with economic problems (Jaret, 1999); people who are not native-born American citizens are often viewed as unnecessary, if not distasteful, ingredients in the proverbial pot. Moreover, immigration is often seen as a threat to the welfare and available resources of native-born individuals (Pratto & Lemieux, 2001). Events and experiences, ranging from the September 11th terrorist attacks to the strain caused by high unemployment rates in regions near national borders, can strongly affect public opinion on this issue. Indeed, in times of perceived national threat, attitudes toward new settlers are more negative (Esses, Dovidio, Semenya, & Jackson, 2004). Similar “anti-immigrant” attitudes exist elsewhere, of course, as evidenced by the proliferation of xenophobic groups in many countries around the world (Rydgren, 2003). Clearly, such a view affects inclusion processes at all levels of the ecological system, from policies to organizations to face-to-face interactions (Bouchard & Chandler, 2004). Depending on the source of the tension, particular groups of new settlers (e.g., Mexicans in states that border Mexico, new settlers of Arab descent following the September 11th attacks) may be the target of hostility and exclusion.

More generally, cycles of nationalist or nativist sentiment in the host country are likely to affect attitudes and behavior toward new settlers. Nationalism revolves around the perceived superiority of one’s nation, whereas nativists conceive of a geographical group, such as a community or society, as comprising only those born in that locale or those with direct kinship to those born there. People who espouse nationalism or nativism experience greater perceived threat from new settlers and hold more negative perceptions of them than those who do not harbor such attitudes (Esses et al., 2004). Interestingly, patriotism by itself, defined specifically as affection for and pride in one’s nation, seems to be unrelated to rejection of new settlers.

The Person-Situation Interaction

How people within environmental systems respond to new members also depends on the interaction between the characteristics of a new settler and of the host country (Carr, Chapters 1 and 7, this volume). The notion of person-environment fit has received a great deal of attention in social and organizational psychology as an important predictor of individual behavior and well-being (e.g., Kristof-Brown, Zimmerman, & Johnson, 2005; Ostroff & Judge, 2007). A related type of fit that applies to global mobile groups and individuals is the similarity between one's previous and current situations. Individuals and organizations will find it easier to be inclusive toward those new settlers who share at least some common cultural ground. When language, customs, and belief systems are radically different, even sincere attempts at inclusion can backfire. For example, Fadiman (1997) described a situation where a Hmong employee in the U.S. quit his job upon receiving a promotion rather than work at a higher level than fellow Hmong workers.

Language is so crucial to navigating one's social world that its importance for inclusion cannot be overstated. For example, Akresh (2008) found that individuals suffered less occupational downgrading (i.e., having to settle for a lesser job in one's new home) when a new settler's home country was similar to the host country in terms of language and economy. Tsai (2006) found that among Taiwanese children in the United States, limited English proficiency became a label that hindered the formation of friendships with native children and even made them targets for mistreatment from natives. Finally, successfully navigating the health care, tax, and legal systems is particularly difficult without proficiency in the official language of one's home country.

Racial similarity can play a role as well. In the school, for example, a child of obviously different ethnicity can stick out and such children are often at risk for race-related teasing and bullying (Tsai, 2006). It hardly need be noted that in a non-inclusive environment such as this, the color of one's skin can itself result in marginalization. Perhaps partly as a result of this, new settler children tend to cluster with others of similar ethnicity (Phan, 2003), and this tendency is especially pronounced for proportionally small groups of new settler children, relative to the majority group. This suggests that at some point, both the in-group and the out-group may consensually engage in social separation for different reasons, although this does not guarantee that such an arrangement is in the best interests of either group (Abrams et al., 2004; Berry, this volume).

One type of exclusion that seems to commonly result from language and culture conflicts is poor fit between new settlers' work skills and desires and the employment they are able to obtain (Carr, Chapter 7 this volume; Podsiadlowski & Ward, this volume). Many adult new settlers with professional skills and training end up in jobs that under-utilize their talents (Fadiman, 1997). It is well-established that non-native residents experience relatively higher levels of unemployment than native citizens, but *underemployment* is also a particular problem for this group, especially among the first generation (Slack & Jensen, 2007). Such insufficient employment takes a variety of forms, including overqualification, involuntary employment in

part-time, temporary or intermittent jobs, low pay relative to one's peers or one's previous job, or some combination of these (Maynard, Joseph, & Maynard, 2006).

Both unemployment and under-employment are likely due to a combination of factors (Podsiadlowski & Ward, this volume). Outright discrimination is certainly a contributor (Tyyskä, 2007). Perhaps just as prevalent, though less obvious, are the non-recognition of foreign degrees and limited awareness of, and access to, employment networks and opportunities (Baulder, 2003; Podsiadlowski & Ward, this volume). Regardless of their source, employment problems such as these can be seen as manifestations of marginalization and are likely to be more severe for new settlers whose language and culture are significantly different from those of the host country.

The New Settler's Perspective

Up until now, we have focused upon the factors that influence whether the receiving communities, schools, and organizations will act in ways that foster full acceptance and participation of new arrivals. However, new settlers come to the situation with varying histories, hopes, and motivations. These psychological factors will affect the likelihood that inclusion is experienced or even desired. In this section, we explore the role of the new settler's perspective in shaping interpersonal dynamics.

Definitions of inclusion have traditionally focused on the actions people engage in towards members who are new and/or different, as described earlier in the chapter. However, psychologists and organizational scholars have also begun to focus on the relational and experiential aspects of the construct. For example, Ferdman and colleagues (e.g., Davidson & Ferdman, 2003; Ferdman, 2010; Ferdman et al., 2009; Ferdman & Davidson, 2002b) have differentiated between affective inclusion, or the feelings and experience of inclusion, and inclusive behavior. In this conceptualization, the *experience of inclusion* is "individuals' perception of the extent to which they feel safe, trusted, accepted, respected, supported, valued, fulfilled, engaged, and authentic. . . both as individuals and as members of particular identity groups" (Ferdman et al., 2009) – essentially, the psychological sense on the part of individuals that they are indeed being included. This feeling helps meet one's basic need of belonging with others and of identifying oneself in relation to others (Tharenou, this volume), and allows for individuals to grow and reach their potential (Pratto & Lemieux, 2001).

The Life Narrative

The new settler likely understands her current situation through the lens of her previous experiences and future expectations, and this understanding will shape her perceptions and actions. Why did I relocate? Did I move out of desire or necessity, or perhaps both? How long will I stay? Was this my first move, and will it be my

last? What is the role of my identity in this process, and how willing and able am I to adapt or shift my identity? We believe that a person's answers to such questions say a lot about the meaning they ascribe to the decision to move, the move itself, and the aftermath. There are many features of a global mobility story that will affect how the new settler interacts with others in the host country (Inkson & Thorn, this volume). In this section, we focus on three central ones: History, volition, and permanence.

Mobility History

Every mobility story is experienced against the backdrop of the individual's unique history. For some new settlers, the move will be their first, and for some of those, all of their lives up to this point have been spent in a particular village, town or city. Others have moved multiple times. Military families, for example, get used to picking up and re-settling in another location every several years (Burrell, 2006). Refugees have been known to move twice, first to the host country, followed by a secondary, internal move to rejoin family in another part of the country (Fadiman, 1997; Inkson & Thorn, this volume).

How will a pattern of repeated moves influence inclusion? Those used to the process of moving from one region of the world to another are likely to have learned strategies for doing it effectively. Part of this might include things such as where in a city one can usually go to get information and the types of groups, activities, or events that help make connections with locals or fellow new settlers. Essentially, frequent movers may know how to connect smoothly and quickly with those in their new surroundings. For example, military families who relocate regularly display improved coping skills and their adolescents exhibit fewer behavioral problems relative to those families who relocate less frequently (Palmer, 2008). On the other hand, those who move regularly may see their current home as temporary and as a result may choose not to expend significant effort in getting involved in social organizations, interacting with neighbors, spending time outside work with colleagues, and so on.

Reasons for Moving

One central feature of a person's new settlement story is the set of reasons for the move, and the extent to which it feels voluntary or involuntary (Furnham, this volume). Some will move out of sheer necessity – to stay may mean extreme risk to one's physical safety and psychological well-being, as well as those of family members. This is most true of refugees fleeing from war and natural disaster (Ager & Ager, this volume; Miller, this volume). Other individuals may feel more in control of the decision to migrate (Inkson & Thorn, this volume). In recent decades, there has been a shift from family-focused mobility (i.e., reunion of families) toward economic opportunity-focused mobility, especially among highly-trained professionals, such as scientists and scholars (Bouchard & Chandler, 2004). Such moves likely feel

voluntary. This shift is particularly true for women (Tharenou, this volume), who are increasingly deciding to move in order to improve their life situation rather than to reconnect with family (Agustín, 2007).

Conceiving of global mobility as either voluntary or involuntary is simplistic and problematic, however. First, most individuals will experience a mix of both pull (e.g., job prospects, quality education, or family abroad) and push factors (e.g., negative conditions at home), which vary in terms of valence and certainty (Baruch, Budhwar, & Khatri, 2007; Carr Chapter 7 this volume; Hatton & Williamson, 1998; Pedraza, 2006). Second, a situation that appears to be voluntary may hide elements of external pressure. For example, workers on international assignment (expatriates, discussed in greater detail below) often feel coerced by their organization to accept the assignment; to decline is to risk career stagnation (Haour-Knipe, 2001). Third, the reverse-case could be made, namely that all mobility has some component of choice. Agustín (2007) argues that there is some active decision-making even within constrained or unpleasant situations, such as the decision to accept informal, stigmatized, or even illegal work. Some individuals may prefer to work at the margins, where there is less autonomy and security, but also potentially freedom from taxation, bureaucracy, and some responsibilities. Finally, some new settlers may accept a risky, difficult life in a new country or region, in place of an even less palatable one back home (Agustín, 2007).

All else being equal, we believe that a new settler who feels she freely made the decision to move will be more likely to engage with her new social environment than one who experiences the move as involuntary (Horgan, 2000). Among expatriates living in Geneva, Switzerland, studied by Haour-Knipe (2001), those who most embraced the move were more engaged in their communities and were more likely to send their children to local rather than international schools. On the other extreme, refugees who never imagined leaving their homeland may feel little need to connect with those in their new locale. Rather, the primary goal may be to reestablish a life as similar as possible to the one they had beforehand. As a result, inclusion will be a challenge, and may not even be desirable to the refugees. As Anne Fadiman, writing about Hmong refugees in California, puts it, “involuntary migrants, no matter what pot they are thrown into, tend not to melt” (Fadiman, 1997, p. 183). In such situations, governments and agencies may need to re-think what a successful relocation means, moving away from notions of integration and towards markers of individual and community well-being (Hernández-Plaza et al., this volume).

Permanence

Just as individuals’ mobility history will influence how they interact with their social environment, the perceived permanence of the move will affect how new settlers navigate their current home. To be sure, many who move expect that it will be permanent. However, not all who believe they will stay permanently in their new home actually do, and other new settlers see their stay as temporary even before landing (Agustín, 2007). Interestingly, someone’s experience of inclusion may lead

to a desire to stay permanently, even if he initially viewed the move as temporary. Baruch et al. (2007) found that foreign Master of Business (MBA) students studying in the UK or the USA were more likely to stay after receiving their degrees when they adjusted well to their new life, received social support from host country students, and had strong family ties in the host country.

One group of globally mobile individuals for whom a temporary nature of the move poses particular challenges is expatriates. As they typically have a specific return date to their home country (usually 3–5 years after arrival; Selmer, 1995), one might expect that expatriates would be likely to invest less time and energy into connecting with members of the community and even coworkers. At least one study, however, found the opposite; the transient nature of the expatriation experience led female professionals to more proactively seek out other expatriates as friends and join professional associations (Napier & Taylor, 2002).

For expatriates, the move back home, or repatriation, can be as stressful as the move abroad. Surprisingly, inclusion after repatriation is difficult, even with one's long-time coworkers, partially due to changes in the organization, and partially due to individual development during their international assignment (Haour-Knipe, 2001). Perhaps as a result, many repatriates leave their organization within a year or two of returning home (Baruch, 1995; Tung, 1998). While it is understandable to expect employees to need more support moving abroad than moving home, these findings suggest that organizations need to thoughtfully prepare for a returning employee's re-integration into the company in a way that utilizes their new international expertise.

The life factors discussed above – past mobility history, reasons for moving, and anticipated permanence of the most recent move – are likely to influence one's desire for inclusion in the wider society and therefore one's interactions with his or her social environment. However, few individuals desire isolation and non-acceptance – for example, Brewer's (1991) optimal distinctiveness theory posits that individuals seek a balance between inclusion and distinctiveness (see also Berry, this volume). So perhaps it is more accurate to suggest that one's life circumstances and experiences will affect not *whether* one desires inclusion, but *with whom* or *in what setting* one desires inclusion.

Commonly, individuals and families experience inclusion by settling in neighborhoods comprised primarily of individuals and families from a particular nation or world region. Living and working with others from one's home country can certainly aid in the retention of one's home language and customs. In-group networks, however, can work to disenfranchise new settlers and dissuade broader social inclusion by reducing the need and desire for individuals to develop new social contacts and social roles that are immersed in the larger culture (Walker, 1977). Research on adolescents, for example, has found that, when available, young new settlers gravitate to ethnically similar peers as a way to avoid the embarrassment and frustration most commonly associated with language difficulties that impede cross-ethnic interactions (Tsai, 2006; Berry, this volume). Thus, although in-group friendships can serve as a protective factor, they can also perpetuate exclusion from the majority culture(s). Granovetter (1973) made this point when he noted that strong ties

with in-group family and peer networks can disadvantage new settlers when it costs them opportunities to forge and formulate “weak ties” with new community members.

The Flow of Time

Finally, we wish to draw attention to the passage of time as a factor that influences both the act of inclusion and the experience of it. Mobility itself is an act that terminates (for the moment, at least) when one arrives in a new location. Agustín (2007) asks at what point a person ceases to be a “migrant”, suggesting that the move is far from the last phase of the transition. We argue that the experience of global mobility continually shapes subsequent events and psychological states, although its impact may become more subtle as time passes.

Time in country seems to have the potential to help global new settlers overcome problems that they tend to face initially. High school drop out rates are lower for new settler teenagers who have been in their new country longer, as compared to newer arrivals (White & Kaufman, 1997). In the work context, while many new settlers experience underemployment upon arrival, many do obtain more appropriate employment eventually (Akresh, 2008). Such a progression will depend upon many factors, including the reason for mobility (Carr Chapter 7, this volume). For example, individuals moving specifically for employment reasons experienced little underemployment, whereas refugees experienced a particularly steep downgrade but also a sharp recovery. That said, new settlers as a group may never quite obtain employment or compensation commensurate with their talents and experience.

Some even argue that a certain level of inclusion can be expected simply from extended periods of time spent as neighbors, fellow classmates, or co-workers. Gibney (2004), for example, suggests that over time, trust and shared identity will eventually coalesce among diverse groups in a community who share common practices, experiences, and political structures for a prolonged period of time (Tharenou, this volume). This seems both easier and more likely for younger new settlers, however (Fadiman, 1997).

For those arriving at a country that speaks a language different from their own, eventual proficiency in this new tongue comes with practice and certainly makes it easier to connect with others in one’s social environment. White and Kaufman (1997) found that new settler children were less likely to drop out of high school if they spoke English in the home, in addition to their native language. However, effort is required to see such improvement, and there may be various reasons why a new settler may choose not to invest such effort, such as inertia due to life in an ethnic community where one can get by in her native tongue, lack of time due to work and family responsibilities (Fadiman, 1997), or the perceived temporary nature of the move (Haour-Knipe, 2001). Also, to the extent that such children seek to assimilate, rather than become bicultural, their parents may feel less included, because they experience less acceptance of their home language and culture (Berry, this volume).

Time can play a more sinister role in environments (e.g., organizations, schools, communities, societies) where marginalization has been allowed to exist. Exclusion that goes unchallenged has a tendency to become institutionalized in both explicit policy and implicit codes of conduct (Abrams et al., 2004). In a similar vein, stigma experienced by a new settler initially may continue indefinitely, regardless of increasing understanding of the language and customs of his new home; it is well established that social labels are not easily shed once applied (Bergman & Chalkley, 2007; Rosenhan, 1973).

Conclusions and Recommendations for Policy

As we have seen, inclusion is a complex, bi-directional process involving both behavior and subjective experience that are affected by a host of individual, environmental, and interactive forces. Because intercultural contact requires the active participation of at least two parties, we suggest that all sides require some degree of both accommodation and assimilation (Berry, this volume). These concepts are analogous to the Piagetian concepts of the same names used to explain our developing cognitive representation of the world (Piaget, 1951). From the new settler's perspective, the degree of inclusion experienced will depend not only on how much the environment and the people around him accept and respond to his needs and preferences, but also on how much he adjusts his expectations and behavior to the realities of his new social environment. One paradox of inclusion is that, for someone to feel he can fully define himself as a member of a new collective he will have to change his self-definition in some way, so as to incorporate his surroundings as part of his new identity (Tharenou, this volume). Thus, some degree of assimilation also typifies the inclusion process (Berry, this volume).

Problems arise when the adaptation comes solely from the new settler(s) and no reciprocal adaptation takes place in the receiving society. Both the new arrival and his social environment must make room for each other while retaining their essential character (Davidson & Ferdman, 2003; Ferdman, 2003; Ferdman & Davidson, 2002a). One side cannot be expected to do all of the work, or make all of the sacrifices. For example, someone truly supportive of full inclusion of a particular new settler group would neither expect members of that group to think, behave, or identify exactly as they did in their original country, nor expect full assimilation to the new host country. Indeed, full inclusion would mean that the new settler group is accepted and valued with their differences, not in spite of those differences.

Policy Implications

The empirical research we have described, coming from a variety of disciplines, provides some useful clues as to how we might promote inclusion in our communities, schools, and work organizations. As mentioned earlier, while initiatives aimed

at reducing prejudice are important and laudable, we must also encourage efforts to create and sustain social environments that proactively promote acceptance and inclusion. Below are a few recommendations for interventions that we find both intriguing and plausible.

First, we have stressed how crucial language skills are for developing new social networks, navigating one's environment, and taking advantage of employment opportunities and various governmental programs. Many cities have language institutes, although they may be costly or inconvenient. We encourage the development of programs that make language learning more accessible to individuals constrained by income and family responsibility. In addition, some institutes have exchange programs where speakers of two languages converse in mixed pairs, with one person being a native speaker of one language, and the other being a native speaker of the other. The pair converses in one language for the first half of the meeting, and the other language for the remainder (see also, Selmer, this volume). If implemented more widely, such programs have the potential to not only improve speaking and writing skills but also develop valuable cross-boundary relationships, which help promote more nuanced, less simplistic ways of viewing other social or ethnic groups (Abrams et al., 2004).

Specific to school settings, Tsai (2006) argues that staff members (i.e., teachers, nurses, and psychologists) need to proactively advocate for new settler children (see also, Frieze & Li, this volume) and fight against the natural tendency for children to create the in-groups and out-groups that hinder communication, understanding and empathy. According to the Common Ingroup Identity Model (Gaertner & Dovidio, 2000), encouraging students to reconceptualize the in-group as being more inclusive through the establishment of superordinate goals may help in this regard (Esses et al., 2004).

One well-established pedagogical tool which has been empirically shown to foster cross-group understanding and tolerance while also producing established gains in learning is Eliot Aronson's "Jigsaw Classroom" (Aronson, Blaney, Stephan, Sikes, & Snapp, 1978; Walker & Crogan, 1998). This technique was designed originally to help reduce inter-ethnic prejudice in the classrooms of the United States. Students work on learning classroom content in small groups, with each student responsible for one aspect of the material (akin to a piece of the larger puzzle). Students across groups also meet in "expert groups," comprised of those all assigned to the same material. The process encourages teamwork, creates inter-dependence, and allows each student to become an invaluable contributor to the overall group, which ultimately tends to override pre-existing negative stereotypes that the students may have. The Jigsaw approach would seem to be particularly valuable in classes comprised partly of children who have recently arrived from other countries, although the results achieved seem to depend on various factors, such as grade level and the nature of student assessment (Bratt, 2008).

Some citizens are likely to be more open to inclusive behavior than others. One attitude that presents a particular challenge is social dominance orientation (Pratto & Lemieux, 2001). Individuals high in social dominance orientation believe that the superiority of some groups over others is proper. Persuading those with a high

social dominance orientation of the benefits of inclusive immigration or civil rights policies, or affirmative action policy, for example, might seem to be a tall order. Fortunately, policies such as these represent socially ambiguous situations that may be framed in different ways that are persuasive to different groups of people. Pratto and Lemieux (2001) found that messages in favor of a proposed policy that were framed in hierarchy-enhancing ways were appealing to those high in social dominance orientation, whereas hierarchy-attenuating arguments for the same policy were convincing to those low in social dominance orientation. Furthermore, depending on the issue, group membership may be defined in terms of civic membership and a shared stake in the future of a community or organization, rather than ethnic group or nation of origin.

Most of the recommendations above are based upon inter-group interaction, clearly a pre-requisite for inclusion. It is important to note, however, that mere exposure is not likely to be sufficient and might actually be harmful. Built into Gordon Allport's (1954/1979) famous contact hypothesis is the notion that not all situations are equally appropriate venues for inter-group interaction. In addition, research on self-fulfilling prophecy (e.g., Rosenthal & Jacobson, 1968) suggests that mere exposure to others who are different from us might not be enough, as our stereotypes can lead to behavior that seems to confirm what we already believe. Therefore, any efforts to increase inclusion need to incorporate environmental features conducive for the growth of positive contact between diverse groups, such as shared and interdependent, super-ordinate goals (for a review, see Carr, 2003). The interested reader is further encouraged to refer to Allport's seminal work, as well as more recent research (e.g., Pettigrew & Tropp, 2006).

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Chapter 12

New Settlement and Wellbeing in Oppressive Contexts: A Liberation Psychology Approach

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and Virginia Paloma

Abstract This chapter examines the role of community, relational and personal factors in the wellbeing of new settler populations, based on our research and experience with Moroccan new settlers in southern Spain for more than a decade. Taking a liberation psychology approach, wellbeing is conceptualized as a multilevel and value-dependent phenomenon, strongly related with power dynamics and values of social justice in the host society. At the community level, new settlers' wellbeing requires equal access to key resources such as housing, employment, income, community services and formal social support, as well as intergroup relations based on values of respect for human diversity. At the relational level, wellbeing is based on positive and supportive relationships with both compatriots and the host population, and equal opportunities for social participation. At the personal level, wellbeing relies on personal control, self-determination and positive identity. The liberation psychology perspective is proposed as a necessary and innovative framework for research and practice with new settler populations under oppressive conditions.

Keywords New settlement · Wellbeing · Power · Oppression · Liberation psychology

Abbreviations

CESPYD Coalition for the Study of Health, Power and Diversity
OECD Organisation for Economic Cooperation and Development
HLM Hierarchical Linear Modeling

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International new settlement has become a defining feature of our current globalized world; for example, 34.8% of total population in Luxembourg is foreign-born,¹ 24.1% in Switzerland, 19.8% in Canada, 13.0% in the United States, 12.9% in Sweden, and 11.9% in Spain (OECD, 2008). Motives for new settlement may vary from the desire to look for professional and career development opportunities, better salaries and working conditions, or a more favorable climate, to natural and man-made disasters such as war conflicts, dictatorial political regimes, extreme social inequalities, poverty, famine and the systematic exploitation of natural and human resources. Independently of the motives for new settlement, international mobility has usually the aim of improving individuals' living conditions and wellbeing. However, these expectancies are not always fulfilled, particularly in host contexts where new settlers are relegated to the most precarious employment sectors and marginalized areas with limited access to community resources (Hernández-Plaza, Pozo, & Alonso, 2004; Martínez, García-Ramírez, Maya, Rodríguez, & Checa, 1996; Portes & Rumbaut, 1996; Soon & Fisher, 2005).

This is the case of Moroccan new settlers in Andalusia, the most southern region of Spain, and one of their main gateways to Europe. The main motive of Moroccan new settlement to this region has been the lack of employment opportunities and social inequalities in their home country, together with the strong demand of labor force associated with the economic development of Spain during the last decades (Martínez et al., 1996; Martínez Veiga, 1997, 1999). Moroccans are the second most numerous foreign-born group in Andalusia² (see Fig. 12.1), where they get the most precarious jobs in terms of hardworking conditions, instability and low salaries; they

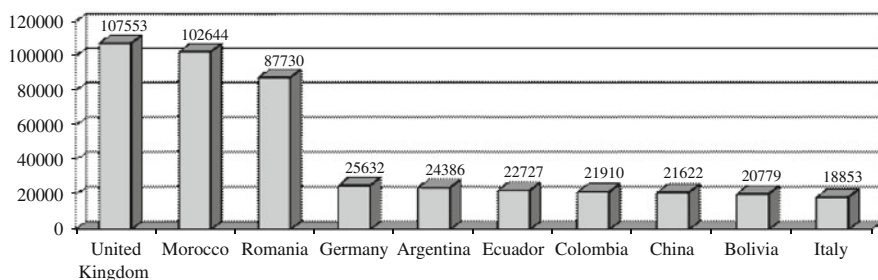


Fig. 12.1 Foreign-born population in Andalusia by country of origin (Source: OPAM, 2009. Information provided by the Spanish National Statistics Institute. Population census, 2009)

¹According to the OECD (Organization for Economic Cooperation and Development), the foreign-born population of a country refers to all persons who have their usual residence in that country, and whose place of birth is located in another country (see <http://stats.oecd.org/glossary/detail.asp?ID=1022>).

²According to the official census of legal residents, nationals from the United Kingdom are the first foreign-born group of residents in Andalusia. However, when the number of illegal residents is taken into account, Moroccans are the most numerous group, although the real size of this population cannot be gauged precisely (OPAM, 2009).

work in intensive greenhouse agriculture, as constructor laborers, or hotel workers, and usually live in isolated rural areas or marginalized urban neighborhoods, with limited access to basic community resources (Hernández-Plaza, 2003; Hernández-Plaza et al., 2004; Martínez et al., 1996). The proposal described in this chapter is based on our research and experience, over more than 10 years, with this new settler population in Andalusia. Our approach is not necessarily applicable to all new settler situations around the world, but it may be particularly relevant for refugees, asylum seekers and displaced persons who suffer disadvantageous and oppressive conditions in their receiving countries.

Wellbeing, Acculturation and Power

Since the work developed by Thomas and Znaniecki (1918) in their classic study *The Polish peasant in Europe and America*, much has been investigated and theorized about the process of incorporation of new settlers into diverse contexts, from many different perspectives. Taking a liberation psychology approach (Montero & Soon, 2009; Nelson & Prilleltensky, 2005), new settlement can be conceptualized as a process of ecological transition that involves the incorporation into a new physical and socio-cultural context, with important changes in prevailing norms and values, the social position of individuals, their labor and economic situation, their network of interpersonal relationships and their general living conditions. Proposed by the social psychologist Ignacio Martín-Baró in the mid-eighties (1986, 1994), liberation psychology tackles the underlying dynamics of power in human relations with the aim of transforming social conditions of inequality and oppression. One of the aims of liberation psychology is to identify, analyze and transform the ideologies of dominant and oppressed groups, expressed through attitudes and behaviors, which legitimate and sustain the status quo, and contribute to maintain and naturalize asymmetrical power relations amongst diverse social groups.

The liberation psychology perspective assumes an ecological view of the human being which emphasizes the dynamic interrelatedness of people and systems, with ecological factors influencing personal characteristics, and individuals in turn shaping their ecological environments. The ecological approach flows from the value of holism, suggesting that communities are open systems with many different levels and connections. Taking this perspective, we conceptualize wellbeing as a positive state of affairs across individual, relational and community domains (Nelson & Prilleltensky, 2005; Prilleltensky, 2008). This ecological approach will allow us to examine the incorporation of new settlers into diverse settlement contexts in terms of asymmetrical relations between newcomers and host populations, based on dynamics of power and oppression, domination and subordination, privileges and resistance, at diverse ecological levels (Soon & Fisher, 2005). The liberation psychology perspective pays particular attention to environmental demands and contextual factors in the host society, as well as to the resources that new

settlers develop and mobilize in order to cope with the associated difficulties, and to resist and overcome oppressive conditions (García-Ramírez et al., submitted; García-Ramírez, Martínez, & Albar, 2002; Hernández-Plaza, Pozo, Alonso, & Martos, 2005; Hernández-Plaza, García-Ramírez, Herrera, Luque, & Paloma, 2009).

Taking this perspective, *wellbeing* can be understood as a state of personal and social progress brought about by the simultaneous and balanced satisfaction of personal, relational and collective needs (Martín-Baró, 1994; Nelson & Prilleltensky, 2005). We conceptualize wellbeing as an ecological and value-dependent phenomenon, strongly related with access to resources, and therefore conditioned by norms and values of social justice in the host society. Social justice can be defined as the fair and equitable allocation of burdens, resources and power in society, and it is considered an essential pre-requisite for collective, relational and personal wellbeing (Prilleltensky, 2008). The satisfaction of collective needs (sense of community, cohesion, economic security, access to health and community resources) requires social justice in terms of equitable access to public health, education, employment and other types of resources (e.g. transportation systems, opportunities for community participation, material and economic resources, etc.). Relational needs (e.g. identity, connection, acceptance, mutual responsibility) are guided by values of respect for human diversity and democratic participation in personal and social networks, based on social justice. Finally, the satisfaction of personal needs (e.g. health, protection, self-esteem) is sustained on individual values of personal growth, self-determination and the ability to pursue one's chosen goals in life, which are impossible to achieve without social justice (Nelson & Prilleltensky, 2005).

Nevertheless, for many new settler populations around the world, these ecological domains are characterized by unequal power and oppression. *Power* can be defined in terms of capacities and opportunities to achieve wellbeing (Foucault, 1979; Martín-Baró, 1994; Nelson & Prilleltensky, 2005). Some groups may use it in order to acquire privileges and establish oppressive relations with other groups, such as new settlers. *Oppression* is considered a state of domination in which the dominant group gains privileges over others, restricting their access to resources and limiting their capacity to respond (Fanon, 1963; Martín-Baró, 1994; Nelson & Prilleltensky, 2005). At the community level, oppression is based on the economic exploitation of new settlers, ethnic discrimination in the housing and labor markets, unequal access to education, health and community services, and inter-group relations based on ethnic prejudice (Hernández-Plaza, 2003; Hernández-Plaza et al., 2004; Martínez et al., 1996; Martínez-Veiga, 1997, 1999). At the relational level, oppression rests on social isolation, lack of support and conflictive social networks (Hernández-Plaza, 2003; Martínez et al., 1996; Maya, Martínez, & García-Ramírez, 1999). At the personal level, new settlers can accept and internalize the dominant narratives of cultural superiority and ethnic prejudice, with feelings of personal worthlessness, lack of control, low self-esteem, and mental health problems (García-Ramírez et al., 2005; Hernández-Plaza, 2003).

The understanding and promotion of wellbeing in new settler populations requires an examination of the acculturation processes associated with intercultural contact in the receiving context (Berry, 1997, 2005, this volume; Rudmin, 2006; Sam & Berry, 2006). Acculturation has been defined as:

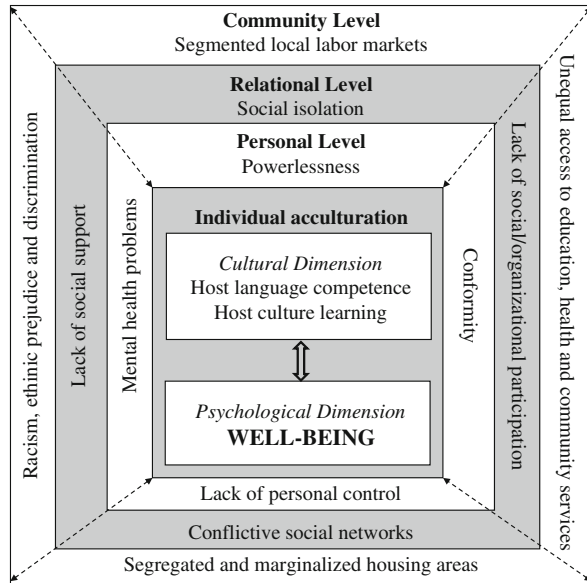
the dual process of cultural and psychological change that takes place as a result of contact between two or more cultural groups and their individual members. At the group level, it involves changes in social structures and institutions and in cultural practices. At the individual level, it involves changes in a person's behavioral repertoire (Berry, 2005, pp. 698–699).

At this latter level, two dimensions have been distinguished in the process of acculturation: a *cultural dimension*, which refers to the acquisition of culturally appropriate skills to live in the new society, and a *psychological dimension*, related with wellbeing and satisfaction with life conditions in the new context (Berry, 2005, this volume). Although some studies have shown that cultural adaptation leads to higher psychological wellbeing (Berry, Phinney, Sam, & Vedder, 2006, this volume), a considerable amount of research has described no relation between both dimensions, or even negative consequences of cultural adaptation in terms of acculturative stress, negative affect and less satisfaction with life in the receiving country (Rudmin, 2006).

Contextual differences could partly explain these inconsistencies. Despite general agreement regarding the key role of contextual factors in acculturation processes (Berry, 2005; Berry et al., 2006; Portes & Rumbaut, 1996; Sam & Berry, 2006; Rudmin, 2006), surprisingly little attention has been drawn to the ways in which the characteristics of the local community impact the adaptation process (Berry, this volume). For new settlers and ethnic minorities, local conditions may be more important than national policies or general historical and cultural circumstances, due to the more proximal impact of personal experiences with racism, stereotyping and discrimination, and opportunities for friendship and social support in specific activity settings such as the neighborhood, the workplace or the school (Phinney, Horenczyk, Liebkind, & Vedder, 2001; Verkuyten, 2000). In line with this, some investigations have shown that psychological wellbeing is influenced by the opportunities available at the local context for intergroup contact, social participation, culture learning, maintenance of own language and identity, and symmetrical power dynamics with the host population (Birman, Trickett, & Buchanan, 2005; Hernández-Plaza et al., 2009).

In accordance with recent recommendations in the field of new settlement and acculturation psychology (Asselin et al., 2006; Birman, 2008; Chirkov & Boski, 2008; Prilleltensky, 2008; Rudmin, 2006; Tseng & Yoshikawa, 2008), our approach emphasizes the need to consider the role of power dynamics and power inequities at the local context in both research and action with new settler populations. These insights have provided the foundation of our work for over a decade, examining the role of community, relational and personal factors on the wellbeing of Moroccans in Andalusia, where they are burdened with extremely asymmetrical conditions of disenfranchisement (see Fig. 12.2). The following section presents a study in which,

Fig. 12.2 A liberation psychology approach to the wellbeing of new settler populations under oppressive conditions



using hierarchical lineal modelling, we show how the relationship between cultural and psychological adaptation is moderated by contextual factors.³ After this, taking a liberation psychology approach, we summarize our research findings and discuss their implications for practice with new settler populations under oppressive conditions.

Exploring the Relationship Between Cultural Adaptation and Wellbeing in Oppressive Contexts: The Case of Moroccan New Settlers in Southern Spain

Taking into account the asymmetrical conditions faced by Moroccan new settlers in Andalusia, we conducted an investigation that explored the impact of characteristics of the local context, at the community and relational levels, on the psychological wellbeing of this population. The general assumption of positive relationships between cultural and psychological adaptation was tested, considering that oppressive conditions may reduce the opportunities for new settlers to achieve a favorable psychological adaptation in terms of wellbeing. In line with this, we expected that

³A preliminary version of this study was presented at the First Conference of Community Psychology (University of Puerto Rico, San Juan, June, 2006) included in the symposium “Integration, assimilation and acculturation: What do they really mean?” with the title “Community integration of new settlers in asymmetric contexts: the case of Moroccans in Spain”.

the relation between cultural and psychological adaptation would vary in degree and nature, depending on the specific characteristics of each particular context (Hypothesis 1).

More specifically, we expected that cultural adaptation, in terms of host language competence, would not necessarily increase psychological wellbeing, assuming that this relationship would be moderated by characteristics of the local context. The impact of two contextual factors was examined: perception of ethnic discrimination at the community level; and availability of social support at the relational level. Although there is empirical evidence about the negative consequences of ethnic prejudice and discrimination experiences on the wellbeing of new settlers at the individual level (Hernández-Plaza et al., 2005; Liebkind & Jasinskaya-Lahti, 2000; Ryff, Keyes, & Hughes, 2003; Verkuyten, 2008), few studies have examined this issue based on the local context as unit of analysis (Berry, this volume). A similar situation can be described for the positive effects of social support, widely proven at the individual level (Hernández-Plaza et al., 2005; Hovey, 2000; Hovey & Magana, 2002; Martínez, García-Ramírez, & Maya, 2001; Vohra & Adair, 2000), but to a lesser extent at the community level. In our study, we expected that host language competence would not increase psychological wellbeing in local contexts characterized by high levels of perceived ethnic discrimination (Hypothesis 2), assuming that this discrimination would be a strong barrier against opportunities to achieve wellbeing (see, UNDP, 2009), even for new settlers with high levels of host language competence. We also expected that the availability of diverse types of social support at the local context would moderate the relation between cultural and psychological adaptation (Hypothesis 3). Six types of support were examined: expression of personal feelings, social participation, positive feedback, guidance, physical assistance, and material support (Barrera, 1980).

The sample was composed of 298 Moroccan new settlers living in 12 different community contexts, including all the cities and villages with the highest presence of Moroccans at the time of the data gathering. Participants were surveyed in the 90s, when Moroccan new settlement started to become a significant and increasing phenomenon in Andalusia. Regression analyses were conducted in order to explore the relation between language competence, as an indicator of cultural adaptation, and satisfaction of life, as an indicator of psychological adaptation, throughout the total sample. Results showed that cultural adaptation favored psychological adaptation ($\beta = 0.442, p = 0.00154, r^2 = 0.02573$). Regression equations linking language competence and life satisfaction for each location are depicted in Fig. 12.3. In accordance with Hypothesis 1, results showed that a certain degree of host language competence did not guarantee an equivalent degree of satisfaction with life in all the local contexts under study. For instance, locations such as Granada showed no effect, while there was a very positive effect in some locations (e.g. Sanlúcar, Cádiz), or even a negative effect in others (e.g. Níjar, Almería).

Taking into account these preliminary results, data were analyzed using Hierarchical Linear Modeling. HLM is an extension of regression models that constitutes a useful and powerful tool for capturing contextual variability in community research (Luke, 2005). It tests for links between variables across different

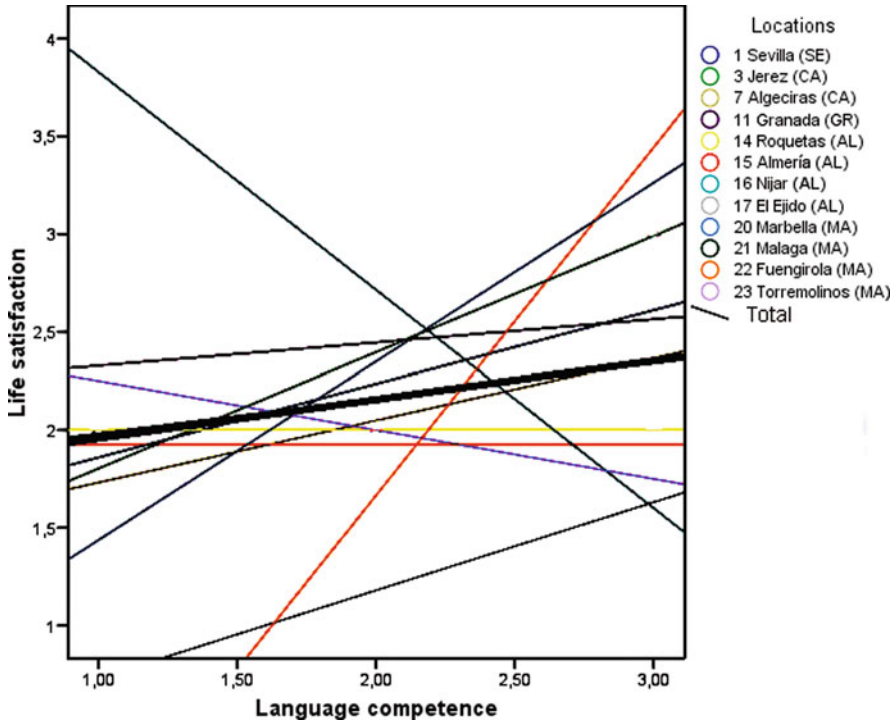


Fig. 12.3 Relationship between cultural adaptation and life satisfaction by locations

levels of analysis, including for example individuals, organizations and communities, instead of simply within them. HLM therefore assumes a multi-level structure of the real world, enabling for example the prediction of individual variables from contextual characteristics, and vice-versa. The first step in our analysis was a fully unconditional two-level HLM that yielded preliminary information about satisfaction with life in different locations. The component of variance among contexts had a significantly high value of 0.11566, showing clear contextual differences when psychological adaptation was considered. Then, we had to test contextual variables which moderate the relation between $(Satisfaction)_{ij} = \beta_{0j} + \beta_{1j}(\text{language})_{ij} + e_{ij}$ host language competence and life satisfaction; in other words, which variables modify the slopes associated with the different regression lines. The first-level regression model was⁴:

⁴Equation similar to a typical OLS (ordinary least square) multiple regression, except for the j subscripts, that express a different model for each of the j second-level units (local contexts). Each local context has a different intercept and slope. Intercepts inform about the average life satisfaction in each local context for those people without any host language competence. Slopes show the effect of language on satisfaction.

The second-level variables were⁵:

$$\beta_{0j} = \gamma_{00} + u_{0j}$$

$$\beta_{1j} = \gamma_{10} + \gamma_{11}(\text{rejection})_j + \gamma_{12}(\text{emotional})_j + \gamma_{13}(\text{material})_j + \gamma_{14}(\text{guide})_j + \gamma_{15}(\text{feedback})_j + \gamma_{16}(\text{instrumental})_j + \gamma_{17}(\text{participation})_j + u_{1j}$$

Table 12.1 depicts the significant coefficients of the variables: perceived ethnic discrimination, positive feedback and social participation. In accordance with Hypothesis 2, a greater perception of discrimination led to language competency having less effect on satisfaction with life. When the level of perceived discrimination was substantial, the investment in cultural adaptation did not lead to greater psychological adaptation; indeed the relation may even be reversed (Berry, this volume). Regarding social relationships (Hypothesis 3), results showed significant coefficients for two different types of support: positive feedback and social participation. Feedback, typically obtained from compatriots, had a negative valence, meaning that the greater the availability of such feedback, the less positive influence had linguistic competence on life satisfaction. In contrast, the positive valence

Table 12.1 Two-level linear regression of life satisfaction (psychological adaptation) on host language competence (cultural adaptation), adding community context explanatory variables

Fixed effect	γ	Standard error	t	df	p
For Intercept1, β_0					
Intercept2, γ_{00}	1.275	0.3299	3.86	15	0.002
For Language slope, β_1					
Intercept, γ_{10}	1.095	0.3798	2.88	8	0.021
Discrimination,	- 0.386	0.0098	-3.90	8	0.005
Emotional support	- 0.178	0.1233	-1.44	8	0.186
Material support	0.061	0.1436	0.42	8	0.682
Guidance	0.146	0.1576	0.93	8	0.380
Feedback	- 0.189	0.0623	-3.03	8	0.017
Physical assistance	- 0.011	0.1560	- 0.07	8	0.944
Social participation	0.226	0.0660	3.43	8	0.010
Random effect	Standard deviation	Variance component	df	χ^2	P
Intercept, μ_0	0.729	0.531	14	30.25	0.000
Language slope, μ_1	0.480	0.231	7	32.38	0.000
Level-1, R	0.907	0.823			

⁵Given that we were mainly interested in identifying which variables of the local context explained the effect of speaking host language on life satisfaction, we dealt with the slopes, keeping the intercept fixed, with the random component due to contexts (u_{0j}); and create a new regression model where β_{1j} is the outcome variable, and the independent variables are the local context variables under study. Both equations β_{0j} and β_{1j} constitute the second-level variables. Then, we incorporated this second-level part into the first-level equation and solve the equation system.

of social participation demonstrated that the greater the availability of this type of support, the more positive effect had linguistic competence on life satisfaction.

Local contexts characterized by high levels of perceived discrimination may offer few opportunities for new settlers to improve their living conditions and achieve wellbeing, considering that ethnic discrimination may be a strong barrier for positive contact with the native population, and symmetrical access to employment, housing and community resources (Hernández-Plaza, 2003; Martínez et al., 1996). As a consequence, at these local contexts cultural adaptation does not necessarily lead to wellbeing. Under those circumstances, new settlers seem to obtain more positive experiences from contact with compatriots, using separation as a strategy to avoid the negative experiences associated with oppressive conditions (Berry, this volume). Social networks mainly composed by co-ethnics may have beneficial effects on new settlers' wellbeing, playing a key role as a source of opportunities for social participation and positive social interactions (Hernández-Plaza et al., 2005; Martínez et al., 1996). However, they may also have negative consequences due to interpersonal conflicts, family pressures, emotional overload and limited opportunities for host culture learning (Maya et al., 1999).

A Liberation Psychology Approach to the Wellbeing of Moroccan New settlers in Southern Spain: Lessons Learned

In line with the previous study, in this section we examine some of the factors involved in the psychological adaptation and wellbeing of new settler populations under oppressive local conditions, emphasizing the role of contextual factors and power dynamics in the community, relational and personal domains. Taking a liberation psychology perspective, and based on the framework proposed by Prilleltensky, Perkins, and Fisher (2003), we revise our investigations and redefine the results obtained in terms of power and oppression dynamics, examining the impact of marginalization and social exclusion on the wellbeing of Moroccan new settlers in southern Spain.

Community Level

At the community level, oppression relies on the utilization of material, economic, legal and ideological barriers by dominant groups in order to gain privileges (Prilleltensky, 2003). In this ecological domain, key factors involved in the wellbeing of new settler populations are the opportunities and barriers associated with access to the labor and housing markets; access to community resources and formal social support; and orientation of the host population towards new settlers and cultural diversity. In this section, we examine the role of these community level factors on wellbeing.

The asymmetrical distribution of power through segmented *local labor markets*, that locate new settlers in the most precarious positions, and segmented *local housing markets*, that locate them in segregated and marginalized areas with limited

access to community resources, influence wellbeing by creating a structure of opportunities that limits new settlers' access to economic, material and psychosocial resources (Asselin et al., 2006; Portes & Rumbaut, 1996; Soon & Fisher, 2005). One of the most extreme examples of the oppressive conditions suffered by Moroccan new settlers is the case of Almería, an Andalusian province located on the Spanish southern coast, which has experienced huge economic, demographic and social changes during the last decades, due to the rapid development of intensive greenhouse agriculture, the most important basis of the local economy. Economic research has demonstrated that the success of this intensive productive system has depended, to a great extent, on the availability of an abundant and flexible labor force, able to accept extremely precarious working conditions (Aznar & Sánchez, 2001). This labor force has been mostly composed of new settlers coming from diverse parts of the world. It is the particular case of Moroccans, who work almost exclusively in the intensive greenhouse agriculture, with scarce opportunities to find a job in another sector, regardless of their level of education or professional experience (Hernández Plaza, 2003; Hernández-Plaza et al., 2004; Martínez et al., 1996). Their working conditions in this sector are extremely precarious in terms of low salaries, long working hours, instability, high temperatures, hard work, exposure to nocive chemical products, and legal instability due to the lack of labor contracts (see Table 12.2). Most Moroccans live in sub-standard housing such as warehouses, garages or shanties called *cortijos*, often made of plastic, many of them without electricity and running water. These sub-standard houses are often located outside the towns, in the greenhouse areas where most of them work (Hernández-Plaza, 2003; Hernández-Plaza et al., 2004; Martínez et al., 1996; Martínez-Veiga, 1997, 1999).

Table 12.2 Working and living conditions of Moroccan new settlers in Almería (Hernández-Plaza et al., 2004)

Working and living conditions	Percentage of the total sample
Working conditions	
Type of contract	
Permanent	0
Temporary, full time	20.6
Temporary, part time	1.1
Working without contract	78.3
Working hours (per day)	
Less than eight	3.1
Eight	41.7
More than eight	55.2
Job stability (months with a job per year)	
0 months	4
1–4 months	16
5–8 months	50
9–12 months	30
Housing	
Type of housing	
House or flat	25
Semi-demolished house	22
Shanty (" <i>cortijo</i> ")	42

Table 12.2 (continued)

Working and living conditions	Percentage of the total sample
Warehouse, garage	9
Homeless	2
Housing conditions	
Without running water	42.9
Without hot water	57.1
Without electricity	23.5
Without bathroom	50
Without shower	52
Without refrigerator	41.8
Housing access	
Very easy	0
Rather easy	1
Neither easy nor difficult	2
Rather difficult	3
Very difficult	94
Location	
In the centre of the town	5.1
In urban areas, outside the centre	19.4
In the outer suburbs	15.3
Out of urban areas, in greenhouse areas	60.1
Legal situation	
Legal condition	
With residence permit	60
Without residence permit	40
Type of residence permit	
Temporary, 1 year	55.4
Temporary, 3 years	35.7
Permanent	1.8
Family re-grouping	1.8
Married with a Spanish citizen	5.4
Perceived ethnic prejudice	
No prejudice	2
Very little prejudice	0
Little prejudice	5
Indifferent	11
Some prejudice	12
A lot of prejudice	14
Totally rejected	56

N = 100

Note: This table has been extracted from a needs assessment conducted by the first author. A detailed description of this needs assessment can be found in Hernández-Plaza et al., (2004).

Research conducted with Moroccan new settlers in Andalusia, using both qualitative and quantitative methodology (mainly qualitative interviews, focus groups, structured interviews and surveys), has shown that precarious working and living conditions are related to negative consequences across diverse ecological domains

(see also, Carr, Chapter 7 this volume; Maynard et al., this volume; Podsiadlowski & Ward, this volume).

At the personal level, they have been found to be associated with difficulties for the acquisition of the host language (Hernández-Plaza, 2003); scarce opportunities for integration (Berry, this volume) as a psychological acculturation strategy (Hernández-Plaza et al., 2009); low professional self-concept and passive job search styles (García-Ramírez et al., 2005); physical health problems (Hernández-Plaza, 2003; Hernández-Plaza et al., 2009); high levels of depression (Martínez et al., 2001); and extremely low levels of psychological wellbeing in terms of life satisfaction (Hernández-Plaza, 2003; Hernández-Plaza et al., 2009).

At the relational level, they are related with reduced and insufficient social support networks (García-Ramírez et al., 2002; Martínez et al., 2001); scarce opportunities for social support provision among family members due to problems for family regrouping (Hernández-Plaza, 2003); limited opportunities for contact with natives and scarce presence of host society members as sources of informal social support (Hernández-Plaza, 2003; Hernández-Plaza et al., 2005, 2009; Martínez et al., 1996); and lack of social participation in the receiving society (Hernández-Plaza, 2003; Martínez et al., 1996).

At the community level, they are associated with negative attitudes towards new settlers and increased ethnic prejudice among the host population due to perceived threats associated with marginalization and social exclusion (Hernández-Plaza, 2003). Precarious working and living conditions are also related with problems of *accessibility to community resources* such as education, health services and *formal social support* provided by social workers, social mediators and other social intervention professionals, as a result of: (i) incompatibility with working hours; (ii) social and spatial exclusion in segregated neighborhoods with scarce community resources, or isolated rural areas with no public transport facilities; (iii) lack of basic resources such as running water or electricity, that make it difficult to attend Spanish courses or use other formal resources after work, due to the impossibility of maintaining adequate hygienic conditions; and (iv) lack of confidence, particularly in the case of illegal new settlers (Hernández-Plaza, 2003; Hernández-Plaza et al., 2004; Martínez et al., 1996). In line with these difficulties, a marked underutilization of formal social resources has been described in the Moroccan population, which contrasts with the extreme severity of their needs (Hernández-Plaza et al., 2004; Martínez et al., 1996).

Other barriers that may explain this reduced utilization of formal resources are: (i) language difficulties; (ii) perception of ethnic prejudice and lack of cultural competence in social intervention professionals; (iii) insufficient knowledge about available programs and services; (iv) low perceived efficacy; (v) authority, lack of reciprocity and unequal power in the relation between new settlers and social intervention professionals; and (vi) bureaucratization and problems in creating an appropriate climate for the expression of needs and the understanding of new settlers' perceptions and experiences (Hernández-Plaza et al., 2004; Hernández-Plaza, Alonso, & Pozo, 2006; Martínez et al., 1996).

One of the contextual factors that has received the most attention in the field of new settlement and acculturation psychology is the one related with the *attitudes of the receiving society towards new settlers and cultural diversity*. Diverse authors and theoretical conceptualizations have emphasized that positive cultural and psychological adaptation can only be successfully achieved in host contexts characterized by a multicultural ideology, low levels of prejudice, and positive mutual attitudes among ethno-cultural groups (Berry, 2005; Birman et al., 2005; Portes & Rumbaut, 1996). Ideology and attitudes towards new settlers and cultural pluralism are strongly related with power dynamics involved in intergroup relations. Discourses of racism, ethnic prejudice and discrimination contribute to sustain, justify, legitimate and promote intergroup relations characterized by asymmetrical power, dominance and oppression (Van Dijk, 1996; Wetherell & Potter, 1993). Based on this assumption, local community contexts characterized by asymmetrical power relations between new settlers and the host population are expected to show high levels of ethnic prejudice and discrimination that maintain, justify and strengthen ethnic segregation, marginalization and social exclusion of new settler populations.

Moroccans are the most rejected new settler group in Andalusia (Hernández-Plaza, 2003; Martínez et al., 1996), where negative attitudes towards this population are characterized by extreme manifestations of hostility, hate and explicit rejection (Reboloso, Hernández-Plaza, & Cantón, 2001). Perceptions of threat are a central element in discourses of ethnic prejudice towards Moroccans, strongly related with the illegal situation of many of them, and their precarious living conditions in marginalized areas (Hernández-Plaza, 2003). In accordance with this, Moroccans have reported high levels of perceived ethnic prejudice (Hernández-Plaza, 2003; Martínez et al., 1996), particularly in certain areas such as Almería, where this perception of rejection has been related with a reduction of the protective effects associated with social support and low levels of subjective wellbeing (Hernández-Plaza et al., 2005), and a decrease in the benefits of host language competence, as it was shown in the study previously described in this chapter.

Relational Level

In this section, the role of interpersonal networks, social support and organizational participation will be examined, emphasizing the impact of relational level factors on the wellbeing of new settler populations. There is wide empirical evidence about the positive effects of *interpersonal relationships and social support* on health and wellbeing, both in general populations (Cohen, Underwood, & Gottlieb, 2000; House, Umberson, & Landis, 1988) and in the particular case of new settlers (Hovey, 2000; Hovey & Magana, 2002; Vohra & Adair, 2000). From an ecological perspective, interpersonal networks and social support are conceptualized as complex dynamic structures and processes, which evolve and change depending on the availability of opportunities for social interaction and support at the settlement context (García-Ramírez et al., 2002; Hernández et al., 2005; Vaux, 1990). In Andalusia,

the precarious living and working conditions of Moroccan new settlers often lead to limited opportunities for contact with the host population in the neighborhood and the workplace, and lack of social participation in the receiving society. Moreover, perceptions of rejection associated with ethnic prejudice and discrimination often generate feelings of fear and avoidance of contact with the local population. In accordance with this, qualitative and quantitative investigations with this new settler group have shown a predominance of social support networks mainly composed by co-ethnics, and a very scarce presence of host society members as sources of support (Hernández-Plaza, 2003, 2005; Martínez et al., 1996, 2001).

In opposition to this predominant pattern, the presence of both natives and co-ethnics in new settlers' social networks seems to be a necessary condition for their cultural and psychological adaptation (Hernández-Plaza et al., 2005, 2009; Martínez et al., 1996, 2001). On the one hand, natives are essential sources of information about the receiving society (e.g., employment and housing opportunities, sociocultural norms and values, etc.), provide opportunities for host language acquisition and culture learning, and facilitate the development of a sense of belonging to the receiving context, avoiding feelings of segregation and marginalization through social participation. On the other hand, co-ethnics are a fundamental source of multiple types of resources (e.g., material support, information and advice, emotional support, instrumental aid, etc.) during all the stages of the new settlement experience, and play a key role in the maintenance of a positive ethnic identity. Moreover, social networks play a key role in collective experiences of resistance to oppressive power relationships, allowing new settlers to gain control over their lives, build personal and collective resources for self-determination and collective empowerment, and gain capacities to respond as active agents of community change for the promotion of collective wellbeing (García-Ramírez et al., submitted; Hernández-Plaza et al., 2009; Paloma, García-Ramírez, De la Mata, & Association Amal-Andaluza, 2009; Soon & Green, 2006).

Although most research has emphasized the positive, protective and strengthening role of social networks, they may also have important debilitating effects, particularly under oppressive conditions. Structural (e.g. high ethnic density, excess or lack of family contact) and functional characteristics of informal social support systems (e.g. family pressures, overload, conflicted relationships, tolerance of violence) have been shown to play a negative, debilitating role, increasing personal and social vulnerability, and reducing wellbeing (Hernández-Plaza, 2003; Martínez et al., 2001; Maya et al., 1999). Social networks with high density of compatriots and family members can play a key supportive role for newcomers, but they also have negative effects in the short and long term, impeding the host language acquisition, the insertion in non-ethnic employment sites, and the achievement of integration as psychological acculturation strategy (Hernández-Plaza, 2003, 2009; García-Ramírez et al., 2005). Debilitating effects can also be observed in social networks with a scarce presence of compatriots, such as loss of cultural identity or reduced protective potential, due to the lack of close ties and emotional support (García-Ramírez et al., 2002). Contrasting positive and negative effects of social support were also identified in the study described previously in this chapter,

where social participation was shown to increase the positive effect of host language competence on life satisfaction, while an opposite pattern was found for feedback obtained in interpersonal contacts, mainly with co-ethnics.

In this ecological domain, *organizational participation* is another essential requirement for new settlers' wellbeing in contexts of asymmetrical power relations (UNDP, 2009). Involvement in organizations such as labor unions, community associations in the neighborhood, new settler associations, and other types of organizations plays a key role in the promotion of collective wellbeing through the empowerment of oppressed new settler groups, the development of resistance movements, and community social action oriented to achieve a more equitable distribution of power and resources (Hernández-Plaza et al., 2006, 2009; Paloma et al., 2009).

Personal Level

Oppressive conditions have been associated with psychological dynamics of subordination that interiorize disadvantaged positions in asymmetrical power relations, through a lack of personal control, attitudes of conformity, fear, obedience to authority and violence tolerance (Martín-Baró, 1994; Prilleltensky, 2008). All these elements are included in the concept of *powerlessness*, referring to the psychological dynamics involved in conditions of permanent power inferiority, where individuals and groups accept their disadvantaged position, becoming passive and incapable of making decisions and initiating actions oriented to change asymmetrical power relations. This way, powerlessness contributes to perpetuate oppressive conditions, marginalization and social exclusion, usually leading to illness and lack of wellbeing (Prilleltensky, 2008). A clear expression of powerlessness in the Moroccan population is the low level of organizational participation reported by this new settler group in Andalusia. Extremely low levels of participation have been observed in diverse types of organizations such as trade unions, new settler associations and other community organizations, particularly in leadership and active participation roles (Hernández-Plaza, 2003; Martínez et al., 1996).

Socio-political control represents the opposite psychological dynamics, defined by the belief in one's abilities to participate in collective actions, influence community and political decisions, assume leadership roles, organize community members and promote effective changes in the social and political systems (Zimmerman & Zahniser, 1991). Under oppressive conditions, socio-political control may play a key role in the promotion of collective wellbeing and social justice, through the active involvement of new settlers in resistance movements and community social actions (UNDP, 2009, pp. 61, 101).

The cultural and psychological adaptation of new settlers has also been related with other individual-level factors. According to Kosic (2006), these factors may be classified into two broad categories: (i) self-orientation factors, referred to the experience of reflexive consciousness by which an individual is aware of the self, his/her personality and identity (e.g., self-esteem, motivation, coping strategies,

anxiety, need for cognitive closure, locus of control); and (ii) others-orientation factors, which include skills and attributes that assist in the development and maintenance of relationships and effective communication in the receiving context (e.g. self-monitoring, extraversion, social skills). Research in this field has provided inconsistent findings on the relationship between personal factors and psychological adjustment (Kosic, 2006), possibly due to the embeddedness of the individual into broader relational and community structures that play a key role in the conformation of new settlers' self and identity (García-Ramírez et al., submitted), and determine their capacities and opportunities to achieve wellbeing.

Implications for Practice and Directions for Future Research

In this chapter, we have emphasized the need to explicitly examine the role of power and oppression dynamics in the analysis and promotion of wellbeing in new settler populations. Since the initial stages of the mobility process, the decision to leave the home country often takes place in contexts characterized by limited opportunities to achieve even minimum levels of wellbeing, under conditions of social inequalities, dictatorship and violation of human rights (Ager & Ager, this volume; also Miller, this volume). Although receiving countries usually offer better conditions to attain wellbeing, the incorporation of new settler populations is often produced under clearly disadvantaged conditions. Acculturation processes, and the associated cultural and psychological adaptation, are embedded in dynamics of power and oppression, domination and subordination, privileges and resistance. In consequence, failure to examine the role of power and oppression in the relation between new settler populations and the host society leads to theory and practice that contribute to maintain the *status quo*, often characterized by asymmetrical inter-group relations and lack of social justice (Carr, Chapter 7 this volume).

In opposition to power-blind theorization, research and practice, the perspective of liberation psychology is proposed as a necessary and innovative framework for the analysis and promotion of wellbeing in new settler populations. Taking this perspective, the need to examine power dynamics at multiple ecological domains is another recommendation for future research and practice oriented to promote the wellbeing of new settler populations. Failure to think and practice ecologically reproduces the dominant culture's emphasis on individualism and encourages the tendency to engage in "victim blaming" (Nelson & Prilleltensky, 2005). As psychologists dealing with problems beyond the individual, we need to de-psychologize psychology in order to work in different and more effective ways (Fisher & Soon, 2007; Smail, 2001).

A liberation psychology approach allows us to propose the following recommendations for practice with new settler populations under oppressive conditions: (i) emphasis on multilevel actions that take into account and connect all the ecological domains involved in wellbeing; (ii) emphasis on practices that promote the individual and collective empowerment of disadvantaged groups; and (iii) emphasis

on participative action-research and the use of community coalitions, as means to increase the applicability and relevance of acquired knowledge to the real practice of new settlers' wellbeing.

From an ecological approach, practice oriented to promote new settlers' wellbeing should be necessarily based on multi-level actions and interdisciplinary work. This has been the core of community psychology practice with disadvantaged groups (Nelson and Prilleltensky, 2005). Taking, for instance, the case of practice in the field of physical and mental health with new settlers, it should necessarily be linked with issues of social justice and citizenship rights for new settlers, that guarantee equal access to health care and other community services (Ingleby, Chimenti, Hatziprokopiou, Ormond, & De Freitas, 2005). It should also be linked with actions oriented to reduce risk factors associated with the working and living conditions of new settlers, often in unhealthy environments (e.g. greenhouse areas with frequent use of chemical products), under conditions of isolation and lack of social support. Moreover, it would require actions oriented to reduce the barriers that often impede new settlers' access to health and community services, such as lack of knowledge, mistrust, language barriers, fear of being deported (in the case of undocumented new settlers), cultural barriers and perceptions of prejudice in health and social care professionals (Hernández-Plaza et al., 2006; Ingleby et al., 2005), usually related with oppressive working and living conditions.

Practice with new settler populations should also include an explicit analysis of the role of power and oppression in the problems under consideration, and should emphasize actions that encourage the individual and collective empowerment of disadvantaged groups. In line with this, the promotion of grassroots new settler organizations, as empowerment community settings, has shown to be a useful and necessary tool to bridge newcomers and the receiving society, their structures, resources and services, giving new settlers their own voice to resist and overcome oppression (Paloma et al., 2009; UNDP, 2009, p. 61). Participation in these associations promotes community development, encourages sense of community and positive identity, favors mutual help and the development of supportive networks, increases sense of control and reduces feelings of powerlessness (Maton, 2008; Paloma et al., 2009; Wandersman & Florin, 2000). Therefore, grassroots associations can play a key role in the promotion of changes in all the ecological domains, at the community, relational and personal level. Individual and collective empowerment should be the core of practice with new settler populations under oppressive conditions, oriented to change unequal structures, and strengthen citizenship and social justice (UNDP, 2009).

Recent criticisms in the field of new settlement and acculturation psychology have questioned the applicability of acquired knowledge to the real practice of new settlers' wellbeing (Birman, 2008; Chirkov & Boski, 2008; Rudmin, 2006). From a liberation psychology approach, we suggest an emphasis on participative action-research and the use of community coalitions in research and practice with new settler populations. Community coalitions are usually composed of researchers, key community members and practitioners (health care professionals, social workers, etc.), who work together collaboratively in order to carry out community-oriented

research aimed at understanding, denouncing and transforming situations of social injustice and oppression (see <http://ctb.ku.edu> for examples). The authors are now involved in the community coalition “CESPYD” (Coalition for the Study of Health, Power and Diversity), composed of an interdisciplinary group of researchers, key members of the Moroccan community in Andalusia (community activists and members of new settler grassroots organizations), and practitioners (health care professionals, social workers and volunteers in NGOs) that has begun to show positive outcomes in terms of individual and collective empowerment of the Moroccan community (see Paloma et al., 2009, for more details).

In conclusion, we suggest the incorporation of the liberation psychology perspective in current agendas on new settlement and acculturation research and practice, emphasizing the need to examine power and oppression dynamics at diverse ecological levels. Assuming that social research and practice are not value-free, our proposal is explicitly based on values of social justice and human diversity as necessary conditions for personal, relational and collective wellbeing.

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Part IV

Performance

Chapter 13

Mobility and Careers

Kerr Inkson and Kaye Thorn

Abstract A career has been defined as “the evolving sequence of a person’s work experiences over time”. In this chapter we argue that the time-based nature of careers, and their longevity, make mobility inevitable, and a key characteristic of careers. Careers are most commonly metaphorized as “journeys”, which have both physical and psychological elements. Careers make transitions between jobs, organizations, occupations, industries and locations, thus defining multiple dimensions through which careers move. This mobility is typically the result of the interplay, and often conflict, between institutional and individual forces. Attention has been focused in recent times on “boundary-less careers” unfolding across multiple settings due to more open, flexible institutional structures and increased personal agency, particularly among professional workers with in-demand skills. One way of understanding career mobility is through the concept of “career capital”, the motivation, expertise and network connections that individuals accumulate through their career engagements, which make the career a repository of knowledge that can be used to cross-pollinate the organizations that receive these mobile careerists. The issue of geographical career mobility is neglected in career studies, and we note some of the dynamics involved in temporary self-expatriation, permanent new settlement, and career “globe-trotting”, illustrating with case examples, and noting particularly the benefits and drawbacks of mobile careers to those involved. Focusing on the issue of “talent flow”, in which individual mobile careers coalesce into international currents of expertise and economic potential, we consider evidence from the country of New Zealand as a case in point. Finally, we note likely future economic and social stimuli for, and constraints on, career mobility, and argue for more and better research.

Keywords Careers · Mobility · Career capital

Abbreviations

OE Overseas Experience

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Mobile and Immobile Careers

Henry Wilson lived his life in Aberdeen, Scotland. He was born in 1880 and did well in school. When he was eleven, his father took him to an accounting firm in Golden Square, Aberdeen, and had him employed as an office boy. With quill pen, ink bottles and handwritten ledgers Henry progressed, to accounts clerk and ledger clerk. He married, and had three children. When the First World War broke out, he volunteered for active service but was too old to serve. He became senior clerk, a trusted company servant. He was thrifty, and was able to buy his own house, within 5 min walk of Golden Square. In the Depression, his wages were reduced, but there was never any question that he would lose his job. Eventually things got better. The Second World War came and went. By now the firm had progressed to using typewriters and adding machines. In 1951, Henry retired aged 70. He had spent nearly 60 years working in the same office. Within a year of retirement, he died. *Source: Inkson, 2007*

Henry's career was largely, though not totally, immobile. He stayed in the same country, in the same city, in the same occupation, in the same organization, in the same building, in the same office. He moved house, but stayed in the same part of town. The only things that changed were his job description, the technology he used, his salary and his status. Henry's was a classically immobile career, its static quality cemented by an invisible but immensely strong bond of loyalty between Henry and the firm that employed him. Few careers nowadays have such a sense of endurance and timelessness.

Compare Henry Wilson with one of today's mobile professionals. . . .

Peter Harrison was born in Wellington, New Zealand, in 1946. He completed secondary school and decided to combine part-time university study with extensive travel throughout New Zealand. In 1968, he headed offshore, venturing first to Australia, and then Cape Town, from where he journeyed across Africa, eventually reaching Europe in mid-1969. For the next decade, Peter explored the United Kingdom and Ireland, working as a teacher, milking cows, and sorting potatoes, and then onto the "hippy trail" to India, working only to earn enough money to eat and keep travelling. By 1978, the job situation had tightened and Peter returned to New Zealand to complete his degree and begin his new career, not as a traveller and part-time employee, but as a full-time teacher. He returned to the UK in 1986 to fill various teaching vacancies in London, Oxford and Scotland. He also married and had a daughter. In 1995, he moved into international education, and taught successively in Russia, Dubai, Poland and Romania, and then onto Yemen and Sudan before

returning to Russia. As an expansion to this career, he also undertook literary research for numerous publications. By 2008, he reached the milestone of 40 years since leaving New Zealand, which prompted the question as to whether he would remain abroad forever, or return to New Zealand to retire. This question, to date, remains unresolved.

Peter's career was geographically extremely mobile, and in its early stages was also mobile in terms of occupational transitions. Even when established as a teacher, Peter made major geographical transitions around Eastern Europe and Africa, and extended his work from teaching into research. Few careers are as mobile as Peter's, and it isn't surprising if he now has difficulty in defining where his "home" is in his retirement years.

No doubt the difference between Henry Wilson's career and Peter Harrison's can be partly explained by changing times. In Henry Wilson's time, many people would have had their careers bounded, as his was, first by a particular town or locality defined as "home". Peter Harrison, commencing his working life two generations later, found himself living in an era, and in a country, where extensive travel had become both more possible and more common. And while the extent of Peter's wanderlust was probably unusual for his time, there is evidence that in the early twenty first century, as Peter winds his career down, more and more people are directing their careers beyond previous boundaries of location, organization, industry and occupation. Thus, the image of the term "career" is changed from something solid, stable, predictable and locatable, to something that may instead be ephemeral, dynamic, unpredictable and mobile. How has this come about, and what are the implications for today's and tomorrow's careerists, for the organizations in which they work, and for the societies in which they live?

Elements of Career Studies

Career has been defined as "the evolving sequence of a person's work experiences over time" (Arthur, Hall, & Lawrence, 1989, p. 8). On the basis of such a definition, each person has only one career, the career process is evolutionary, and the career is focused on work (and therefore in most cases on employment), but takes non-work experiences into account. The time-based nature of careers, and their longevity, make mobility inevitable, and a key characteristic of careers. And provided one makes a suitably eclectic definition of mobility, one finds that much of career studies is concerned with understanding, predicting, and normalizing career mobility, both its extent and its direction.

The applicability of the notion of mobility to careers is well demonstrated by the fact that the most common choice of career metaphor, by career theorists and the public alike, is that of the career as a "journey". Career journeys are shaped both by the nature of the terrain through which travelers pass, and by their own inclinations,

goals and abilities. However, the dimensions through which they move are many and varied. Some are shown in the cases above.

An initial issue is whether internal, or psychological, mobility – represented by such metaphors as “going outside my comfort zone” – needs to be considered. A distinction informing career theory and research since its beginnings (Arthur, Khapova, & Wilderom, 2005; Hughes, 1937) has been that between “objective” and “subjective” careers. As objective entities which can be assessed from the outside, for example by observation of the occupation a person pursues, the organization s/he works for, and the salary and status s/he obtains: This is typically the public view of careers that members of the public normally accept. However, those who study careers assert that the subjective career – the career actor’s internal perceptions of, and feelings about, the career – are equally important (Sullivan & Arthur, 2006). If this is the case, then a career is a journey directed toward both external and internal goals, and mobility toward such goals as “psychological success” (Mirvis & Hall, 1994) is important. In the context of this book, however, we will be considering mainly the objective career and dimensions of external mobility, which is so much more easily observed, even if in some cases it is based on psychological sources.

Career Transitions

Mobility in careers tends to be focused on career transitions. That is, most careers consist of a sequence of work-related roles. While changes (and indeed mobility) may take place, initiated by either the organization or the individual, in the nature of the work undertaken within the role, the greatest change is likely to take place during a transition between roles – when an individual gives up his or her current job and moves to another job, possibly in a new organization, occupation, industry, locality, or country. Societal and organizational forces, such as changing labor markets or organizational restructuring, may dictate such transitions, or alternatively, career actors may seek them as part of their self-engineered career development. Either way, they will be facilitated at the individual level, as part of the subjective career, in a psychological process of adjustment.

Careers are frequently characterized metaphorically, as journeys of different types (Inkson, 2007). The influence of career transitions on the journey metaphor of careers is that the “journey” traveled in the objective career may seem a somewhat “jerky” one, characterized by long periods spent apparently immobile (for example occupying a single job for, say, 5 years), punctuated by sudden, rapid movements (for example to a new job in a new organization and location). However, recognition that careers are subjective as well as objective enables us to note that external mobility is often the result of a more continuous internal process.

Nicholson (1984) outlined a four-stage process that individuals typically go through in making their transitions. The four stages are preparation, encounter, adjustment and stabilization. Considering the last three of these stages in relation to travelers across cultures, Hofstede (2001) noted that the first encounter is often

accompanied by an initial period of euphoria, which is followed by a period of “culture shock” when cultural differences and other negative factors make their mark (Furnham, this volume). The third phase in Hofstede’s model is acculturation (Berry, this volume), when the individual gradually learns, by experience, how to function in the new environment. In the final stage, a stable state is reached, which may be positive, neutral or negative, and which will in turn set conditions for further transitions (Carr, Chapter 1 this volume). Individuals pursuing boundary-less careers experience major role transitions as a key feature of their lives, and often find such changes enjoyable and energizing, especially if they have high adaptability (Ebberwein, Krieschok, Ulven, & Prosser, 2004).

Dimensions of Career Mobility

Apart from interest in the “organizational” career literature, in the internationalization of managerial, usually organizational, careers (Brett & Strohm, 1995; Dickmann, Doherty, Mills, & Brewster, 2008; Suutari & Brewster, 2000), geographical mobility has not been a preoccupation of career studies. Rather, theorists have proposed, either implicitly or explicitly, that career journeys move along other “social” dimensions, and various “maps” have been proposed along which careers may move: for example, Gottfredson (1981) proposed a chart which had “prestige level” along its vertical axis, and masculinity-femininity along its horizontal axis. Any occupation could notionally be placed on the map according to its characteristics, with “engineer”, for example, being high status-masculine, “construction worker” low status-masculine, and “secretary” medium-status feminine.

A major stream of research has been concerned with occupational choice, with the positions of occupations being charted against psychological variables such as vocational interests. Holland (1997), for example, divided all occupations into groups according to the extent of the career actor’s interests in six areas: realistic, investigative, artistic, social, enterprising and conventional. The implication of the research was that career actors should find an occupation, or group of occupations, that is a fit with their interests and abilities, and should then restrict their mobility to that part of the occupational map.

In such geographies of careers, the notion of occupational space is obviously important, not least because occupation is a major determinant of social class (Goldthorpe, Llewellyn, & Payne, 1980). Other theory and research from a vocational psychological tradition focuses on the decision making processes that career actors use to determine their choice of job (e.g. Lent, Brown, & Hackett, 1994); again, mobility is notionally mapped in “occupational” space, and there is a focus on the transitions in which the career actor demonstrates mobility – between different employment states (such as employment to self-employment), different jobs, different occupations, or different statuses.

A different tack is however taken by “career management” theorists (e. g. Baruch, 2003), who study careers as sub-systems within the organizational systems of

human resources through which goods and services are produced. Here, there was an early enthusiasm for “organizational careers” through which business organizations could engineer their members’ intra-organizational mobility to the mutual benefit of organization and employee. Schein (1978), for example, conceptualized formal organizations as inverted conical structures through which members could move vertically, laterally, or between periphery and centre. Within such organizations, personal career planning and implementation could interact symbiotically with the company’s human resource management activities directed at corporate performance, thus benefiting the individual’s career and at the same time facilitating the organization’s achievement of its strategic goals. In this view, mobility takes place within organizations and along dimensions defined by the organization’s structure. In geographically expansive organizations, this may include geographical mobility.

Boundary-Less Careers

More recently, helped by the trend of restructuring of organizations to be more decentralized, specialized, and flexible, has come a recognition – extending in some places to claims that the organizational career is dead (Hall, 1996) – of the growing importance of what has been called the “boundaryless career” (Arthur & Rousseau, 1996). According to these authors, “boundaryless careers are the opposite of organizational careers – careers conceived to unfold in a single organizational setting” (p. 5). Boundary-less careers in contrast unfold across multiple organizational settings – indeed across multiple organizations. However, confusion has been caused by the fact that while this definition seems to privilege inter-organizational mobility as a type of career movement, those writing about boundary-less careers often broaden their definition of boundary-less mobility to movement between jobs, firms, occupations and countries (Sullivan & Arthur, 2006). Boundary-less careers are supposedly encouraged by the increased permeability, in the less structured economic formats of today, of various forms of career boundary. However, commentators have noted that in the literature on boundary-less careers there appears to be much confusion about the definition of relevant boundaries (Feldman & Ng, 2007; Gunz, Peiperl, & Tzabbar, 2007), again reinforcing the point that career mobility can only be properly considered if there are agreed maps of the dimensions across which such mobility may take place.

Feldman and Ng (2007) in a recent review, discuss career mobility in comparison with “embeddedness”. They note that job mobility and occupational mobility are different from each other: for example one can change one’s occupation without changing one’s organization and vice versa, and one can change one’s job without changing either. Feldman and Ng consider a range of forces, from macro (“landscape”) to micro (“traveler”) forces (Inkson & Elkin, 2008) affecting mobility/embeddedness, these being the structural labor market, the occupational labor market, the employing organization’s policies and procedures, work-group factors,

forces in the individual's personal life, and personal style differences. Based on the wider range of forces within these headings and their observed effects, one can at least notionally model and predict mobility for both individuals and collectivities such as the members of a particular organization or occupation.

Boundary-less careers have been characterized as involving the transfer of power over the career from the organization to the individual. The individual, in the changed context of more flexible labor markets and organizations, is likely to want to make his or her career a mobile one that crosses many of the boundaries in social and economic space, most prominently the boundaries around organizations, whose control over their members' careers are thereby weakened. The "new careers" (Arthur, Inkson, & Pringle, 1999) encompass many different jobs, occupations and organizations within a lifetime. The eagerness of individuals to cross boundaries is no doubt caused in part by post-modern emphases on challenge and variety in working lives as almost a birthright of educated people in the new millennium – the right to be stimulated (Spacks, 1995).

In an overarching view of career studies (Gunz & Peiperl, 2007), the concept of career, and the mobility it generates, is considered largely to be a result of an evolving sequence of interactions between individual agency and social structure, and to understand the career we must understand not just the motivation and direction of the career actor but the features of the landscape (Flat or mountainous? Desert or swamp? Stable or earthquake-prone? Pathways clearly marked?) across which he or she travels (Inkson & Elkin, 2008). Unfortunately, there are at least three major traditions of careers research ("vocational psychological", "organizational", and "sociological") which are essentially separate from each other (Collin, in press), each of them seeking to define and map the careers landscape in a different way, so that understanding the relative importance of individual agency and landscape characteristics, and the nature of the interaction between them, is difficult. Again we face the question, what are the key spatial dimensions through which careers move? Are these defined in terms of jobs, occupations, organizational forms, industry structures, economic geography, or by wider social structures such as barriers imposed by gender, ethnicity and education (Johnson & Mortimer, 2002), which can clearly influence any or all of the others? Here we adopt an eclectic view.

In discussing individual agency as a determinant of career, we consider career as a "project of the self" (Grey, 1994) through which career actors seek to determine part of their personal identities (Tharenou, this volume). However, choosing a geographical location for one's life may be equally, or more, important in the process, and may be linked with career choices. A common direction for identity construction is that the individual should identify herself or himself as a "success", so that the much-debated concept of career success becomes important (Gunz & Heslin, 2004). Here, the construction of career as a subjective as well as objective phenomenon is important, since there may be a separation between the objective markers of success such as status and salary, and the subjective markers such as job satisfaction and work-life balance. For the individual, career mobility may be predicated on personal make-up and career goals, and progress to these may be best dealt with by objective measures for some and by subjective measures for others.

Career Mobility and Career Capital

One way of understanding the dynamism that underlies career mobility is to consider the individual's career as a source of personal capital for that person. Thus, career capital is knowledge capital gained through career and other experiences. According to Inkson and Arthur (2001), career capital includes "knowing-why" capital (the individual's motivation and values and the way in which these energize work behavior), "knowing-how" capital (skills, qualifications, expertise and experience), and "knowing-whom" capital (contacts, networks and reputation). As people pursue their careers they invest their capital in various employment opportunities, often sharing it with the employers for whom they work, but also gaining new capital through their appropriation of the values, direction, expertise and networks of that employer. The objective of pursuing a career is not just to obtain financial and psychological benefits, but to build one's capital, affording the opportunities for further, possibly superior investments later. In the case studies that opened this chapter, Henry Wilson apparently found that his continuing investment in the organization-specific capital of his employing company continued to provide good opportunities, while Peter Harrison, with different "knowing-why" priorities, invested in mid-career retraining (as a teacher), and found that the investments that yielded greatest return in the currencies he valued were best accessed by means of foreign travel.

The idea of career capitalism also enables us to connect careers usefully to the organizations in which they are enacted and to the wider society. The investments that individuals make into these wider institutions are reciprocal. If we consider career trajectories as resembling the flight-paths of bees between pollen-bearing flowers, it is evident that in the process of cross-fertilization, both parties benefit. Arguably, therefore, organizations and indeed society itself depend on the career mobility of individuals between various institutions to enrich the knowledge capital of those institutions. While organizational careerists like Henry Wilson strengthen institutional capital from within, it requires the constant mobility of mobile careerists like Peter Harrison to introduce novel capital from other organizations, industries, and countries. While many organizations strive to keep labor turnover low through the encouragement of stable, loyal workforces, all organizations also require, in the long-term, the continuing introduction of knowledge capital from elsewhere. How much, and in what form, to introduce such resources – Make or buy? New graduates or rotation of senior managers? Sabbaticals? Expatriation within multi-nationals versus recruitment of locals? – is a continuing riddle of human resource management (Carr, Chapter 7 this volume).

Geographical Mobility – A Neglected Area of Career Studies

While there is, in this literature, some appreciation of the interaction of economic geography and occupational/organizational choice – for example in the location of "industry regions" such as Silicon Valley as nexuses for specific careers (Badgagli,

Solari, Usai, & Grandori, 2003; Saxenian, 1996) – by and large physical mobility does not feature strongly in writings about careers. An exception is in the growing interest in international careers. This has been fanned by the growing practice, in multinational organizations, of employee expatriation (Feldman & Thomas, 1992); the increasing levels of inter-country mobility (OECD, 2008); and the observation of increasing self-initiated international mobility as a means of self-development (Inkson, Arthur, Pringle, & Barry, 1997; Myers & Pringle, 2005; Tharenou, this volume) and the related problem of “brain drain” (Baruch, Budhwar, & Khatri, 2007; Rizvi, 2005).

There is, therefore, a growing cadre of “highly skilled globetrotters” (Mahroum, 2000) who apparently migrate their careers around the world to wherever they can gain greatest immediate advantage (in money, career development and family and lifestyle opportunities) and long-term career capital accumulation. In the second half of this chapter, therefore, we pay specific attention to factors shaping geographical – particularly international – mobility in careers.

Geographical Career Mobility: Causes and Types

Globalization has changed the way the world operates (Furnham, this volume). Business interactions can take place in virtual rather than physical space, making geographical location arbitrary. Cheaper communications and transport have resulted in a recognition that distance and boundaries are increasingly irrelevant in an international marketplace (Helliwell, 1999). These trends are not restricted just to flows of materials and money (Conradson & Latham, 2005), but also encompass the movement of people across national boundaries, dramatically impacting on the workforce. For example, there are now more than 35 million people in the USA who were not born there, up from 10 million in 1970, while in the OECD net new settlement accounts for nearly ten times as much as net population growth as births and deaths (IOM, 2005). Such changes have substantially changed the “calculus of global competition” (Thomas, Lazarova, & Inkson, 2005, p. 342). There is competition for jobs and labor, not only from developed countries but also from developing countries, as organizations harness the knowledge that is inherent in the structures and systems of business and, more importantly, the collective capabilities of their most valued and skilled employees (Birkinshaw, 2005). In this context, the importance of mobility is derived from its contribution to the formation and transfer of that knowledge (OECD, 2008) – “career capital”. In addition, in the new interconnected world, career actors’ knowledge of potential career opportunities and “places to be” has expanded, and they see new possibilities and dreams for both career and lifestyle. In some cases, location can be determined primarily on the basis of personal (non-work) preference.

While mobility is not new, its nature is changing. It is becoming more complex, with an expanded geographical range (Cappellen & Janssens, 2005). Long-term expatriation and new settlement is being supplemented by new forms of

mobility, such as short-term transfers and commuter assignments (Fenwick, 2004). There is also a shift from being “sent” to another country as a corporate expatriate, to choosing to facilitate or to initiate that move personally (Napier & Taylor, 2002).

The question of what motivates a person to move to another country is frequently raised in the literature, but, in the past, has often been answered with a single motivating factor (Raghuram, 2004), usually centred on financial benefits (Carr, Chapter 7, this volume; UNDP, 2009). Increasingly, however, authors recognize the importance of exploring the interplay of the needs and characteristics of the individual with additional factors that may influence a decision to be mobile (Ackers, 2005; Banai & Harry, 2005). Mobility is influenced not by a single motive, but by an equation of motives which varies according to age/career stage, gender or location of residence (Thorn, 2009; UNDP, 2009), set against the perceived characteristics of particular geographical locations. At the time of writing, people from Zimbabwe are flooding into South Africa, driven by economic necessity and political oppression (Rutherford, 2008). Asian new settlement to Australia, on the other hand, is motivated initially by quality of life factors, yet the new settlers may seek subsequent movement to the United States, where economic benefits are perceived to be greater (Australian Senate, 2005). Based on literature review (Thorn, 2009), and an empirical factor analysis by Jackson et al. (2005), six broad motives which influence geographical mobility have been identified. These are summarized in Table 13.1.

For each individual, the motivating factors can also vary over time as priorities change. The following spatial trajectory illustrates the movements of New Zealand mechanical engineer Brian Schlaadt. Note his pattern of repeated return to his home country. The variety of motives driving his behaviour at different times in his career is indicated in the Table 13.2, below the Fig. 13.1.

Cappellen and Janssens (2005, p. 356) define careers like Brian’s as global careers and view them not as a single event, but as a path, where “each move is influenced by a different intersection of the factors within the individual, organizational and global environment domains.” They recognise the influence of changes over

Table 13.1 Summary of motives of geographical mobility

Motive	Description
Career	The current work situation and condition, current and future career development and future career aspirations
Cultural and travel opportunities	The opportunity to experience greater cultural diversity, the adventure of living abroad, and greater travel opportunities, e.g. valuing characteristics of a particular ethnic culture
Economic	The financial costs and benefits of living and working abroad, e.g. salaries in relation to cost of living, taxation systems
Quality of life	Factors that improve the way one is able to live one’s life
Political environment	Factors relating to the politics of the home or host country, e.g. dictatorship versus democracy, oppression of specific ethnic groups
Family/social relationships	Factors relating to a partner, family, extended family or friends), e.g. looking after aged parents, seeking good education for children, having a valued social network)

Table 13.2 Career motivation – diversity over time

Move	Description	Length of time	Motive
1	Travel to UK		Cultural and travel opportunities
2	Travel around Europe	1 year	Cultural and travel opportunities
3	Brisbane, Australia	4 years	Economic, family
4	Bathurst, Australia	1 year	Career
5	Gladstone, Australia	2 years	Career
6	Auckland, NZ	3 years	Family (children to get to know grandparents and cousins)
7	Indonesia	1 year	Career (commuting without family)
8	New Zealand	1 year	Family
9	Philippines	6 months	Career (commuting without family)
10	New Zealand	1 year	Family
11	Sydney, Australia	3 months	Economic (commuting without family)
12	New Zealand	3 years	Family, career
13	Indonesia	4 years	Cultural and travel opportunities
14	Kenya?		Economic, cultural and travel opportunities

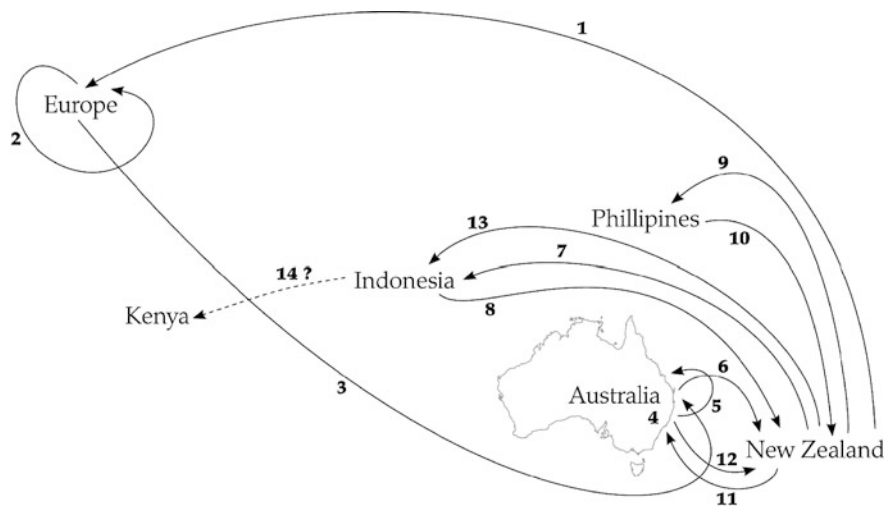


Fig. 13.1 Spatial trajectory showing motives for global mobility

time on the pathway, but suggest that travellers create their path through their own directed activity. While career development has been one driving force for Brian’s moves, the opportunity to travel and explore a new culture is another important motive for his restlessness.

For some people, however, the latter is the dominant motive. Clifford (1997, p. 1) suggests that as a response to the “relatively rigid patterns of modernity” there is a “new world order of mobility” where society as a whole is becoming

more restless and mobile (also, Frieze & Li, this volume). The restlessness seems to regenerate. It is eased by a new location and a period of assimilation to the new location, but once people have consumed the experiences offered by one place, the restlessness increases and a new destination is sought. For these restless people, the acculturation noted by Hofstede (2001) happens quickly, but the feeling of being settled in the new location creates unease. Mobility is so possible and so much a part of the psyches of restless people that it often appears that geographical boundaries are dissolving.

Benefits and Drawbacks of International Mobility

Internationally mobile workers diffuse their knowledge, both directly and indirectly, at different levels of their new location. There are implications for the individual and the organization. At the individual level, mobility becomes an imperative for career development, being increasingly important for the promotion of academics (Richardson & Mallon, 2005) and general managers (Stahl & Cerdin, 2004). Milne, Poulton, Caspi, and Moffitt (2001, p. 451) have shown that there are significant personal differences between those who go abroad and those who do not, with travelers being “better qualified, more intelligent. . .leaner, fitter, happier” than non-travelers. Mobility also provides the opportunity for a broadened international knowledge, including understanding the complexities of global operations and new languages and cultures, and sometimes provides an increased network of contacts or “knowing whom” competencies. New career opportunities may be available, particularly when moving from a smaller economy to a larger one (Nyberg-Sorensen, Hear, & Engberg-Pedersen, 2003), or from a less developed to a developed economy (Ferro, 2004; Carr, Chapter 7 this volume; UNDP, 2009). Mobility can provide opportunities for personal reassessment (Myers & Pringle, 2005), resulting in a growth in confidence, risk taking and relationship development.

However, there are also penalties for those with global careers. Peter Harrison, our mobile highflier from the case study, commented:

Is such a lifestyle easy to lead? No it isn't. It often involves all kinds of sacrifices, especially in family life. For me, married life proved impossible to sustain because of my wandering lifestyle. And people should be warned that living as an expat is not always a good way to make money, or to store up material riches.

Peter's identification of the difficulty of maintaining networks when mobile is reiterated in the repatriation literature, and highlights the difficulties expatriates have re-establishing their professional identity back in the home organization (Lazarova & Tarique, 2005).

Mobility has benefits for organizations and even nations as well as for individuals. As indicated above, for organizations, careers act as repositories of knowledge (Bird, 1994), and allow for the transfer of that knowledge among organizational entities such as foreign subsidiaries. Knowledge of foreign geographical locations and contrasted cultures can be especially enriching. The flow of people into institutions

can therefore channel new knowledge. It can speed up knowledge dissemination and learning processes, create new combinations of knowledge (OECD, 2008) and provide access to the knowledge in industry networks (Thomas et al., 2005). The flow of people out of the organization, however, can result in the loss of specific skills, and a globalized labor market means that there is competition for employees from other organizations.

New Zealand: A Case Study of Mobile Careers and Career Capital Transfer

In this chapter so far, we have examined the theoretical aspects of career mobility and career capital. In this section, we draw on research from a specific country, New Zealand, to illustrate various forms of global mobility.

New Zealand, like many other countries, is dependent on new settlers, with an aging population, declining fertility rates (Creedy & Scobie, 2005) and specific skill shortages, resulting in a reduced ability to remain competitive in a global economy. New Zealand needs new people to boost its population, enhance competitiveness and stimulate foreign interest (Spoonley & Bedford, 2008). Table 13.3 shows movements in and out of New Zealand since 1998. In 2008, a net total of 40,863 people immigrated into New Zealand. The majority of these entered under the category of “Skilled Migrant”, so they brought their qualifications, skills and work experiences with them.

It is the other side of the mobility equation, however, that makes New Zealand a particularly good case study for the examination of global mobility. The flow of New Zealanders to other countries has long been a concern to the Government. Over the 10 year period shown here, nearly 553,000 New Zealanders left the country while only 260,000 returned, leaving a deficit of 293,000 or around 6% of the total population born in New Zealand. The trend of increasing net departures over the last 6 years is clearly evident. As in other mobility-dependent countries, the overall impact of these mobility figures dwarfs “internal” changes in the population due to births and deaths. Moreover, whereas most newborn babies do not enter the workforce for 15–20 years, and most deaths are of elderly people who have long since left it, mobility impacts workforce composition directly and immediately. It also changes dramatically the cultural mix and diversity of the country.

These New Zealand mobility statistics have resulted in a discussion on whether New Zealand is experiencing a brain drain, brain gain or a brain waste. Quite clearly the loss of New Zealand citizens is a brain drain. New Zealand has invested in the education of those who later emigrate from its shores. However, with the increasing mobility of New Zealanders, this investment in education is not being realized within New Zealand and other countries are benefiting. The magnitude of this flow out of the country is especially salient due to the limited size of the economy and the need to compete with wealthier countries for this essential capital (Nyberg-Sorensen, Hear, & Engberg-Pedersen, 2003).

Table 13.3 Permanent and long-term mobility by country of citizenship (*Source: Statistics New Zealand, 2008*)

Country of citizenship		New Zealand			Non-New Zealand			Total		
Period	Arrivals	Departures	Net ⁽¹⁾	Arrivals	Departures	Net ^a	Arrivals	Departures	Net ⁽¹⁾	
To/from all countries										
Year ended December										
1998	21,299	48,273	-26,974	36,921	16,212	20,709	58,220	64,485	-6,265	
1999	22,551	53,215	-30,664	37,192	15,557	21,635	59,743	68,772	-9,029	
2000	20,763	58,680	-37,917	42,231	15,626	26,605	62,994	74,306	-11,312	
2001	23,465	56,031	-32,566	57,629	15,337	42,292	81,094	71,368	9,726	
2002	25,417	42,112	-16,695	70,534	15,641	54,893	95,951	57,753	38,198	
2003	27,691	38,859	-11,168	64,969	18,895	46,074	92,660	57,754	34,906	
2004	25,069	43,190	-18,121	55,410	22,181	33,229	80,479	65,371	15,108	
2005	24,165	49,201	-25,036	54,798	22,791	32,007	78,963	71,992	6,971	
2006	24,018	47,616	-23,598	58,714	20,507	38,207	82,732	68,123	14,609	
2007	22,969	55,645	-32,676	59,603	21,436	38,167	82,572	77,081	5,491	
2008	23,553	60,602	-37,049	63,910	23,047	40,863	87,463	83,649	3,814	

^a A minus sign indicates an excess of departures over arrivals.

New Zealand also, however, receives the skills from new settlers, resulting in what some researchers have called a brain gain (Choy & Glass, 2002). This brings new talent and ideas into the adopted country. Unfortunately, as is also the case in other countries, the expectation that the new settlers will find employment that matches their qualifications and experience is often not achieved (Carr, Inkson, & Thorn, 2005). Reasons for this include prejudice in the labor market (Podsiadlowski & Ward, this volume), employers' inertia (Maynard et al., this volume) and new settlers' inability to acculturate successfully to the new country (Berry, this volume). Such brain waste is a "deplorable under-utilisation of human talent" (Coates & Carr, 2005, p. 578), and results in both economic and social costs (Carr, Chapter 7, this volume).

A range of recent research indicates different forms of mobility, including movements from New Zealand to other developed economies, to less developed economies, and from less developed economies to New Zealand. One of these studies included the distinction between the mobility being self-initiated and expatriate assignment. Inkson et al. (1997) compared the well-researched event of corporate expatriation against the phenomenon of Overseas Experience (OE). New Zealand also has an established culture of "the Big OE" – a period where young people leave New Zealand for periods of one to 10 years to explore the world (Inkson & Myers, 2003). The "Kiwi OE" is perhaps an example of what the United Nations' *Human Development Report* for 2009 might term a "culture of migration" (UNDP, 2009, p. 80). Career development was not originally a priority for these people (Inkson et al., 1997), and jobs tended to be ad hoc and casual. Career capital is built, however, not only through travelers' work, but from the experience of living and working in a different culture. Most people going on their OE intend to return to New Zealand (Inkson & Myers, 2003), bringing with them their increased capabilities, adaptability and the knowledge that they can cope outside their familiar zone. Another study, of mainly mid-career New Zealanders taking 2 years out of the country engaged on unpaid voluntary work in which they applied their career capital to development projects in "Third World" economies, similarly showed major career capital development, particularly in the "knowing-why" area (Hudson & Inkson, 2006). In such cases, exposure to new ideas and new ways of working enables the development of individual career capital and eventually the human capital of New Zealand.

Media focus on the brain drain from New Zealand subsequently led Inkson and colleagues to examine the issue of professionals living abroad (Inkson et al., 2004). The responses from over 2,200 people enabled an examination of the factors which attracted people either to remain away from New Zealand (push factors) or return there (pull factors). High on the list of push factors were salaries and career opportunities, suggesting that for these highly educated individuals, building career and financial capital through enhanced career opportunities is important. Pull factors were associated with being closer to relatives and aging family members and having a familiar and pleasant environment for family life. The calculus of global mobility and return is thus nicely set in New Zealand, which offers an attractive

lifestyle based on social and family life, but cannot offer the high-level career opportunities, salaries and opportunities for wealth of some other developed nations, such as the USA.

New Zealanders are renowned as travellers (Bedford, 2001), and research in this country shows a wide range of movements into and out of New Zealand. The career capital that is built through an individual's mobility can be skills-based or social, and provides the country travelled to, or returned to, with new ideas, increased confidence and a willingness to tackle new challenges. For New Zealand however, the career capital equation is complicated, with highly educated New Zealanders following their career paths in other countries being replaced by new settlers who may not be able to fully utilize their career capital. Hence the career capital increment is not as high as a purely empirical analysis might suggest. The ability of New Zealand to remain competitive in this situation may provide important lessons for other countries.

Conclusion

Sluggish, functional caterpillars turn into beautiful, mobile butterflies. And butterflies, like the bees we referred to earlier, are cross-pollinators. We started this chapter with the stories of the immobile, caterpillar-like Henry Wilson, who found a lifetime of usefulness within the narrow confines of an accountant's office, and the very mobile Peter Harrison, typical of today's globetrotting careerists as they flit butterfly-like to the far corners of the globe, cross-pollinating organizations, occupations, and societies, and enriching themselves, at least psychologically, in the process.

One can, of course, have too much mobility, or too much apparently aimless mobility, to the extent that potentially transferred knowledge fails to take root, for lack of time, or where there is no core of established knowledge to link to. And involuntary mobility, where casual laborers must come and go at the whim of employers, or established employees are laid off due to corporate restructuring, brings much misery to individuals (UNDP, 2009).

But provided mobility does not go too far, or affect too many people simultaneously, we believe career mobility brings benefits both to individuals and to larger collectives, principally through the opportunities they create for new learning, and the combination of new with old knowledge. And, while many accounts of career imply that the mobility inherent in career transitions should be purposeful and planned, the theory of "planned happenstance" in careers (Krumboltz & Levin, 2002) suggests that mobility for its own sake may bring serendipitous benefits. While such an analysis can be applied to the regeneration and development of individuals, or of occupations, or of organizations, or of industries, or indeed of families, in this chapter we have focused on the special role of geographical, particularly international, career mobility in facilitating the development of countries and the institutions within them.

The future of career mobility is uncertain. At the time of writing, with economic recession threatening international trade patterns and labor markets, and environmental concerns being sounded against the relentless expansion of international travel, it may be that international career mobility at least faces a period of interrogation. On the other hand, because mobility, particularly international mobility and “boundary-lessness”, is becoming a way of life for a huge and increasing proportion of people, it is a phenomenon with huge potential for both personal development and societal enhancement. New thrusts and insights in both careers research and other research are badly needed. The psychological bases of mobility, in particular, are not well understood, and the problem of integrating the career travelers, however high and appropriate their career capital, usefully within society remains a difficult one in many countries. We hope that in coming years we will learn much more about these key dynamics of human action and enterprise. New, more interdisciplinary foci are needed (Arthur, 2008). The challenge of understanding, nurturing and utilizing the new butterflies and bees of our boundary-less globalized world remains an important and intriguing one.

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Chapter 14

Global Mobility and Bias in the Workplace

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Abstract Economic aspirations are one of the major motivations for international mobility, but new settlers are more often unemployed or underemployed than their native-born peers and may never attain parity in labor market outcomes. This book chapter discusses bias in the workplace, commencing with evidence of inequality in the labor market and organizations, and then outlining areas in which bias may operate to create and maintain inequalities. Bias in the workplace is particularly relevant in the recruitment and selection process, but can also be seen in connection with performance evaluation. Employment bias may occur when pre-screening applicants, choosing recruitment and selection methods and criteria, and appraising selection criteria. Reasons behind bias at the workplace lie in a complex interplay of interpersonal and intergroup processes on an individual, organizational and societal level. Social psychological processes such as social categorization and comparison, perception of dissimilarity, stereotyping and inter-group conflict help to understand why systematic bias occurs and how it leads to the unequal participation of immigrants and new settlers in the workplace. Furthermore, personal and situational factors, such as intercultural contact, workforce demographics and societal-level attitudes, often underpin bias and discrimination. The chapter concludes with practical recommendations for counteracting bias in the workplace, considering the roles organizations and managers can play as key agents of change.

Keywords Social inequality · Employment bias · Performance bias

Abbreviations

OECD	Organisation for Economic Co-operation and Development
SIT	Theories of Social Identity
SCT	Self Categorization
SDO	Social Dominance Orientation

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There are currently 191 million people worldwide who live outside their countries of origin (OECD, 2007). A wide range of “push” and “pull” factors affect the choice to move and resettle in a new country; however, economic aspirations are the major motivation for international mobility (Carr, Chapter 7 this volume). Striving for financial security and a better quality of life may underpin global mobility, but new settlers are more often unemployed or underemployed than their native-born peers, and in many cases never attain parity in labor market outcomes (UNDP, 2009).

These inequalities arise from a range of sources; however, bias has been identified as a key underlying factor (UNDP, 2009, p. 51). This chapter discusses bias in the workplace, commencing with evidence of inequality and outlining the areas in which bias may operate. It then goes on to describe the socio-psychological processes underlying bias and concludes with practical recommendations for counteracting bias in the workplace.

Global Mobility and Inequality

Inequalities in the Labor Market

Although most Western countries formulate new settlement policies with the objective of attracting and retaining skilled labor, it is often the case that new settlers’ skills are under-utilized and that their labor market participation compares unfavorably with native-borns. For example, the 2006 unemployment rate for Austrian citizens constituted 8.2%, but was 13.4% for foreign-born residents (Statistik Austria, 2007). The highest unemployment rates were found in new settlers from Turkey (16.7%), followed by those from Poland (15.7%). New settlers from the former Yugoslavia – who altogether comprise the largest group – had a significantly lower rate of unemployment (9.3%; Statistik Austria, 2007). In the Netherlands, a country with a relatively diverse population, the 2004 unemployment rates amongst non-Western persons of foreign heritage (16%) were three times higher than for those of the native Dutch (Choenni, 2006, based on Statistics Netherlands).

International data suggest that ethnic background has a bearing on employment, even in those countries that are high in cultural and linguistic diversity. Research on visible minorities in Canada shows that Chinese do best within the Canadian society, whereas Indo-Pakistanis do worst with regard to income and labor market participation (Hum & Simpson, 1999). However, even within the same ethnic group, “immigrant” status has been shown to play a significant role in labor market outcomes. In New Zealand, for example, overseas-born Chinese have a median income of \$7,900 compared to \$20,200 for New Zealand-born Chinese (Statistics New Zealand, 2002a, 2002b). Language proficiency and shared history also have an impact on employment outcomes. Chinese new settlers in New Zealand who originate from former British colonies that use English as an official language (e.g., Singapore, Hong Kong) show better labor market outcomes and trends in

occupational distributions than those from the People's Republic of China (Statistics New Zealand, 2002a).

Case Study 1: Labor Market Participation in New Zealand

New Zealand is a country of four million people where approximately one in five people is overseas-born. New settlers are primarily recruited on the basis of skills, education and language proficiency. Although overseas-born residents on average hold higher educational qualifications than native-borns, they are more likely to be unemployed (9% compared to 7.1%). There are also large variations in unemployment rates based on region of origin. Those from the United Kingdom and Ireland (4.2%) and from Northwest Europe (5.1%) have the lowest rates of unemployment, followed by those from the Americas (7.4%) and sub-Saharan Africa (7.9%). New settlers from North Africa and the Middle East (23.8%) have the highest unemployment rates. Residents from Asia (Northeast, 16.5%; South and Central, 13.9%; Southeast, 11%) and the Pacific Islands (13.5%) occupy an intermediate position (Statistics New Zealand, 2002a). Under-employment is also a significant issue in New Zealand. Recent findings from the Department of Labour's Longitudinal Immigration Survey indicated that over a quarter of new settlers were working at a lower skill level after their arrival in New Zealand (Masgoret, Merwood, & Tausi, 2009).

Inequalities in Organizations

Organizational research also shows that nationality and ethnic background are salient categories that underpin social inequalities in the workplace (Baron & Pfeffer, 1994; Riordan, Shaffer, & Stewart, 2005; Carr, Chapter 7 this volume). Research further suggests that these inequalities are widely recognized and acknowledged by new settlers who report that discrimination is most commonly experienced in work-related areas (New Zealand Immigration Service, 2004). Horizontal segregation in organizations plays a role in perpetuating inequalities, as members of ethnic minority groups are more likely to be found in jobs (e.g., production) that are associated with lower pay (Carr, Chapter 7 this volume). Indeed, there is evidence that an increasing proportion of ethnic minorities in an occupation leads to salary decrements for all people working in this occupation (Kalleberg & van Buren, 1996). Furthermore, as members of ethnic minorities are unevenly distributed across the organizational hierarchy, vertical segregation is also apparent. In particular, there is a disproportionately low number of ethnic minorities in top management positions (Morrison & von Glinow, 1990; Reskin, McBrier, & Kmec, 1999). Not only are ethnic minorities denied equal access to societal and

organizational rewards, research from the Netherlands (de Vries, 1997) and New Zealand (Diego & Fischer, 2007; Diego & Podsiadlowski, 2006) shows that they also face greater problems of everyday discrimination in the workplace (Deitch et al., 2003).

Bias in the Workplace

In the previous section we have established that inequalities linked to ethnicity and “immigrant” status exist in the workplace and the labor market. Although these inequalities may be underpinned by broad socio-political, economic and structural factors and affected by aspects of the human, cultural and social capital new settlers bring to the labor market, here we argue that systematic bias on individual, organizational and societal levels plays a fundamental role in creating and maintaining the inequalities (see also, Hernández-Plaza et al., this volume; Maynard et al., this volume). Those issues are discussed in the context of organizational career development (Inkson & Thorn, this volume), which includes both finding and maintaining employment (Carr, Inkson, & Thorn, 2005). Accordingly, bias is examined in the recruitment and selection process as well as in connection with performance evaluation (Carr, Chapter 7 this volume; Maynard et al., this volume).

Employment Bias

Bias in Pre-screening Applicants

Employment bias takes place when job-irrelevant factors or characteristics influence an employment decision. This type of bias initially occurs in the pre-screening process of job applications as both ethnicity and “immigrant” status are known to affect the likelihood of obtaining employment over and above qualifications and work experience (e.g., Bertrand & Mullainthan, 2003). New Zealand studies illustrate these trends. Ward and Masgoret’s (2007) naturalistic field experiment with New Zealand recruitment agencies showed that Chinese new settler candidates were significantly less likely to be contacted for further information and significantly more likely to have contact terminated by the recruitment agencies than native-born candidates of European descent, despite having equivalent educational and occupational experience and the same standard of written English. Further studies have demonstrated that both “immigrant” status and country-of-origin influence probable selection, with native-borns and those new settlers originating from Australia, Great Britain and South Africa preferred to new settlers from China and India (Coates & Carr, 2005; Wilson, Gahlout, Liu, & Mouly, 2005). In addition, simulated short-listing experiments with practising managers found that Asian candidates increased the likelihood of being short-listed by anglicizing their names (Wilson et al., 2005). The practice of skills “discounting”, that is, the biased devaluation of the qualifications and experiences of foreign employees even if the quality of their

skills is equivalent or better, can partially account for these findings; however, the evidence strongly supports the contention that pre-screening applicants on the basis of employment résumés is also significantly affected by ethnic biases (Esses, Dietz, & Bhardwaj, 2006; UNDP, 2009).

Bias in the Choice of Recruitment Methods

A range of recruitment methods is available for the selection process, each with varying levels of inclusiveness and effectiveness. International research has shown that employee referrals are more likely to generate job offers than advertising (Rafaeli, Hadomi, & Simons, 2005) and that they are more likely to result in interviews and job offers than other methods of referrals, even after controlling for pre-hire differences (Fernandez & Weinberg, 1997). However, the use of referrals, in-house recruiting, personal contacts, and word-of-mouth and existing databases tend to lessen the opportunities of new settlers who are not part of those networks and not already known to the business community. Even advertising, as one of the most frequently used tools, can rely upon various channels (e.g., internet, paper, in-house) which new settlers may find relatively inaccessible.

The Longitudinal Immigrant Survey in New Zealand has shown that skilled new settlers are initially more likely to secure employment by responding to advertisements (34%) and making a direct approach to an employer (25%) than through friends and relatives (14%; Masgoret et al., 2009). Approaches to recruitment agents (14%), who can function as gatekeepers or promoters depending on their bias in pre-selecting potential applicants, also generate new settler employment. Contemporary research on recruitment best practices tells us that the characteristics of the sought-after employee should determine the recruitment methods (Breugh, 2008); to date, however, there has been little attention paid to ways in which recruitment bias against new settlers might be eliminated or the methods that might be used to recruit them more effectively.

Bias in the Choice of Selection Methods

The prevalence of and preference for selection techniques vary across countries; consequently, the choice of selection tools may bias employment decisions, advantaging or disadvantaging new settlers dependent upon their previous exposure to the chosen methods. Although interviews, resumes and work samples are perceived favorably and widely used in the international arena, views about personality, ability and honesty tests and reliance on assessment centers are more variable across countries (Anderson, Witvliet, & Carlijn, 2008; Steiner & Gilliland, 2001). Testing is highly likely to introduce selection bias as the cross-cultural validity of measures like personality or intelligence is subject to question, and assessment in the absence of culture-specific norms lessens the transferability and reliability of test results (Cheung & Cheung, 2003; Cole, 2004). Furthermore, the fundamental issue of test bias and equivalence, i.e., whether test scores from different populations can be interpreted in the same way, must be resolved before instruments can be used with

confidence (van de Vijver & Tanzer, 2004). The choice of assessment techniques that are generally restricted to a limited range of countries also presents problems. Graphology is popular in France, though this is not the case in other Western industrialized nations (Ryan, McFarland, Baron, & Page, 1999), and blood typing as an indicator of personality (Iwaki, 1997) has been used in Japan despite a paucity of empirical evidence to support its validity as a selection tool (Cramer & Imai, 2002).

The differential validity of selection techniques may also adversely affect employment decisions involving an international workforce. A meta-analytic study by Schmidt and Hunter (1998), which assessed the relationship between various selection methods and criterion measures across cultures, found that work sample tests and structured employment interviews (r 's = 0.51) performed the best, followed by peer ratings, job knowledge tests, job tryout procedures and integrity tests (r 's = 0.41–0.49) and then by unstructured employment interviews, assessment centers and biographical data (r 's = 0.35–0.39). Reference checks, job experience, training and experience, years of education, interests and graphology scored particularly low. In sum, selection techniques vary in their favorability, reliability and validity within and across cultures, and their choice and application bear the risk of selection bias. However, research on the direct relationship between the type of selection method and the demographics of selected applicants is relatively scarce.

Bias in the Choice and Appraisal of Selection Criteria

Barriers to new settler employment may also arise in the selection process when there are mismatches in the expectations about job-relevant characteristics between employers and their potential employees. For example, an employer may be seeking a highly motivated, enthusiastic employee with excellent interpersonal skills. An international applicant may possess these qualities, but fail to demonstrate them in an interview as technical expertise, organizational talent and leadership qualities may be seen as priorities from his or her cultural perspective. Even when there is cross-cultural consistency in the relative merit of the selection criteria, their behavioral indicators may vary across cultures. There are significant cross-cultural differences in verbal communication styles relating to emotional expression, consensus and conflict, directness, status and hierarchy, and the importance of context, each of which can easily lead to misinterpretations and misunderstandings (Gudykunst & Ting-Toomey, 1996). The same can be said about nonverbal communication styles, where research has shown that cultural differences can be a more powerful determinant of person perception than ethnicity (Dew & Ward, 1993).

The interpretation and evaluation of cultural differences may lead to biases in both negative and positive directions: differences may be perceived as a threat, diverse perspectives as an asset. Overall, however, there is ample evidence that interviewers tend to select candidates who are demographically similar to themselves (Goldberg, 2003; Purkiss et al., 2006). Consequently, although race, ethnicity and

“immigrant” status are job-irrelevant factors, they appear to function as implicit selection criteria, disadvantaging some but not other globally mobile employees who are trying to gain entrance into labor markets occupied primarily by native-borns (UNDP, 2009).

A Case Study of Employment Bias

Case Study 2: Recruiting and Selecting Employees in New Zealand

As part of a research project on Facilitating New Settlers’ Entry and Integration into Workplace, 18 qualitative, in-depth interviews were conducted with employers, human resource managers and recruitment agents in New Zealand businesses (Podsiadlowski, 2006). The findings revealed that the most prevalent recruitment methods were advertising, networking and the use of recruitment agencies. Pre-screening was based on résumés, references and telephone checks. Face-to-face interviews were the most common selection method, and these were generally unstructured and conducted in an individual, as opposed to a group, context. Psychological tests were sometimes applied, mainly measuring cognitive abilities and personality. When asked about selection criteria, 85% of the participants’ statements referred to “organizational fit” with regard to soft skills (e.g., team fit, relational or networking skills) and personality. The “ideal employee” was most frequently described as having great interpersonal skills (34%), being highly motivated (21%) and very energetic (21%). Intuition was also said to be an important aspect of participants’ selection decisions. In a follow-up survey with 100 New Zealand employers, English language difficulties, lack of job experience, lack of New Zealand knowledge, new settlement difficulties, negative employers’ attitudes, communication difficulties and recognition of qualifications were identified as the main reasons (in that order) for not employing new settlers (Podsiadlowski, 2006).

How might these practices demonstrate recruitment and selection biases that disadvantage new settlers?

1. *Recruitment methods.* Under the right conditions advertising can be a fair and appropriate recruitment method; however, networking clearly disadvantages newcomers, and bias against new settlers by New Zealand recruitment agencies has been demonstrated in experimental field research.
2. *Pre-screening.* Short-listing and probable selection on the basis of résumés in New Zealand have been shown to be affected by ethnic background, “immigrant” status and country of origin.

3. *Selection methods.* Although psychological tests are used less frequently than other methods, the international literature clearly points to bias and limitations related to cross-cultural validity and the absence of culturally appropriate norms. Furthermore, unstructured interviews demonstrate low cross-cultural validity.
4. *Selection criteria.* The search for ideal qualities, including interpersonal skills and motivation, is complicated by cultural differences in expectations and communication styles in addition to employers' willingness to rely upon intuition. Although we are unaware of research that deals with intuition and appraisal in organizational contexts, other areas of applied psychology have described intuition as the basis for evaluation as "famously prone to fallacies and bias" (Turtle & Want, 2008, p. 1255).

Performance Bias

Greenhaus and Parasuraman (1993) have argued that bias is a key determinant in the relatively slow career advancement of ethnic minorities, and that this is reflected in the performance evaluation process. They state two common forms of performance evaluation bias: Appraisal bias and attributional bias.

Appraisal bias occurs when the performance level of minority group members is evaluated more negatively than their actual performance warrants (Kraiger & Ford, 1985). It is also apparent when the performance assessment of employees who are the same in terms of race, ethnicity or "immigrant" status is based on objective criteria, whereas employees who are different are evaluated on subjective criteria (e.g., Cox & Nkomo, 1990). Given the challenges of achieving objective performance appraisals, this can be difficult to establish; however, a recent review by Robertson, Galvin, and Charles (2008) confirmed the presence of rater bias in performance evaluations that disadvantaged workers from diverse minority groups. Attributional bias is more subtle and arises from supervisors' causal explanations for an employee's performance. For example, there is evidence that the positive performance of ethnic minority managers is less likely to be attributed to ability or effort and more likely to be attributed to help from others than the performance of "white" managers (Greenhaus & Parasuraman, 1993).

Both appraisal and attributional biases can affect promotion opportunities for new settlers and members of ethnic minorities. One way this is manifested is through differential determinants of promotion. Evidence of differential determinants has been provided by the Multi-City Survey of Urban Inequality, which was conducted in Boston, Atlanta and Los Angeles (Smith, 2005). After controlling for factors such as performance and commitment, the processes that led to promotion were found to differ for "white", African-American, and Hispanic or Latino American men. Compared to "whites", African-Americans were required to work for a longer period of time after leaving school, and Hispanic and Latino Americans had to demonstrate longer service to their current employer before gaining promotion.

Socio-Psychological Processes Underlying Bias

If we are able to identify *where* bias occurs, we can address concrete issues and organizational goals. If we are able to understand *why* bias takes place, we can counteract bias and increase the chances of equal labor market and organizational participation for diverse groups of people (UNDP, 2009).

Categorization and Comparison

Bias often arises because of the way we perceive and categorize people and the way we compare them to ourselves. Categorization is generally based on group membership, with ethnicity, nationality and “immigrant” status being particularly salient categories. The ways in which we process information about these categories is influenced by at least two major factors: (1) similarity, and (2) social identity (Tharenou, this volume).

Similarity and Dissimilarity on Individual, Organizational and Socio-Cultural Levels

On an individual level, people like to interact with each other if they expect favorable results from those interactions. Positive expectations are based on perceived similarities in attitudes, values and behavior (Byrne, 1971), generally arising from easily recognizable attributes, including demographic characteristics. In short, the similarity-attraction paradigm tells us that we like people who are like us, including those who share the same ethnic, national and linguistic background (Berry, 2006; Fuertes, Potere, & Ramirez, 2002).

Extended to an organizational context, Schneider’s (1987) model of attraction-selection-attrition cites similarity as a key predictor of entrance to, advancement in and departure from organizations (also, Carr, Chapter 7 this volume). Research has shown that relational demography, particularly ethnic and national similarity, lies at the root of selection and performance biases, as candidates and employees who are more similar to evaluators receive more positive appraisals (Goldberg, 2003; Purkiss et al., 2006; Tsui & Reilly, 1989). The significance of similarity has also been highlighted by conceptions of job and organizational fit (see also Case Study 2) where the perceived match between candidates’ attributes and employment criteria is important in determining selection. The lack-of-fit model has been applied to structural manifestations of discrimination through race- and ethnicity-typed occupations and explains differences in selection probability and salary as a function of the match between candidate ethnicity and the ethnic distribution of an occupation or organization (Stewart & Perlow, 2001).

Finally, the importance of similarity has been considered at the societal level in the discussion of “cultural distance” (Carr, Chapter 1 this volume; Furnham, this volume). International research has clearly shown that host nationals have more positive perceptions of those new settlers who are ethnically, culturally and linguistically similar to themselves (Berry, 2006; Coates & Carr, 2005; Ward & Masgoret,

2008). Host nationals are also more likely to recommend restricting new settlement for those who are dissimilar (Ho, Niles, Penney, & Thomas, 1994), which helps to understand why it is more difficult for some groups of people to find and maintain meaningful employment than others (see also Case Study 1).

Social Identity, Categorization and Comparison

Theories of Social Identity (SIT) (Tajfel & Turner, 1986) and Self Categorization (SCT) (Turner, Hogg, Oakes, Reicher, & Wetherell, 1987) explain social behavior as a function of one's own group membership(s) and the basic psychological needs of social identities (e.g., belongingness and positive distinctiveness) that are shared with a group of other people belonging to the same social category (Tharenou, this volume). "Surface-level traits" such as ethnicity are among the most useful attributes for categorizing oneself and others, as they are more or less visible and, hence, available, particularly when information about others' deep-level traits is unknown (Harrison, Price, & Bell, 1998). Categorization as an automatic cognitive mechanism leads to comparison, and the outcomes of these comparisons are colored by the motivation to cast our in-group in a favorable light. Indeed, it has been suggested that intergroup bias is an inevitable outcome of social identification and leads to implicit intergroup rivalries, out-group derogation, negative stereotypes, group-serving biases, distrust of out-group members and discriminatory behavior (Brewer, 1979; Greenwald et al., 2002).

There is ample evidence from national surveys that both ethnic and national out-groups, including new settlers, are evaluated less positively than in-groups (Berry, 2006; Ward & Masgoret, 2008). As seen in the previous sections, these in-group favoring appraisals are often carried into the workplace. Thus, SIT and SCT offer one explanation of the process by which similarity becomes a meaningful organizational construct and can function as the basis for bias and discrimination. SIT also addresses the role of stereotyping and attributions in biased evaluations.

Stereotypes and Attributions

Stereotypes involve widespread consensual beliefs about people in social categories. Out-group members are generally seen as more homogeneous and viewed less favorably than in-group members, but there can be exceptions to these trends. First-generation new settlers in the United States are stereotyped as less competent than their native-born peers, as are South Americans, Latinos, Africans, Middle Easterners and Eastern Europeans; however, East Asians (Koreans, Chinese, and Japanese) are perceived as more competent (Lee & Fiske, 2006). Ethnic and national stereotyping is likely to provide a partial explanation for bias in the selection and performance evaluations of new settlers.

Stereotypes are closely linked to causal attributions. Research has consistently shown that people interpret the behavior of others on the basis of in-group and out-group categories. More specifically, there is a strong tendency to attribute the

positive behaviors of in-group members to internal factors, such as ability, and negative behaviors to external factors, such as bad luck. The reverse is true for out-group members, which might explain why competent performances by minority group managers are less likely to be seen as an outcome of ability and effort. The absence of a “level playing field” in the workplace is reflected in the wider society where research has consistently demonstrated attributional biases on the basis of ethnicity (e.g., Fletcher & Ward, 1988).

Inter-Group Conflict, Competition and Threat

Bias, prejudice and discrimination are also known to arise as outcomes of realistic conflict and competition over valuable resources (Levine & Campbell, 1972). How does this occur? Both limited employment opportunities and scant access to economic benefits in organizations increase competition for selection and promotion. Resource scarcity, particularly when combined with zero-sum beliefs (the idea that more resources for other groups mean less opportunities for my group), encourages responses to gain the competitive edge. Biased judgments, self- and group-serving attributions and prejudiced attitudes can block organizational entry and advancement for out-groups. More overtly discriminatory behavior, such as intentionally restricting access to the labor market or introducing barriers to pay parity (Carr, Chapter 7 this volume), likewise serve to reduce or eliminate competition (Esses, Dovidio, Jackson, & Armstrong, 2001).

Research findings are clear: competition for economic resources is linked to anti-“migrant” attitudes and behaviors (UNDP, 2009, p. 51). Gallup polls in the United States have shown that the most negative attitudes toward new settlers occur during periods of recession (Esses, Dovidio, & Hodson, 2002). Israeli data indicate that labor market competition from foreign workers underpins widespread endorsement of economic discrimination (Semyonov, Raijman, & Yom-Tov, 2002). More broadly, Quillian’s (1995) analysis of the Eurobarometer public opinion survey data from 12 European countries found that poor economic conditions coupled with large new settler numbers predicted negative attitudes towards new settlers. There is also evidence from the United States and Canada that national unemployment rates are associated with a preference for decreasing new settlement (Espenshade & Hempstead, 1996; Palmer, 1996).

Perceived threat has also been used to interpret findings on bias and discrimination. Integrated Threat Theory posits that there are four fundamental threats that lead to unfavorable attitudes toward new settlers: realistic threat, symbolic threat, intergroup anxiety and negative stereotypes (Stephan, Ybarra, Martínez, Schwarzwald, & Tur-Kaspa, 1998). Realistic threats refer to tangible threats arising as a result of scarce resources, while symbolic threats concern differences in norms, beliefs and values that constitute a threat to the in-group’s worldview. Negative stereotypes provide an overarching schema for threatening expectations about out-group members, and intergroup anxiety arises from the threat of being rejected, embarrassed, ridiculed or exploited in intergroup interactions. There is persuasive evidence from survey research in Spain, Israel, New Zealand and the United

States that each of these four threats predicts negative attitudes toward new settlers (Stephan et al., 1998; Ward & Masgoret, 2006).

The Influence of Personal Factors

Individual differences often underpin bias and discrimination. Right-wing authoritarianism and low self-esteem have been implicated in prejudice and shown to predict racism and xenophobia, including anti-new settler sentiments (Duriez & Soenens, 2006; Leong, 2008). Personal values are also related to attitudes toward new settlers; those who strongly value security and achievement tend to have more negative attitudes toward new settlers while those who value stimulation view new settlers more positively (Leong, 2008). It is important to recognize the influence of both personality and values on attitudes toward new settlers because negative and prejudicial attitudes are known to affect employment decisions (Brief, Dietz, Cohen, Pugh, & Vaslow, 2000; Stewart & Perlow, 2001) and performance assessments adversely (Tomkiewicz, Brenner, & Adeyemi-Bello, 1998).

Personal beliefs and ideologies are also important. Social Dominance Orientation (SDO), the belief that group hierarchies are desirable and competition is inevitable, leads to negative attitudes towards new settlers in society (Esses et al., 2001; Ward & Masgoret, 2006). In the organizational context, SDO has been found to be at the root of bias and discrimination in selection processes, with those higher in SDO less likely to choose candidates from minority backgrounds (Umphress, Simmons, Boswell, & Triana, 2008). In opposition to SDO is a multicultural ideology, the “general and fundamental view that cultural diversity is good for a society and for its individual members and that diversity should be shared and accommodated in an equitable way” (Berry, 2006, p. 728; and Berry, this volume). Multicultural ideologies promote greater acceptance of new settlers and diminish the willingness to exclude them on the basis of their numbers or countries of origin (Berry, 2006; Ward & Masgoret, 2008).

The Influence of Situational Factors

Intercultural Contact

Amongst the most important situational predictors of anti-new settler bias are the amount and quality of contact between new settlers and their native-born peers. Although there are occasional examples of greater contact leading to more negative intergroup perceptions (e.g., Stroebe, Lenkert, & Jonas, 1988; Maynard et al., this volume), Pettigrew and Tropp’s (2006) meta-analysis found that contact per se has beneficial effects in reducing prejudice, that the link from contact to attitudes was stronger than from attitudes to contact, and that contact in work and other organizational settings produces the strongest effects. The positive consequences of inter-group contact are also enhanced under optimal conditions; that is, equal

status, voluntary, pleasant, intimate and cooperative encounters. However, in light of vertical segregation in organizations, equal status contact between majority and minority groups is difficult to achieve (Maynard et al., this volume).

Contact can lead to prejudice reduction in a variety of ways. Italian research has shown that contact decreases intergroup anxiety and leads to more positive attitudes toward new settlers (Voci & Hewstone, 2003). Contact has also been demonstrated to reduce cultural stereotyping of Asian new settlers in New Zealand (Singer, 1998). Finally, contact can lead to reductions in both perceived threat and zero-sum beliefs, which in turn predict more positive attitudes toward new settlers and, subsequently, stronger endorsement of new settlement policies pertaining to the source and number of new settlers (Ward & Masgoret, 2008). Such changes in attitudes, perceptions and beliefs should at least indirectly decrease the likelihood of bias in the workplace.

Apart from the potentially positive effects of inter-cultural contact on interpersonal relationships, structural aspects within occupations and organizations need to be considered as they lay the ground for the specific dynamics of interpersonal and intergroup contact in the workplace setting. Structurally speaking, members of a minority group are more likely to interact with members of the majority group than vice versa. While this may positively impact the perspectives of minority group members, the prejudices, negative stereotypes and discriminatory behavior displayed by the majority group are likely to remain unchanged (Blau, 1977). Consequently, interpersonal interactions may lead to positive personal experiences, while at the same time structural manifestations of inequalities within organizations prevail and continue to be reinforced (UNDP, 2009, p. 5).

Workforce Demographics and Group Composition

It becomes clear that the quantity and quality of intercultural contact are influenced by structural manifestations expressed in work force demographics and composition. Questions of group size, minority and majority positions and potential token status all influence inter-group behavior and moderate the influence of contact on the reduction of prejudice and discrimination.

“Fault lines” have been used as a metaphor to interpret the increase in bias and conflicts that arises in conjunction with shifting proportions of organizational groups that are differentiated on the basis of ethnicity, nationality or “immigrant” status (Lau & Murnighan, 2005; Lemieux & Pratto, 2003). Fault lines within a work group or a workforce are more likely to develop when little variation exists within a social category. For example, fault lines should form more easily in bi-national than multinational work groups, as there is little variation in nationality. They are even more likely if they coincide with sector or department divisions. In contrast, positive cognitive and affective consequences are more probable in highly heterogeneous teams (Earley & Mosakowski, 2000; Podsiaclowski, 2002a), when the multiple perspectives within the group are appreciated and mutual learning is possible, particularly if co-operation is long-term.

Overall, the dynamics of workforce demographics and group composition differ according to how many people belong to the same cultural group and how many cultural groups are represented within the organization. A higher and quickly increasing representation of people of one cultural background within a formerly homogeneous workforce will increase the likelihood of intergroup competition, perceived threat and fault lines, whereas a highly heterogeneous workforce with representatives of different nationalities will pose the challenges of coordination and logistics, but make unbiased cooperation more probable. Additionally, if there are only very few members of a minority group (e.g., due to nationality and/or “immigrant” status), they may face the negative effects of “token” status (Kanter, 1977). “Tokens” are more visible and more likely to be treated as representative of social groups, leading to greater polarization between majority and minority group members, exaggerated differences between groups and reinforced boundaries (fault lines).

Societal-Level Attitudes and Perceptions of New Settlers

Organizations are microcosms of the wider society and reflect the patterns of bias and discrimination found at the societal level. Recent data from the European Union showed that 62% of Europeans believe discrimination on the grounds of ethnic origin is widespread, but there are marked differences across countries (European Commission, 2008). At least 75% of nationals from the Netherlands, Greece, Italy, France, Sweden and Denmark agreed with this proposition, contrasted with 23% of Lithuanians, 27% of Latvians, 28% of Poles and 34% of Bulgarians. When taken into the workplace, 42% of Europeans believed that skin color or ethnic origin disadvantages job candidates, and managers were more likely to agree that these factors put candidates at a disadvantage than the average European. National ideologies (e.g., pluralism versus assimilation) and beliefs about state unity, new settlement rates, sources and policies, the extent of within-society cultural diversity, human rights legislation, media representations and national values have all been suggested to underpin societal attitudes toward new settlers (Bourhis, Moïse, Perreault, & Senécal, 1997; Leong & Ward, 2006; Vedder, van de Vijver, & Liebkind, 2006), and thus at least indirectly affect their positions in the workforce. However, recent international comparative data have demonstrated more direct links. Specifically, national policies on new settlement and diversity predict the extent to which organizations implement action programs for ethnic minorities (Podsiadlowski & Reichel, 2009).

Counteracting Bias in the Workplace

With increasing global mobility the imperative to develop strategies to counteract employment bias and discrimination has grown even stronger. Most noteworthy is the pressing economic need to ensure that receiving countries and organizations

benefit from the skills and talents that new settlers bring. Mobility is a factor contributing not only to the economic growth in receiving societies but also to the development of sending states (Nyberg-Sorensen, van Hear, & Engberg-Pedersen, 2002). There are additional concerns for the social inequalities that result from bias and discrimination, as these present impediments to new settler integration and undermine national cohesion in culturally plural societies (Ward, 2009). The effects of bias are also detrimental on the individual level where perceived discrimination and new settler unemployment have been linked to physical and mental health problems (Akhavan, Bildt, Franzén, & Wamala, 2004; Jasinskaja-Lahti, Liebkind, & Perhoniemi, 2007; Hernández-Plaza et al., this volume), fragmented transnational families (Aye & Guerin, 2001) and negative work-related outcomes including lower organizational commitment and job satisfaction (Ensher, Grant-Vallone, & Donaldson, 2001; Florkowski & Fogel, 1999).

As the costs of employment bias are high, it is important that strategies be put in place to facilitate the integration of new settlers and counteract workplace discrimination (UNDP, 2009). Considering the relevance of perceived similarity and in- and out-group differentiation, bias may generally be overcome via: (i) de-categorization (viewing others as unique individuals through increased, interpersonal interactions leading to individuating information), (ii) re-categorization (including everybody within a larger category by developing a common group identity (Gaertner & Dovidio, 2000)), and (iii) mutual differentiation (valuing each other's differences and reaping the advantages of diversity by setting strong, common goals that make complementary roles necessary (Otten & Matschke, 2006)). Generally speaking this means that: (i) mutual contact and increasing familiarity should improve interpersonal and intergroup relations by reducing prejudice, stereotypical group images, misleading attributions and negative perceptions, (ii) common goals and co-operative inter-dependence should provide a context for breaking down barriers to communication and exploiting the benefits of diverse skills and perspectives (Brewer, 1995; Maynard et al., this volume), and (iii) supporting multicultural ideologies at the societal, organizational and individual levels (Berry, this volume). If it is possible to shift views about competition for limited resources to an understanding of the mutual *benefits* of cultural diversity – including enhancing a multi-lingual atmosphere, bringing international perspectives and experience, and providing cultural knowledge and new ideas that address the demands of an increasingly diverse business environment – perceptions of symbolic and realistic threat as well as inter-group anxiety should logically and psycho-logically decrease (Maynard et al., this volume).

Organizations should function as safeguards and specifically work on counteracting bias through de-categorization, re-categorization and mutual differentiation via political and structural measures and by changes in human resource management and leadership practices. Positive interpersonal contact can be increased via orientation sessions for new and old employees, provision of culturally specific information, cultural awareness training and the support of multicultural teams to diminish the likelihood of prejudice, negative stereotypes and group-serving attributions. Managers are key agents of change and should be trained

to function as role models, particularly if they come from a new settler and minority ethnic background themselves. As managers are also primary decision-makers, it is important that they ensure structured processes of selection and performance appraisal and other culturally sensitive practices that suppress stereotypes and superfluous business justifications and reduce ethnic homogeneity. These strategies may include the introduction and supervision of advocacy groups and diversity task forces and the use of opinion surveys, all of which provide means of giving voice to different groups of people and allow them to raise concerns and make implicit knowledge explicit (Bhawuk, Podsiadlowski, Graf, & Triandis, 2002; Podsiadlowski, 2002b; UNDP, 2009).

Super-ordinate targets that encourage compliance and a strong organizational culture should help to diminish the risk of perceived threat and sub-group differentiation based on work-irrelevant categories like nationality and ethnicity (Maynard et al., this volume). In the case of mutual differentiation, diversity can be seen as an asset, reinforcing multicultural viewpoints and creating intercultural synergies. This would mean the active and official promotion of diversity goals, the reward of diversity-friendly behavior, the appreciation of diverse viewpoints, the monitoring of movements in and out of organizations and the integration of diversity issues into existing training programs.

As a diverse workforce with a balanced representation of members of different social groups is only possible in light of unbiased recruitment and selection, all instruments used for recruitment, selection, compensation and promotion need to be checked for cross-cultural applicability and validity in their development and implementation. Mixed assessment panels and multiple methods and ratings are advisable to take advantage of diverse perspectives and culturally sensitive knowledge (Carr, Chapter 7 this volume). This also avoids reliance on rating criteria that reinforce homogeneity and the ethnocentric interpretations of observable behavior.

In the end, counteracting bias in organizations not only leads to positive health and wellbeing for members of a diverse workforce, it also creates a less stressful workplace and a more positive, engaging and productive work environment for *all* employees (Ensher et al., 2001; Sanchez & Brock, 1996). Furthermore, under the appropriate conditions, organizations can reap benefits from a culturally diverse workforce, and societies can benefit from the skills and talents that new settlers bring in an era of global mobility. As summarized by Chemers (2007, p. 663):

Fair and effective practice in pursuit of organizational diversity is more than a moral demand. It is a matter of organizational success and national survival. No organization or nation can be successful within the context of global competitiveness if it limits its pool of leadership talent... Organizational justice is a boon which manifests in more talented and more motivated employees which, in turn, influences all the bottom lines.

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Chapter 15

Technology, Mobility, and Poverty Reduction

Lori Foster Thompson and Stephen G. Atkins

Abstract Information and Communication Technologies have had undeniable effects on global mobility. They not only facilitate the international mobility of goods, money, and people, they also enable the rapid, often instantaneous, transmission of thoughts, ideas, and data across the world, rendering knowledge, information, and networking opportunities essentially borderless. Depending on how they are cultivated and used, these trends can accelerate or impede efforts to advance peace, justice, and wellbeing. This chapter considers the implications of Information and Communication Technologies for global mobility and poverty reduction. First, the authors describe the technological climate in which developed and developing nations now operate. Trends and disparities in Internet usage are discussed, along with emerging changes that characterize contemporary Internet practices. The concepts of brain drain, gain, and circulation in today's technology-infused society are then considered. Two points addressed in this discussion concern (i) the effects of Information and Communication Technologies on global mobility and (ii) how Information and Communication Technologies can change – perhaps even reverse – the effects of mobility on global inequalities. Finally, the authors emphasize technology's potential to positively influence the world of aid and development by highlighting several promising initiatives which illustrate innovative uses of technology to promote humanitarian objectives. A key point conveyed throughout this chapter is that technology, if implemented effectively, has the potential to act as a social leveler by creating opportunities for all, particularly those who risk being left behind and being further marginalized. Accomplishing this aim requires active participation from a range of professionals, including psychologists, who are well-trained to deal with issues pertaining to technology acceptance, usability, virtual collaboration, and other aspects of computer-supported cooperative work. Expertise in areas such as these is essential if technology is to reduce poverty and turn global mobility into a source of “information gain” for impoverished regions of the world.

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Keywords Brain drain · Information and communication technology · Poverty reduction · Web 2.0

Abbreviations

CSR	Corporate Social Responsibility
GIS	Geographic Information Systems
GPS	Global Positioning System
ICSSD	International Committee for Social Science Information and Documentation
ICTs	Information and Communication Technologies
MSF	Médecins Sans Frontières
R&D	research and development
SmartAid: CWC	SmartAid: Consultants without Costs
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
WSIS	World Summit on the Information Society

Information and Communication Technologies have had undeniable effects on global mobility. ICTs not only facilitate the international mobility of goods, money, and people, they also enable the rapid, often instantaneous, transmission of thoughts, ideas, and data across the world, rendering knowledge, information, and networking opportunities essentially borderless. Depending on how they are cultivated and used, these trends can accelerate or impede efforts to advance peace, justice, wellbeing, and progress towards what have come to be known as the Millennium Development Goals, and human development generally (UNDP, 2009). The Millennium Development Goals are eight imperatives which were articulated at the turn of the century and agreed upon by countries and development institutions throughout the world. These goals address critical global needs and include the objective of halving extreme poverty by the target date of 2015 (Carr, 2007).

This chapter considers the implications of Information and Communication Technology for global mobility and poverty reduction. On the whole, it is difficult if not impossible to determine technology and mobility's aggregate influence on poverty. Emerging Information and Communication Technologies allow people to organize, network, collaborate, and conspire for good or evil. Technology facilitates the collection and dissemination of information that can be used to reduce or exacerbate global poverty. Our focus in this chapter is not to provide a balance sheet to determine whether the Internet has produced net gains or losses in the humanitarian aid arena; rather our purpose is to discuss some of the important issues involved in the complex interactions among technology, mobility, and global human development. We also endeavor to highlight innovative ways in which emerging Information and Communication Technologies may be used to reduce poverty.

Two specific issues addressed in this chapter concern (i) the effects of Information and Communication Technologies on global mobility and (ii) how

Information and Communication Technologies can change – perhaps even reverse – the effects of global mobility on global inequalities. A key point we wish to convey is that technology, if implemented effectively, has the potential to act as a social leveller by creating opportunities for all, particularly those who risk being left behind and being further marginalized (WSIS, 2003). Accomplishing this aim requires active participation from a range of professionals, including psychologists, who are well-trained to deal with key issues pertaining to technology acceptance, usability, virtual collaboration, and other aspects of computer-supported cooperative work (Coovert & Thompson, 2001). Expertise in areas such as these is essential if technology is to reduce poverty and turn global mobility into a source of “information gain” for impoverished regions of the world.

The following pages expand on the issues suggested above. First, we describe the technological climate in which developed and developing nations now operate. Trends and disparities in Internet usage are discussed, along with emerging developments that characterize contemporary Internet practices. The concepts of brain drain, gain, and circulation in today’s technology-infused society are then considered. Finally, we emphasize technology’s potential to positively influence the world of aid and development by highlighting several emerging initiatives which illustrate innovative uses of technology to promote humanitarian objectives.

Today’s Information and Communication Technology Landscape

Access Trends

We live in an increasingly digital, global society. Since its commercial debut, the Internet has met saturation levels throughout the developing world that earlier Information and Communication Technologies, such as landline telephones and televisions, never managed to reach (Duque, 2008). By some accounts, nearly 24% of the world’s population is now connected to the Internet, which translates into a vast 1,596,270,108 Internet users worldwide (Miniwatts Marketing Group, 2009). Recent estimates suggest that the percentage of the population which uses the Internet rose by a rate of 342% between 2000 and 2008 alone (Miniwatts Marketing Group, 2009). Meanwhile, there is general consensus that the technological revolution is still in its infancy (Pick & Azari, 2008), with Internet access and utilization expected to grow dramatically in the years to come.

With the increasing bandwidth needed to function online today, access to *high-speed* connections is particularly important. Broadband networks are said to be as critical in the twenty-first century as were interstate highways and basic telephone networks in the twentieth century and roads, canals, and railroads in the nineteenth century (Bouras, Giannaka, & Tsiatsos, 2009). Accordingly, broadband penetration is a metric commonly used to track the Internet’s rate of progression. The term “broadband penetration” refers to the percentage of the Internet access market with high-speed or broadband connectivity (Smith, 2009).

Clearly, not all parts of the world are characterized by equivalent rates of penetration and growth. Commonly referred to as the “digital divide”, worldwide disparities in the availability and use of technology are apparent (Pick & Azari, 2008). For instance, less than 6% of Africa’s population is reportedly connected to the Web, with most subscribers residing in North African countries and the republic of South Africa (Miniwatts Marketing Group, 2009; Nixon, 2007). Rates of Internet adoption are considerably higher in other parts of the world, with estimates ranging from 17% (Asia) to 74% (North America; Miniwatts Marketing Group, 2009). In general, the digital divide is believed to stem from differences in access (connectivity, costs), skills (digital literacy) and content (localization of content) within and across regions of the world (UNCTAD, 2007).

Although developed economies remain ahead in terms of Internet penetration, developing economies are catching up (UNCTAD, 2007). In 2002, Internet penetration was 10 times higher in developed economies than in developing economies. Four years later, this gap had narrowed, with Internet penetration rates in developed economies reported to be six times higher than corresponding rates in developing economies (UNCTAD, 2007). Nevertheless, concerns about the digital divide persist, based on the premise that gaps in access to information flows increase the vulnerability of populations in the developing world (Alampay, 2006; Chinn & Fairlie, 2006; Duque, 2008). Such concerns have prompted two World Summits on the “Information Society,” private sector interest in emerging markets, and sizable donor investments in infrastructure focused on increasing the connectivity of developing countries (Duque, 2008).

Three illustrative efforts to narrow the digital divide are worth mentioning. One noteworthy initiative involves attempts to bring fiber optic cables to Africa. At the time of this writing, more than 500 such cables link the developed world, with Africa connected by only ten. East Africa is the last area on earth with none at all. According to recent reports, however, several companies have joined efforts to address this issue, with cables to East Africa due for completion by the end of 2010 (Wood, 2009). Second, a new initiative was introduced in 2008 to provide high-speed Internet access to the Dominican Republic’s rural areas, where 1.5 million people are estimated to be without broadband access (“Rural Net Scheme,” 2008). Third and finally, the scientific community has proposed VillageNet as a new wireless mesh networking technology, which can provide low-cost broadband Internet access for wide regions (Dutta, Jaiswal, & Rastogi, 2007). VillageNet may offer a high performance, low cost alternative in certain areas of the world, where more traditional Internet connections are cost prohibitive.

Of course, broadband penetration may not be the only solution for equalizing access to information flows. The United Nations Conference on Trade and Development’s (UNCTAD) 2007–2008 Information Economy Report points to mobile phones as a mechanism to help bridge the connectivity gap between developing countries and their wealthier counterparts. The number of mobile phone users in developing countries almost tripled from 2002 to 2006. As a result, mobile phone subscribers in developing countries are now nearly twice as many as in developed economies (UNCTAD, 2007).

Utilization Trends

While Internet prices, speed, and access are improving, the way that people use information and communication technology is shifting. A number of contemporary computing trends have implications for global mobility and poverty reduction. This chapter highlights three: (i) the miniaturization of advanced computing technologies, (ii) Location-Based Services such as the Global Positioning System (GPS); and (iii) the movement toward Web 2.0 technologies.

The first noteworthy trend pertains to miniaturization. Today's technological landscape is marked by lightweight laptops, mobile phones, miniature music players, personal digital assistants, digital cameras, web cameras, and a host of small devices which serve a variety of functions simultaneously. The range of portable, wireless, handheld, and even wearable mobile computing devices on the market today make it increasingly easy for users to create, share, and retrieve information on demand. These devices enable "just in time" access, which is important considering the vast and ever-growing volume of information available to the computer user.

Location-Based Services such as GPS represent a second trend worth emphasizing. During the past few years GPS has entered the mainstream, with more and more people relying on it to accomplish their personal and professional goals (Sadoun & Al-Bayari, 2007). GPS operates through dedicated devices as well as miniature mobile technologies (e.g., phones, watches), such as those discussed above.

A third computing trend of interest involves a fundamental shift in the way in which people now use the Internet. Over the past 15 years, the World Wide Web has evolved from a work group tool for scientists into a global, shared information space with more than a billion users (Anderson, 2007). The last 2–3 years in particular have marked a radical "step change" in the nature of the Internet (Hemmi, Bayne, & Landt, 2009; Ravenscroft, 2009), which has moved from a series of relatively static HTML pages to a more dynamic space characterized by open communication, information sharing, and Web-based communities ("Web 2.0," n.d.).

This dynamic Internet space has been dubbed "Web 2.0". Coined in 2004, the term "Web 2.0" refers to a second generation of Web-based communities and hosted services which facilitate sharing and collaboration among users (Anderson, 2007; Shin & Kim, 2008). Otherwise known as "social software" (Ravenscroft, 2009) or the "read/write web" (Hemmi et al., 2009), Web 2.0 technologies commonly allow people to construct and disseminate rich media content quickly and easily (Lee, McLoughlin, & Chan, 2008). This second generation Internet tends to be not only a social trend, but also an economic one (Zeng & Bell, 2008), with still-increasing amounts of commercial activity.

At the time of this writing, tools falling under the rubric of Web 2.0 include social networking sites, multimedia sharing services, blogs, wikis, content syndication, content tagging services, folksonomies, hosted services, podcasting, RSS feeds, social bookmarking, streaming audio and video, tagging, Webinars, and online 3D virtual worlds (Anderson, 2007; Colley, 2008; Cronin, 2009; Lee et al., 2008; McGee & Begg, 2008; Shin & Kim, 2008). Popular manifestations of contemporary

Web 2.0 technologies include Facebook, MySpace, LinkedIn, Flickr, Second Life, YouTube, and Twitter. Over a year ago, YouTube was estimated to have more than 60 million active users, with Facebook's numbers exceeding 69 million (Levy, 2008). By May 2009, Facebook's user base was estimated at 175 million, with more than half of its members outside of college (Hawkins, 2009). The somewhat newer Twitter phenomenon is also gaining steam. Described as "microblogging", or a cross between blogging and instant messaging, Twitter is an online service used to transmit and receive short (140 characters or less) notes to and from the world via a personal computer or mobile phone (Grossman, 2009). Twitter's site expanded at a rate of 1,382% in February of 2009 alone, and traffic to Twitter jumped 43% from April to May of 2009 (Diamond, 2009).

The productivity and economic implications for these extreme growth rates in social media uptake have garnered substantial media attention. However, less consideration has been given to the impact of these social media innovations on global mobility patterns. As discussed next, global mobility is often pursued to remedy or reduce one's impoverishment. In this context, the evolution and use of Information and Communication Technologies have important implications for global poverty reduction.

Implications for Brain Drain, Gain, and Circulation

In general, the forces driving international mobility can be considered at different levels of analysis. At the individual level, for example, personal traits and attitudes as well as family- and career-related factors shape decisions to move (Carr, Inkson, & Thorn, 2005; Ferro, 2006; Mahroum, 2000). Governmental policies (e.g., on immigration rules), education, taxes, political changes, civil war, and threats of persecution or genocide, are broader, macro-level variables that also influence decisions to relocate outside one's country of origin (Carr et al., 2005; Cervantes & Guellec, 2002; Collier & Hoeffler, 2004; Kaukab, 2005; Mahroum, 2000). Different groups of highly-skilled professionals (e.g., engineers vs. executives vs. scientists/academics) are said to be driven and lured by distinct motivations (Mahroum, 2000; Part Two, this volume). Overall, the range of "push" and "pull" factors at play are varied and complex. They continue to be debated in the literature.

Similarly, the consequences of global mobility have received a great deal of attention. Again, the outcomes of such global mobility, both positive and negative, can be considered at varying levels. Increased income, improved educational opportunities, personal safety, discrimination, difficulties gaining relevant employment, and weakened ties with friends and family back home are examples of individual-level consequences of the decision to relocate. However, it is the broader, macro-level effects of global mobility that have arguably received more press. A variety of popular catchphrases have been coined to describe some of the global outcomes that can result from global mobility across borders. *Brain drain* describes the phenomenon in which a nation's "best and brightest" move to other – often more affluent – regions

of the world. Brain drain implies that expensively trained and economically valuable individuals with vital skills are exiting a region at a greater rate than is normal or desired. It also suggests that the net flow of talent is heavily tilted in one direction so that one region's loss is another's benefit (Davenport, 2004; Mahroum, 2000), thereby widening the gap in relative capacity. The argument is that a receiving country which profits from the inflow of talent at the expense of another can incur a notable comparative gain, thereby increasing the developmental gap in favor of the receiving country and magnifying the push and pull forces that motivate brain drain in future generations (Duque, 2008). According to Glavan (2008), "physical capital goes hand in hand with human capital . . . consequently productivity will decline in the origin countries, creating further incentives for skilled emigration to developed regions. A vicious cycle can result, and this might explain why less developed nations remain poor" (p. 734).

Another unfortunate consequence has to do with the unfulfilled promise of expatriated human capital once abroad, which results in what is commonly regarded as *brain waste* (Duque, 2008). This happens when new settlers' skills are underutilized in their new country (Carr et al., 2005). Brain waste, for example, occurs when people qualified as doctors in their home country take jobs as taxi drivers in the West after being forced to leave their country of origin for fear of persecution ("EMs: The Rising," 2006).

The relocation of human capital does not always engender negative outcomes, however. The term *brain exchange* suggests a two-way flow of talent between a sending and a receiving region or country (Mahroum, 2000). Some have argued that the global competition for talent means that the flow of "skilled migration" is no longer unidirectional (Davenport, 2004). However, it is important to distinguish between new settlers from developing countries and those from Organization for Economic Cooperation and Development (OECD) countries (Cervantes & Guellec, 2002). Clearly, some regions (e.g., the UK) are more likely than others (e.g., Russia, Eastern Europe) to see talent flowing in as well as out (Mahroum, 2000). *Brain circulation* is an alternative label that has been applied to this bi-directional flow of talent (Davenport, 2004); however, this term is somewhat ambiguous because it has also been used to describe "reverse migration" (i.e., the return of expatriated human capital; Duque, 2008), as well as collaborations between off-shore Diasporas (that is, groups of expatriates living abroad) and individuals remaining in their homeland of origin (Patterson, 2006). The ambiguous terminology notwithstanding, "reverse migration" holds the potential for expatriates to gain valuable resources, networks, education, and skills abroad and then apply them to the country of origin upon their return ("Africa: Brain Drain," 2005). Estimates indicate that half of the Internet-based ventures in China, for example, were started by returning overseas students (Cervantes & Guellec, 2002).

It should also be noted that the existence of off-shore Diasporas opens the door for cross-border collaborations and transnational networks that provide avenues for the *long-distance* infusion of expatriates' knowledge, skills, and networks into the country of origin (Duque, 2008; "EMs: The Rising," 2006; "Home Sweet Home," 2005). And knowledge, skills, and networks are not the only long-distance resources

of interest. Expatriates also contribute financial capital from a distance through investments in the country of origin and by sending money (i.e., “remittances”) back home (Cervantes & Guellec, 2002; “EMs: The Rising,” 2006; Kaukab, 2005). Reports suggest that in certain countries, such as Tonga, Haiti, Jordan, and Nicaragua, remittances account for more than 20% of the gross domestic product and greatly exceed funds received through official development assistance or foreign portfolio investment (“EMs: The Rising,” 2006; Naim, 2002). While some have expressed concern over the utilization of such finances and see remittances as a barrier to national development, others view remittances as an economically favorable phenomenon which helps launch and sustain small family businesses and which gives the poor in recipient countries better access to basic facilities, including health and education services (Kaukab, 2005; UNCTAD, 2007).

In general, the costs and benefits of international global mobility – only some of which are discussed above – remain a hotly debated topic in a number of professions and countries around the world (Cervantes & Guellec, 2002; Davenport, 2004; UNDP, 2009). The effect of Information and Communication Technologies on the global flow of talent, however, has not received a great deal of empirical consideration (Duque, 2008; Inkson & Thorn, this volume). In some ways, one could reason that today’s Information and Communication Technology tools and technologies render global mobility less necessary than ever before. In effect, technology may both slow mobility down and speed talent outreach up. Information and Communication Technologies allow those remaining in their country of origin to maintain relationships from a distance, potentially reducing the pressure to follow relatives who have resettled far away in order to restore or sustain family ties. Professionally, technology also enables local access to worldwide resources. With the proper skills and technologies in place, people from developing areas can access overseas education, libraries, information, experts, networks, and funding without leaving their home country. As discussed by Ferro (2006), Information and Communication Technologies have also helped create a context in which not only workers, but also companies, are internationally mobile. The global outsourcing of information-based jobs from developed to developing economies can provide employment options previously unavailable to those who do not emigrate (Duque, 2008; Ferro, 2006). Such opportunities may involve on-site jobs in a “brick and mortar” workplace, or they may entail “online virtual migration” (Ferro, 2006, p. 173) – that is, telecommuting to an off-site job or organization without leaving one’s home base. In short, Information and Communication Technologies and globalization have opened new doors, granting those who choose to remain in their country of origin access to opportunities that used to require relocation.

At the same time, Information and Communication Technologies have reduced some of the traditional barriers to international mobility. As noted, ICTs help expatriates maintain virtual transnational relationships with friends, family, and colleagues back home. The prospect of sustaining relationships from a distance reduces a significant cost traditionally associated with relocation. Information and Communication Technologies also increase access to information concerning economic and educational opportunities abroad (Duque, 2008). Through the Internet,

“prospective emigrants” can readily research, explore, and identify degree programs and job openings that fit their skill sets and needs. Moreover, they can apply from a distance. Internet-based applications and screening processes are now commonplace in a number of educational institutions and work organizations, allowing people to compete for positions from the comfort of their own computers, regardless of whether those computers are located 5 miles or 5,000 miles from the educational or employment site of interest. Barriers to relocation are further reduced as the Internet helps ease preparation for global mobility by providing easy access to information regarding visa requirements, by allowing people to explore accommodation options and establish lodging from a distance, and in some cases by helping people digitally extend their social networks prior to relocating (Duque, 2008). Coupled with the increasing accessibility of air travel (“EMs: The Rising,” 2006; Jackson et al., 2005; Naim, 2002), these conveniences have raised questions about whether Information and Communication Technologies might actually streamline the path to global mobility. Instead of slowing the global flow of talent, the Internet could function as a focused conduit for brain drain, especially for individuals from those developing nations with the most advanced Internet infrastructure (Duque, 2008).

A major issue of relevance to this chapter moves beyond the question of how Information and Communication Technologies affect the *propensity* to relocate or remain in one’s country of origin. Instead, it deals with how Information and Communication Technologies might alter the *effects* of international global mobility when and if it does occur. As discussed earlier, global mobility has traditionally been associated with outcomes such as brain drain, brain exchange, and the like. Do Information and Communication Technologies strengthen the link between mobility and undesirable outcomes such as brain drain? Or do they increase the probability of global benefits when people relocate to another country?

At present, it is difficult to find examples of Information and Communication Technologies increasing the likelihood that mobility will result in detrimental outcomes such as brain drain. At worst, Information and Communication Technologies may have no moderating effect on the relationship between mobility, global development, and poverty reduction. At best, ICTs may actually reduce the negative and increase the positive consequences of international mobility. Two examples illustrate this contention. First, Information and Communication Technologies have reduced the cost to new settlers of delivering remittances to families back home. As described in the United Nations Conference on Trade and Development’s (UNCTAD) 2007–2008 Information Economy Report, expatriates are increasingly relying on Internet banking and mobile phones as a means of transferring money between countries (UNDP, 2009, p. 74). Mobile phones can even be used to send money to rural areas without bank branches and Internet connections (UNCTAD, 2007). Prior to the e-banking option, remitters commonly relied on informal intermediaries, which worked on the basis of trust and also charged high fees. Formal money transfer service providers hardly seemed like an attractive alternative; their fees were also initially quite high. The overall amount of remittances to developing countries has steadily risen as online transfer systems have helped both the originators and the end-users of the funds save money. Meanwhile, the competition

spawned by Internet banking has prompted major operators (e.g., Western Union, Moneygram) to reduce their fees, increasing the feasibility of this option as well (UNCTAD, 2007). In short, Information and Communication Technologies have helped transition and developing economies better capitalize on the wealth gained by expatriates living abroad.

Second, Information and Communication Technologies can help countries better capitalize on the combined knowledge, skills, networks, technical/institutional links, and intellectual resources of those who have moved away. The Internet and related technologies allow countries to harness the power of their Diasporas by facilitating expatriates' connections to each other and, in turn, their collective connection to their homeland. This entails establishing virtual meeting spaces or networks to organize and mobilize off-shore Diasporas by country of origin. Known as *digital Diaspora networks*, *Diaspora knowledge networks*, or simply *e-Diaspora*, these groups share the common objective of using their skills to contribute to the development of their members' place of origin (Duque, 2008; Meyer & Wattiaux, 2006). A number of these groups rely heavily on e-mail, listserves, and web sites to organize and communicate. Some owe their very existence to the Internet, functioning as pools of human resources which emanated from Information and Communication Technologies and survive solely through virtual connections (Meyer & Wattiaux, 2006).

E-Diaspora members' numerous activities to date illustrate the capacity of these new settler networks to mobilize the knowledge and skills available to them in their host countries for country of origin development (UNESCO, 2006). Example Diaspora knowledge network initiatives include the following (Meyer & Wattiaux, 2006):

- Exchanging technical, scientific, administrative, and political information with members of the home country;
- Transferring knowledge and expertise on topics of interest (e.g., waste management procedures) between individuals as well as institutions (e.g., universities) located in the host and home countries;
- Promoting the home country in the host country's research, development, and business communities;
- Virtually mentoring students located in the home country; and
- Providing consultation (e.g., peer review, technology assessment) on research and development projects.

Examples of early Diaspora knowledge networks included (a) a science and engineering-focused organization established by the Colombian community in 1991, and (b) a South African scholarly network instituted in 1998 in conjunction with the University of Cape Town (Meyer & Wattiaux, 2006). As the Internet has expanded in the years since then, so too has the presence of e-Diaspora networks. In 2006, Meyer and Wattiaux identified a total of 101 active networks. Acknowledging the likely existence of additional groups they did not uncover in their search, these

authors estimated that an exhaustive list of Diaspora knowledge networks probably exceeds 300 and covers a majority of non-OECD countries. Many of today's Diaspora knowledge networks have been grass roots efforts, such as an initiative in Latin America which was developed to link researchers abroad to networks in their home countries (Cervantes & Guellec, 2002). A growing number of networks are aiming to foster not only research and exchange programs, but also business links between those who have left and those who have stayed. For example, the Francophone Initiatives of African Women in France and Europe has contributed to micro-credit for women in places like Congo, Gabon, and Cameroon ("Home Sweet Home," 2005). Advanced countries have also implemented Diaspora knowledge networks. For instance, Swiss-List.com was established to encourage networking among Swiss scientists in the US and to foster contacts with peers in Switzerland (Cervantes & Guellec, 2002).

Certainly, the concept of utilizing expatriates' knowledge and skills for country of origin development is not new. However, Information and Communication Technologies offer the potential to greatly expand the strength and impact of off-shore Diasporas. By helping to capture know-how from new settlers overseas, Information and Communication Technologies can reduce the costs and increase the benefits of outward global mobility (Cervantes & Guellec, 2002). Whether e-Diasporas actually produce their intended effects in reality is a matter of debate. Skeptics lack confidence in these networks' consistency, sustainability, and usefulness. They question the efficiency and impact of e-Diaspora on the development of members' home countries (Lowell & Gerova, 2004). These types of debates have prompted a call for empirical work examining the impact of Diaspora knowledge networks on outcomes of interest (Meyer & Wattiaux, 2006). They have also led to an initiative known as the DKN project, which was created by the International Committee for Social Science Information and Documentation (ICSSD) for the United Nations Educational, Scientific and Cultural Organization (UNESCO). The stated purpose of the DKN project is "to supply UNESCO decision-makers with evidence justifying growing optimism in the idea that the mobility of the highly educated can provide their countries of origin with the skills and knowledge they need for development" (UNESCO, 2006, Project Description, para. 1). One distinguishing characteristic of the DKN project is its anchoring in social informatics – a research field in computer science that focuses on developing the technological tools needed to build and support social ties through the use of the Internet (UNESCO, 2006). This project could also benefit from participation by psychologists with expertise in human factors and virtual collaboration.

Looking ahead, empirical work designed to pinpoint the factors that contribute to the success or failure of e-Diaspora networks would be particularly fruitful. Such factors may involve particular modes of organization, socialization processes, and technological infrastructures. The latter of these three factors warrants special attention, as there is a sense that e-Diaspora have not made full use of the contemporary Information and Communication Technologies available to support interactive and effective collaborative practices (Meyer & Wattiaux, 2006). E-Diaspora knowledge networks surfaced in an era characterized by e-mail, listserves, and static web sites.

They developed and unfolded largely without the benefits of today's social media and second generation Internet. What would these networks look like if they had instead emerged in today's computing landscape marked by Web 2.0 technologies and related developments? New and existing Diaspora knowledge networks may benefit from meeting spaces and technological tools designed with this question in mind.

Innovating Poverty Reduction

It is difficult to cleanly separate the effect of Information and Communication Technologies on talent gains and losses in developing regions from their effects on development and poverty reduction. As suggested in the previous section, technology has the potential to influence worldwide development and poverty reduction by altering – perhaps even reversing – some of the deleterious consequences of global mobility and barriers to it (UNDP, 2009). Above and beyond these effects, there are many other ways in which Information and Communication Technologies can facilitate poverty reduction as well. A number of creative and innovative examples exist. Though an exhaustive list of these efforts is well beyond the scope of this chapter, we describe several initiatives below, to illustrate tools and practices that exploit emerging technologies to accomplish humanitarian and/or talent-enhancing objectives.

Information and Communication Technologies, Farming, and Global Development

Global Positioning Systems

As suggested earlier, GPS's role in mainstream computing has expanded in recent years. Some now consider GPS to be essential for targeting areas in need of trees or reforestation, as well as an important mechanism for monitoring forest growth (Environmental Systems Research Institute, 2009). This is noteworthy in light of the path blazed by Wangari Maathai, a Kenyan woman who won the 2004 Peace Prize for her Green Belt Movement, which links environmentalism to economic development, civic participation, peace, and human rights (Davis, 2006). Since its inception, the Green Belt Movement has engaged in a number of initiatives. In some cases, African villagers have received small sums for each planted seedling (e.g., banana, avocado, acacia) that survives for 3 months. As the Indigenous species mature, farmers receive more money by selling firewood and fruit, with enough seeds planted to provide firewood for their families and leave many trees standing (Davis, 2006). Involving farmers in forest management has reportedly generated more than income; it has also provided local communities with education in the sustainable use of watersheds (SciDev.Net, 2007).

Incorporating GPS into planting practices can enhance the impact of pro-social programs such as those described above. For example, the Green Belt Movement has begun giving small mobile GPS gadgets to local Kenyan farmers, who carry the devices around their fields. Every few paces, the farmers press a button to lock their positions. In this manner, they are able to map where they intend to plant trees and form tree nurseries. The Green Belt Movement interprets the data and turns it into practical advice. The data analysts produce a hard copy map which they take back to the farmers. Scientists work with the farmers to compute the number of trees that are going to fit in the site they want to rehabilitate (Martin & Cohen, 2009). While those involved with this project acknowledge the potential for accurate land mapping to prompt questions of ownership and subsequent conflict, there is a sense that using GPS for farming will ultimately result in positive outcomes which do more good than harm (Martin & Cohen, 2009).

GPS has found its way into other pro-social initiatives as well. For instance, the United Nations Environment Program and the Kenya-based Regional Centre for Mapping of Resources for Development have teamed up to use GPS to map areas of Kenya for forest cover, vegetation, and infrastructure for community education, and to enhance the sustainable use of forest resources (SciDev.Net, 2007). This effort and related initiatives illustrate how today's computing trends toward miniaturization and GPS can reduce poverty through high-tech farming practices.

Text Messaging and Web 2.0

Beyond GPS, there are a number of additional areas where Information and Communication Technologies and virtual expertise could combine to provide farmers with information on how to improve their livelihood and food productivity. For instance, mobile phones and text messages can be used by small rural farmers to send requests and get quick answers from experts (Martin & Cohen, 2009). In the past, rural farmers in Uganda have relied heavily on so-called "extension workers" to gather knowledge relating to their livestock and crops. Today, technology is said to be crucial in enhancing their production by providing regular information about their markets (Balakrishnan, 2008). Capitalizing on the power of mobile phones, information services have recently cropped up, which allow farmers and traders in agricultural commodities in Africa to conduct business through SMS text messaging. One example is TradeNet, which has been described as a simple sort of eBay for agricultural products in West Africa ("Africa Unplugged," 2007; "Buy, Cell, Hold," 2007). TradeNet was designed to allow buyers to send a text message requesting the price of a particular commodity from one or more countries of interest. Results are transmitted instantly. Meanwhile, traders can register to receive regular text message updates on commodities from markets of their choice (White, 2008). In this manner, technology functions as a conduit for "information gain".

Funded by the UN's International Trade Centre in Geneva, Trade at Hand is another mobile phone marketplace example. This service was created to supply daily price information for fruit and vegetable exports in Burkina Faso and Mali.

Also backed by aid money is a service offered by a telecoms firm based in Senegal, which imparts real-time agricultural and fish prices to fee-paying subscribers (“Buy, Cell, Hold,” 2007). With mobile phone usage more pervasive than computers in many African countries, these and similar initiatives are notable because they have employed technologies that are presently available instead of waiting for laptops and Internet connections to reach every rural African village (UNDP, 2009).

Emerging trends suggest that the market information systems described above will expand as ICTs and broadband penetration in developing countries improve. For example, TradeNet is now evolving into a more comprehensive service called Esoko, which has been developed to link farmers and traders online. Esoko has been described as an integrated platform that allows farmers to use both mobile phones and web pages to trade and to obtain a wide range of information linked to agricultural markets (e.g., prices, transport, weather, inputs availability). Esoko is designed to combine a traditional market price information system with a network approach, similar to Facebook, where members can post personal updates and follow what other members are doing. It also incorporates e-Bay type applications, such as rating systems which allow users to identify traders who consistently abuse their market positions. As people are using Esoko, the system will gather market information, in an effort to address current information gaps which impede planning and development (Magada, 2009). At present, many African countries lack sufficient systems for tracking and forecasting agricultural production and usage. In some cases, for example, there is no information on how much fertilizer has been used in one season, or how much maize has been planted.

In general, identifying opportunities to more fully exploit the interactive aspects of Web 2.0 technologies to benefit agriculture can have profound implications for global development. The search for innovative ways to apply Geographic Information Systems (GIS), GPS, Web 2.0, and other Information and Communication Technologies to farming and poverty reduction has piqued the interest of a number of forward-thinking groups. A website dedicated to helping nonprofit organizations make the most of GIS technologies has been established (<http://www.nonprofitgis.org/>). So have meetings aimed at extending discussions of the geographic web and its implications for agriculture and global development. One such event, which occurred in April of 2009, engaged geographers, mobile location experts, social cartographers, and others in discussions of these issues and their implications for Africa (Martin & Cohen, 2009; “WhereCampAfrica,” n.d.).

A particular challenge, according to some, is for the technology community to devise accurate yet simple answers that grass roots community members will understand (Martin & Cohen, 2009). Another ongoing challenge is to ensure rural community members have the technologies and connectivity needed to participate in this dialogue. Progress on this front is suggested by the initiatives described earlier and exemplified by a recent blog post titled “Did I just find a farmer from rural Africa on Twitter?” (White, 2008). A final challenge of note involves getting farmers to adopt and make full use of high-tech tools as they emerge. Psychologists with expertise in technology acceptance and training could help address this challenge.

Recruitment and Fundraising

Although the use of the Internet to recruit volunteers and raise funds is not new, emerging initiatives demonstrate innovative approaches, quite unlike their predecessors, which capitalize on Web 2.0 technologies. According to some reports, “social networks such as Facebook are fuelling a big shift in charity and fund-raising” (“CSR: Firms,” 2009, p. 1). The argument is that messages, logos, badges, pictures, and other media designed to persuade people to donate their time or money can travel quickly through social networking sites. In effect, constituents do the talking, spreading the word on behalf of the charity in question. It has been argued that such messages may be more persuasive if delivered via a friend’s blog or social networking site, rather than through a more formal or traditional medium (“CSR: Firms,” 2009).

One example of this approach is Twestival, an event launched in 2009, which drew on Twitter to raise money to bring clean water to people in developing nations. Twitter was used to spread the word and sell tickets to raffles and on-site gatherings scheduled to occur on a common date in more than 175 cities across the globe. Through this method, Twestival raised \$1 million for clean water in the space of a few short weeks (Leahul, 2009; “Twittering for Charity,” 2009).

Other aid organizations have worked to incorporate Web 2.0 technologies directly into their web sites in order to attract prospective donors and volunteers. For instance, humanitarian medical aid agency Médecins Sans Frontières (MSF) recently overhauled its web site to incorporate audio and video clips from field projects in Sierra Leone, Cambodia, and Niger. The newly revised website also includes mash-ups of Google Maps, which point out where aid activities are taking place. In addition, visitors are able to download a feed to update their Google Earth application with news from MSF. The next phase of the web site update aims to increase video and podcast content and add community elements which allows past volunteers to network with others (Goldie, 2008).

Virtual immersive environments such as video games and Second Life have been used in recent years to teach school children (Mitchell & Savill-Smith, 2004), train employees (Colley, 2008), solicit candidates for job openings (Steel, 2006), and recruit military personnel (Leland, 2009). Following suit, the United Nations’ World Food Program has developed a humanitarian video game, which was downloaded more than 800,000 times during its first six weeks online (Cole, 2005). The game allows players to earn points for air dropping food rations and surveying war-torn populations. Its primary goal is to increase interest and awareness of problems occurring in developing countries, which could lead to an increase in future donations and/or volunteers. While its long-term effects remain to be seen, it is possible that the interest generated through this video game will prompt some players to later pursue humanitarian aid work or donate money to the development of transition economies. An evaluative study along these lines is needed.

Online Volunteerism

There are millions of people in the world with talents that could directly benefit global aid and development projects, poverty reduction, and disaster relief and recovery initiatives. Realistically, only a small subset of them is able to leave their homes, families, and jobs when their talents are needed on the other side of the world. A solution is to lower the obstacles that prevent people from contributing their knowledge and skills (de Raad, 2003). This can be accomplished by unleashing the power of Information and Communication Technologies and creating opportunities for online volunteerism. Locally located and globally connected, people can contribute their talents to an aid project without having to leave home.

By enabling people to contribute to aid and development projects remotely through Information and Communication Technologies, online or virtual volunteerism represents a shift in how volunteer work is conceptualized. Two examples of this trend are the United Nations' Online Volunteering Service and an emerging initiative called SmartAid: Consultants without Costs.

UNV Online Volunteering Service

One notable avenue for virtual volunteerism is provided by the United Nations, which sponsors the UNV Online Volunteering Service. This service includes a website where grassroots organizations, educational institutions, local governments, United Nations agencies, and other organizations working for sustainable human development can advertise their needs for virtual volunteers. In turn, individuals wishing to provide remote assistance can search for available opportunities and request to be considered for assignments of interest. If they wish, prospective volunteers may tailor their searches according to their interests or perceived skills. For instance, they can limit their searches to certain types of task assignments (e.g., translation, writing/editing, IT development), they can browse volunteer opportunities by topic (e.g., the integration of marginalized groups, income generation and employment, youth) or they can restrict their searches to specific regions of the world (e.g., Sub-Saharan Africa, Latin America, The Caribbean).

Online volunteering opportunities are available to people with a range of backgrounds and education levels. In general, the work of UNV Online Volunteer participants can be categorized as follows (United Nations Volunteers, 2008b):

- Consulting (e.g., providing advice on legal issues, evaluating software solutions, assessing projects)
- Coordination and facilitation (e.g., serving as board members, coordinating campaigns, moderating online discussions)
- Design (e.g., creating publication layouts, designing logos, illustrating training material)
- IT development (e.g., designing databases, creating flash animations, developing and maintaining web sites)

- Project development and management (e.g., developing fundraising strategies, drafting grant applications, writing project proposals)
- Research (e.g., identifying funding sources, investigating best practices, uncovering information on development topics)
- Training and coaching (e.g., providing guidance to organizations and/or their beneficiaries, developing training material, teaching online courses)
- Writing, editing and translating (e.g., proofreading reports, drafting newsletters and articles, translating presentations)

According to recent reports, the UNV program has had success engaging highly-skilled professionals in online volunteerism. Virtual contributions have been provided by individuals with expertise in energy engineering, electrical engineering, foreign trade statistics, agro-development, sustainability, land planning, geographical information systems, economics, international business, negotiation, project management, and other areas (United Nations Volunteers, 2009). These experts' efforts have been channeled in a number of fruitful directions. Some, for example, have helped provide postsecondary correspondence courses to refugees (United Nations Volunteers, 2008a). Others have collected, analyzed, and interpreted satellite images to assess the impact of climate change (United Nations Volunteers, 2009). Online expertise has also contributed to the design of a solar electricity power system and the development of sustainable solutions to environmental pollution (United Nations Volunteers, 2009). These exemplars and others like them clearly demonstrate that online volunteer labor has the power to produce solutions to complex problems pertaining to global development and poverty reduction.

SmartAid: Consultants Without Costs

SmartAid: Consultants without Costs (SmartAid: CWC) is an emerging initiative which also entails online volunteerism. What makes SmartAid: CWC unique is its reliance on Industrial/Organizational (I/O) psychology principles and its utilization of blended, technology-mediated teams consisting of online and on-site aid workers (Atkins, Thompson, & Baker, 2009; Thompson & Atkins, 2008).

At its core, SmartAid: CWC is a program designed to improve the decisions of on-site aid workers and technical assistance (Carr, Chapter 7 this volume). Whether they are distributing supplies, re-building infrastructure, providing medical care, teaching school children, or engaging in a variety of other activities, on-site aid workers need support. Often, the quality of their decisions suffers from a lack of cultural knowledge, incomplete technical expertise, and the stress of experiencing role overload while living in a foreign culture, away from family, friends, and the comforts of home (Furnham, this volume; Berry, this volume; Selmer, this volume). Though poor decision making by volunteers is certainly not the only challenge faced by the aid and development arena, it can be an issue. Surveys and media stories highlighting technical and cultural mistakes linked to volunteers and aid projects support this contention (e.g., Fritz Institute, 2005; Marks, 2007; Perlez, 2006; Carr, Chapter 7 this volume; Carr, MacLachlan, & McAuliffe, 1998; MacLachlan et al, 2010).

The potential value of online teams as partial remedy here is thus the main focus for SmartAid: CWC. Generally, teams have the capacity to complement each other's skills, fill in each other's knowledge gaps, compensate for each other's shortcomings, provide social support to one another, reduce stress, and improve work outcomes. Consequently, SmartAid: CWC proposes that virtual teams of aid volunteers can be scientifically selected, optimally constructed, and effectively trained to support on-site volunteers. By blending online and on-site aid work, SmartAid: CWC provides on-site volunteers with an extended network to turn to for technical, cultural, and moral support and advice. Meanwhile, online volunteers' efforts can be enriched and improved through the day-to-day contextual information offered by their team members on the ground. This helps ensure that online volunteers' advice and ideas are firmly rooted in the reality of the situation at hand.

SmartAid: CWC is not linked to any one form of technology, but intends to capitalize on a wide range of available Information and Communication Technologies and evolve as new technologies emerge. For instance, once the aid assignment begins, online teammates could follow on-site volunteers' day-to-day activities through Twitter. More formal team meetings could occur through Skype. During moments of need, on-site volunteers could text, e-mail, or call one or more members of his/her online team for social support or technical advice (at least occasionally, when/where some sort of Information and Communication Technology connectivity is possible).

Substantial research and development (R&D) work for SmartAid: CWC is needed. Hopefully, recent business emphases on Corporate Social Responsibility (CSR) will encourage employers to donate experts to help SmartAid: CWC meet its R&D objectives. To this end, it is encouraging to note that today's difficult economic times have caused some organizations to step up their CSR focus, generating increased enthusiasm for engaging employees in pro-social projects, such as efforts to reduce world hunger (Lewis, 2009).

Summary and Conclusion

Since the emergence of the Internet, technology has transformed the very notion of mobility. ICTs have evolved to facilitate the instantaneous interchange of ideas, innovation, funds, and relationships across borders. In some cases this helps people maintain an interpersonal, intellectual, and financial "presence" from a distance. Thus, while lowering the barriers to international travel, globalization and Information and Communication Technology advances have also changed the implications of physically relocating within and across regions of the world (Carr, Chapter 1 this volume; Furnham, this volume).

In short, technology has the potential to reduce the "tyrannies of distance" that often indirectly or directly work against those with the least material resources to begin with. The initiatives highlighted in this chapter clearly demonstrate the occurrence of innovations that should decrease poverty, and, relatedly, should notably

alter the need for and the effects of human global mobility. This bodes well for the Millennium Development Goals. If anything is known about the future of technology, however, it's that today's tools have a short shelf life. They will quickly become obsolete. As the role of Information and Communication Technologies in our individual and collective lives continues to change, evolutions if not revolutions in technology's application to global development initiatives will be necessary. Psychology, as a discipline, has relevant expertise to offer this endeavor and a responsibility to increase its involvement in technology's application to poverty reduction initiatives (Carr & Sloan, 2003).

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Index

A

- Abducted girls, 167
- Aberdeen, 260
- Ability comparison, 128, 130
 - theory, 128
- Absenteeism, 71
- Abuse, 57
- Acacia, 312
- Academics, 270
- Access bias, 134
- Accommodation, 15, 227
- Accountants, 106
- Acculturation, 2, 8, 10, 12, 15, 27, 43, 110, 116, 156, 163, 193–194, 197–198, 201–202, 239, 253, 263, 270
 - expectations, 200
 - profiles, 206
 - styles, 4, 7, 13
- Acculturative stress, 198
- Achievement, 290
 - motivation, 5, 87–90, 94, 96–99, 143
 - orientation, 12, 119
- Across-country associations, 119
- Adaptability, 35
- Adaptation, 25–26, 28, 43, 98, 193–194, 227
 - psychological, 197
 - socio-cultural, 198
- Additive identity, 118
- Adjustment, 2, 4, 7–8, 23, 26, 30, 33–34, 36, 40, 138, 177–179, 182, 214, 262
 - bias, 216
- Adolescent girls, 160
- Adolescents, 204–205
- Adversity, 47
- Advertising, 285
- Advocacy, 65, 69, 75
- Affective inclusion, 222
- Affiliation, 87, 143
 - motivation, 88, 91–92, 96–97
- Affirmative identity, 116, 118
- Afghan Daily Stressor Scale, 47, 53
- Afghanistan, 47–48, 50–51, 53–54
- Afghans, 51
- Afghan Soviet war, 48
- Afghan Symptom Checklist, 47, 52
- Afghan War Experiences Scales, 47, 53
- Africa, 130, 132, 164, 260–261, 304, 313
- African, 314
 - American, 286
 - communities, 195
 - villages, 312
- Africans, 288
- “Ageing West”, 24
- Agency, 14
- Agency-structure interaction, 8
- Agreeableness, 6, 37, 141
- Aid, 132, 316
- Aid work, 9
 - worker, 10, 43, 127, 317
- Air travel, 309
- Albania, 92
- Alignment, 11–12, 129–130, 133–134, 138
- Almería, 245, 248
- Altruistic desires, 95
- Ambivalence, 34
- America, 37, 164, 237
- American
 - expatriates, 184
 - students, 34
 - Universities, 25
- American Friends Services Committee, 51
- American Psychological Association, 61, 63, 73
- Americas, 281
- Ampara district, 55, 57
- Analysis of variance, 204
- Anchoring bias, 216
- Ancient Greece, 3–4

- Andalusia, 236–237, 239, 241, 245–246, 248, 250, 253
- Anglicizing (of names), 282
- Anglo-Saxons, 38
- Anomie society, 95
- Anthropologist, 31
- Anthropology, 2, 43
- Anti-discrimination, 135
- Anti-immigrant, 220
- Anxiety, 35, 53, 57, 205, 289
- Anxiety/uncertainty model, 34
- Aotearoa/New Zealand, 2
- Applied mechanics, 137
- Applied psychology, 286
- Appraisal, 14
 bias, 286
- Are development discrepancies undermining performance? (ADDUP), 125, 131
- Aristotelian, 73
- Armed conflict, 10, 47–48, 55
- Asia, 175, 281
- Asian new settlers, 291
- Assessment centers, 283–284
- Assimilation, 156, 199–200, 202–203, 205–209, 227, 270
 orientation, 117–118
- Asylum, 152, 154, 164
- Atlanta, 286
 seekers, 23–24, 68, 72, 80, 195
- Attachment-to-place, 11
- Attitudes, 42
- Attraction-selection-attrition, 135, 144
- Attributional bias, 289
- Attributions, 40, 288
- Attribution training, 41
- Attrition, 5
- Auckland, 269
- Australia, 80, 127, 204, 219, 260, 268–269, 282
- Australian
 immigration policy, 80
 senate, 268
- Australian Psychological Society, 61, 63, 79
- Australians, 99, 138
- Austrian, 280
- Automatic cognitive mechanisms, 288
- Autonomy, 34, 69, 95
- Avocado, 312
- B**
- Banana, 312
- Barrow Alcohol Study, 68
- Batticaloa, 55
- Behavioural map, 23
- Behaviour modification, 41
- Beijing, 71
- Belief systems, 221
- Beneficence, 61, 65, 69, 72, 75–76
- Bi
 -directional, 307
 -national, 291
- Bias, 14
- Biased evaluations, 288
- Bicultural, 29
- Big
 Five, 4
 Overseas Experience (OE), 273
- Biographical data, 284
- Biology, 2
- Blind spot, 130
- Blogs, 305
- Blood typing, 284
- Boardrooms, 212
- Bondo association, 167
- Bosnia, 48
- Bosnians, 48
- Boston, 286
- Bougainville, 127
- Boundaryless, 14–15, 134–135, 275
 careers, 264
 -ness, 275
- Boys, 205
- Brain
 circulation, 106, 301, 307
 drain, 2, 14, 99, 126, 141–142, 267, 271, 301–302, 306–307, 309
 exchange, 307, 309
 gain, 2, 14, 134, 271, 273, 301
 power, 145
 waste, 12, 14–15, 125–126, 139, 271
- Britain, 25, 33, 39
- British, 38–39, 280
 overseas territory, 161
- Broadband, 303
 connectivity, 303
 internet access, 304
 penetration, 303–304
- Broken promise, 135
- Bulgarians, 292
- Bullying, 221
- Burkina Faso, 313
- Burnout, 79
- Business, 10
 expatriates, 36
 managers, 94

- organization, 15
 - roundtables, 144
 - sojourns, 6, 9
- C**
- Calculus
- of global competition, 267
 - of global mobility, 273
- California, 98
- Cambodia, 315
- Cameroon, 311
- Canada, 91, 94, 151, 184, 204, 236, 280, 289
- Canadian, 98
- Aid workers, 6
 - Council on Refugees, 153
 - Psychological Society, 61, 63
- Cantonese, 182
- Capabilities, 1, 15
- Cape Town, 260, 310
- Capital increment, 274
- Career, 142, 224, 259–261, 267, 269–271, 274
- advancement, 286
 - capital, 133, 144, 259, 266–267, 271, 273, 275
 - capitalism, 266
 - caregiver, 108, 114
 - development, 282
 - identity, 14
 - management theorists, 263
 - metaphor, 261
 - mobility, 274
 - orientation, 108
 - salient identity, 111
 - stage, 268
 - trajectory, 11
 - transitions, 262
- Careers, 2, 4, 9, 14–15, 27, 97, 107–110, 113, 115
- Caribbean, 5, 92, 161, 195, 316
- Case
- analysis, 78
 - studies, 159, 168, 266
- Catastrophic events, 49
- Categorization, 287
- Causal attributions, 288
- Central
- Europe, 91
 - European, 89
- Chalk-and-talk (lecture) methods, 6
- Charity, 315
- Child
- abuse, 57
 - exploitation, 78
 - protection services, 67
 - soldiers, 49
- Children, 10, 58, 93, 98–99, 113, 115, 117, 213, 215, 221, 269, 315
- Children's books, 216
- China, 25, 130, 134, 138, 173, 175–179, 181–183, 195, 282, 307
- Chinese, 71, 180, 182, 280, 282, 288
- Americans, 195
 - cultural heritage, 182
 - host nationals, 179
 - language, 179
- Chi-squared Automatic Interaction
- Detector, 125
- Cities, 315
- Citizenship, 116
- Civic participation, 220, 312
- Civilian populations, 48
- Civil rights, 229
- Civil war, 12, 306
- Classification And Regression Trees, 125
- Classmates, 226
- Climate, 8
- change, 1, 10, 15, 24
 - clergy, 91
- Closet reactance, 135
- Coalition for the Study of health, Power and Diversity, 235, 253
- Code-based education, 78
- Code of ethics, 63
- Coefficient Alpha, 201
- Cognitive
- abilities, 285
 - closure, 251
 - intervention, 80
 - training, 41
- Collective
- consent, 68
 - decision-making, 66
 - identity, 105
 - rights, 66
- Collectivism, 35, 41
- College students, 90
- Colombian, 310
- Colonial, 196
- Common Ingroup Identity Model, 228
 - days, 126
 - expansion, 3
- Colonization, 195
- Common goals, 293
- Communion, 163
- Communist economies, 91

- Community
 - associations, 13
 - development, 11
 - level, 13
 - psychology, 252
 - services, 12, 67
- Commuter assignments, 268
- Company-assigned expatriates, 106
- Comparative ratios, 128
- Comparison, 288
 - processes, 128
- Compartmentalization, 10
- Competencies, 12, 14, 125, 144
- Competency
 - development, 125
 - flow, 141
- Competition, 289–290, 309
- Competitive, 274
- Competitiveness, 213, 271
- Completion (of sojourns), 6
- Computer-supported cooperative work, 301
- Concrete ceiling, 128
- Conditional duties, 75–76
- Conferences, 94
- Confidentiality, 70
- Confirmation bias, 216
- Conflict, 49–50, 106, 135, 154
- Conflicts of interest, 69
- Congo, 311
- Connective technology, 14
- Connectivity, 2
 - gap, 304
- Conscientiousness, 6, 37, 141
- Construction worker, 263
- Contact-coordination function, 30
- Contact hypothesis, 229
- Content
 - analysis, 138
 - syndication, 305
 - tagging services, 305
- Contextual performance, 132
- Contract workers, 71
- Control function, 30
- Conventions, 94
- Co-operative inter-dependence, 293
- Coping
 - responses, 40
 - strategies, 50, 177, 250
- Corporate
 - culture, 38
 - restructuring, 274
 - Social Responsibility (CSR), 302, 315, 318
- Correlational analysis, 199
- Counter-transference, 62
- Coworkers, 225–226
- Crisis stage, 33
- Critical incidents, 6, 10, 78
- Cronbach's alpha, 53
- Cross-community fit, 13
- Cross-cultural
 - adaptation, 34
 - adjustment, 2
 - competence, 10
 - differences, 177
 - psychology, 25, 194
 - research, 69
 - resilience, 4
 - safety, 10
 - simulators, 4
 - training, 4, 8, 12, 139, 173–176, 180–181, 183–186
 - validity, 283, 286
- Cross-national assignments, 6
- Cultural
 - adaptation, 240–241
 - artefacts, 5
 - awareness training, 293
 - capital, 152
 - competence, 138–139
 - control (policy of), 181
 - differences, 7, 15, 23, 25, 28
 - dimension, 239–240
 - distance, 7, 37, 287
 - diversity, 8
 - empathy, 26
 - groups, 100
 - identity, 107–108, 115–116
 - intelligence, 28, 36, 138
 - mistakes, 317
 - novelty, 184
 - pluralism, 208
 - sensitization, 41
 - training, 14
 - values, 4
- Culturally appropriate norms, 286
- Culturally competent, 75
 - Employment policies, 145
 - Services, 74
- Culturally literate, 74
- Culture, 27
 - assimilators, 6
 - general training, 175
 - learning, 29
 - of migration, 14, 273
 - shock, 4, 7–8, 10, 12, 23, 28, 31, 33–34, 39–41, 43, 131, 141, 263

- shock questionnaire, 24
- specific norms, 283
- specific training, 175
- Culture Differences Index, 24, 32
- Culture-general assimilator, 7
- Culture learning perspective, 40
- Culture-specific assimilators, 6
- Culturing of enterprise, 15

- D**
- Daily stressors, 49–50, 53–54
- Dari, 53
- De-categorization, 293
- Decelerating life stage, 109
- Decent
 - employment, 98
 - work, 98
 - work agenda, 133
- Decision Tree Analysis, 143
- Defensive routines, 11, 126, 135, 138–139, 145
- Demographic characteristics, 287
- Demography, 43
- Denmark, 292
- Deontological, 75
- Department for International Development,
 - 125, 152, 161–162
 - of Labor (NZ), 134, 281
- Depression, 7, 53, 57, 138, 205, 260
- Deprivation, 57, 135
- Detention centres, 69
- Developed
 - economies, 106, 119, 270, 304
 - nations, 274, 307
 - regions, 307
- Developing
 - countries, 112, 155, 304, 307
 - economies, 106, 304
- Development
 - cooperation, 129
 - policy, 9, 134
 - projects, 14
- Diabetes, 52
- Diaspora, 106, 108, 195, 307, 310, 312
 - knowledge networks, 310–311
 - option, 118–119
- Didactic approaches (to training), 78
- “Diffusionist” view, 9
- Digital
 - cameras, 305
 - diaspora networks, 310
 - divide, 304
 - literacy, 304
- Diplomats, 24, 26, 30

- Disabilities, 49
- Disaster relief, 316
- Disasters, 1, 8, 49, 55, 154, 236
- Discourses, 135
- Discrimination, 6, 14, 29, 37, 40, 69, 97–98,
 - 133, 204–205, 222, 239, 241, 248,
 - 279, 281–282, 288–289, 291
- Discriminatory
 - behavior, 288
 - laws, 75
- Displacement, 15, 48
- Disposable income, 3
- Distancing, 6
 - tyranny, 14
- Distress, 51–55, 61–62
- Distributive
 - injustice, 130
 - justice, 129
- Diversity goals, 294
- Djinn (spirit) possession, 54
- Dkn project, 311
- Domestic violence, 54
- Dominance, 145
- Dominican Republic, 304
- Do no harm, 65
- “Dose effect” phenomenon, 49
- Double de-motivation, 125, 131
- Downward spiral, 162
- Dual
 - career partner, 108
 - citizenship, 119
 - cultural identity, 117
 - host-home country identity, 116
 - salary, 14, 127–128, 135
 - salary policy, 127
 - salary system, 125–126, 132
- Dubai, 260
- Due care, 76
- Dysphoria, 53

- E**
- Earning power, 144
- East
 - Africa, 304
 - African Community, 125, 134
 - Asians, 288
- Eastern
 - Europe, 5, 89, 261, 307
 - Europeans, 288
- Ecological
 - approach, 237
 - systems, 220
 - model, 216–217

- Economic
 - apartheid, 127
 - aspirations, 279
 - conditions, 289
 - decline, 89
 - development, 7, 99, 137
 - discrimination, 289
 - factors, 87
 - hardship, 135
 - inequity, 127
 - new settler, 10
 - reasons, 94
 - success, 120
- Economically
 - depressed areas, 90
 - disadvantaged regions, 90
- Economics, 2–3, 145
- Economic and Social Research Council, 125
- The Economist, 135
- Economy, 1, 271
- Education, 10, 37, 133, 265, 271
 - services, 308
- Educational
 - aid, 130
 - effect sizes, 139
 - institutions, 7
- E (Electronic)
 - banking, 309
 - bay, 313–314
 - diaspora, 310–311
 - mail, 311, 318
- Egalitarian (gender roles), 115
- Ego-enhancement, 95
- Elderly, 94
 - relatives, 109, 115
- Elephants in the parlour, 126, 133–134, 145
- Elizabethan England, 4
- Emancipatory communitarianism, 74
- Emerging economies, 11, 130
- Emigrant, 2
- Emigration, 2, 9, 126, 142
 - desires, 90
 - policies, 100
- Emotional
 - distress, 50
 - intelligence, 28
 - stability, 6, 37, 141
- Employees, 212
- Employers, 285
- Employers' expectations, 61
- Employment, 244, 249, 261
 - bias, 279
 - decisions, 290
- Empowerment, 13, 133, 253
- Encounter (career stage), 262
- Engineers, 106, 263
- English proficiency, 221
- Enterprise, 15
 - development, 12, 144
- Entrepreneurial
 - activity, 89
 - ventures, 106, 108, 119–120
- Entrepreneurs, 8
- Environment, 92
- Environmental stressors, 55
- Equal access, 215
- Equality, 134
- Equitable participation, 209
- Equity, 129, 214
 - restoration, 129
 - sensitivity, 14, 133
 - theory, 129
- Escalation, 204
- Esoko, 314
- Ethical
 - decision making, 63, 75, 79, 81
 - decisions, 61
 - dilemmas, 61–62, 69, 72, 75
 - distress, 79, 81
 - duties, 65–66, 75
 - reasoning, 62–63, 75, 78
 - responsibilities, 61, 63, 67, 70, 75
 - standards, 62, 69–70
 - uncertainty, 68
- Ethics, 28
- Ethnic
 - background, 285
 - biases, 283
 - discrimination, 238, 241, 244
 - groups, 67
 - minorities, 68, 286, 292
 - prejudice, 238, 241
- Ethnicity, 265, 284, 288
- Ethno-cultural
 - groups, 194–195, 199, 207, 209
 - identity, 27
 - Phaulisms, 216
- EU countries, 25
- Euphoria, 263
- Eurobarometer Public Opinion Survey, 289
- Europe, 236–237, 269
- European, 196, 205, 282, 292
 - commission, 292
 - countries, 140
 - Union, 292

- Exclusion, 13, 134, 199, 200, 212, 216, 221, 225, 247
- Executives, 25, 106
- Exo-system, 219
- Expatriate, 126–127
- Expatriate, 125, 268, 307–311
 - aid, 14
 - assignment, 127, 212
 - identity, 105
- Expatriates, 23, 26–28, 30, 36, 173–178, 183, 185–186, 224–225
- Expatriation, 105–106, 111, 117, 266–267, 273
- Expectancy theory, 113
- Experiential
 - approaches, 78
 - learning, 41
- Expert panel, 55
- Exploring stage (in careers), 108
- Extended family, 115
- Extension workers, 313
- Externalizing, 57
- Extraversion, 37, 141
- F**
- Facebook, 306, 314–315
- Face-to-face interviews, 285
- Factor analysis, 53, 57
- Factor structure, 50
- Families, 58
- Family, 31, 53, 87, 92–94, 97, 105–107, 110–111, 114, 142, 267, 269, 274, 306
 - caregiver, 115
 - crises, 11
 - Far East, 140
 - focused mobility, 223
 - identity, 118
 - men, 114
 - option, 118
 - reunification, 196
 - reunion, 211
 - roles, 117
 - support, 12
 - ties, 113, 115
 - violence, 67
- Famine, 236
- Farmers, 14, 313
- Farming, 312
- Fatalism, 28
- Fault-lines, 135, 291
- Fear of rejection, 91
- Federal government, 212
- Female
 - headed households, 159
 - professionals, 108, 115
- Femininity, 35
- Fertility rates, 271
- Fiber optic cables, 304
- Financial benefits, 268
- Finite resources, 135
- Finland, 97, 205
- First
 - peoples, 2, 58
 - World War, 260
- Fit, 111, 221, 287
- Flickr, 306
- Flight, 151
- Focus groups, 53, 55–57
- Folksonomies, 305
- Food supply, 160
- Forced
 - mobility, 9, 48, 55
 - new settlement, 48
- Forcible repatriation, 153
- Foreign
 - students, 24, 96
 - subsidiaries, 181, 186
- Forest resources, 313
- Four-factor theory, 41
- France, 134, 136, 205, 284, 292
- Francophone Initiatives of African Women
 - in France and Europe, 311
- Fraternity, 134
- Free
 - agents, 30
 - labour markets, 127
 - listing (interviews), 47
 - listing procedure, 50
- French
 - Canadians, 195
 - nationals, 136
- Friends, 87, 92, 94, 97, 306
- Friendships, 113–114, 239
- Frustration theory (of mobility
 - desires), 90
- Functional impairment, 53
- Fund-raising, 315
- G**
- Gabon, 311
- Gallic, 37–38
- Gallup polls, 289
- Gauls, 38
- GDP, 15

- Gender, 1, 8, 11, 35, 37, 109, 118, 204–205, 209, 265, 268
 - differences, 92–94
 - identity, 110
 - roles, 11, 14, 98, 115, 118
 - theory, 114–115
 - General Mental Ability, 139–140
 - Geneva, 224, 313
 - Geneva Convention, 161
 - genocide, 306
 - relating to the status of refugees, 153
 - Geographical mobility, 263
 - Geographic Information Systems, 302, 314
 - Geography, 2, 43
 - German, 38–39
 - Germany, 39, 184, 219
 - Ghettos, 36
 - Girls, 56, 205
 - GIS technologies, 314
 - Glasgow, 163
 - City Council, 164
 - Global
 - development, 312
 - era, 10–11
 - inequity, 9
 - Resource Kit and Orientation Seminar Guide, 167
 - Global
 - inequalities, 301, 303
 - mobility, 118, 301, 306, 308, 311
 - mobility patterns, 306
 - Positioning system (GPS), 302, 305, 312–313
 - warming, 10
 - Globalization, 1, 10, 27–28, 127, 174, 267
 - Globe-trotting, 259
 - Glocality, 10
 - Google maps, 315
 - Government
 - agencies, 70
 - policies, 219, 306
 - Graphology, 284
 - Great
 - Britain, 25, 282
 - Eight, 140
 - Greater
 - China, 178
 - good, 9, 66, 68–69
 - Great Rift Valley, 2
 - Greece, 39, 292
 - Greek
 - Australians, 195
 - new settlers, 5
 - Green Belt Movement, 312–313
 - Greenhouse agriculture, 237, 245
 - Grief, 52
 - Group-serving
 - attributions, 289, 293
 - biases, 288
 - Guidelines on Mental Health and Psychosocial Support in Emergency Settings, 157
 - Guilt, 129
- H**
- Haiti, 308
 - Hand-held global positioning devices, 14
 - Harmonization, 127, 129–130
 - Harvard World Mental Health project, 156
 - Hawaiki, 2
 - Health, 99
 - care, 221
 - care professionals, 252
 - hierarchy of needs, 160
 - practitioners, 78
 - professionals, 72, 128
 - services, 66
 - Heritage culture, 199, 203, 208
 - Hierarchical linear modeling, 235, 241
 - High blood pressure, 52
 - Higher education, 9
 - Higher-income economies, 134, 137
 - Highly skilled, 9
 - globetrotters, 267
 - High paying jobs, 90
 - High school, 226
 - Hispanic Americans, 3, 286
 - History, 2
 - HIV infection, 68
 - Hmong, 221
 - Home-country
 - Escapism, 178
 - governments, 105
 - Sweet Home, 311
 - Homeless, 246
 - Young People's Team, 165
 - Homemaker, 108
 - Home Office, 164
 - Homeowners, 93
 - Homesick, 92
 - Honesty tests, 283
 - Honeymoon stage, 33
 - Hong Kong, 175, 177–178, 182, 280
 - Host-country
 - career embeddedness, 111
 - nationals, 177, 288
 - Hosted services, 305

- Household survey, 159
- Housing, 49, 244, 249
- HTML, 305
- Human
 - behavior, 2
 - capital, 14, 128, 132, 138, 142, 307
 - development, 1, 2, 7, 11–12, 14–15, 125
 - factors, 311
 - health, 9, 15
 - motivation, 4
 - poverty, 4
 - relations, 144
 - resource management, 264, 266
 - resource professionals, 139
 - rights, 251, 312
 - rights act, 138
 - rights violations, 64
 - transformation, 9
- Human Development Report, 1, 2, 4, 125–126, 133, 138, 168, 273
- Humanitarian
 - agencies, 157
 - aid work, 315
 - assignments, 3
 - discourse, 152, 160
 - objectives, 301, 303, 312
 - programmes, 155
 - values, 196
 - video game, 315
- Husband, 98
- I**
- Identification, 3, 7, 105–106, 110, 270
- Identity, 1, 3, 8, 11, 13, 15, 27, 40, 105–106, 128, 145, 199, 203, 223, 239, 251
 - construction, 265
 - theory, 107
- In-group, 14, 107, 115, 135, 212, 226, 288
- In-house recruiting, 283
- Illegal new settlers, 247
- Illicit
 - activity, 71, 75
 - drugs, 70
- Illiteracy, 54
- Immigrant, 2–3, 96, 194–195, 202, 204–206, 208–209, 211, 282, 285
- Immigration, 2, 8, 9, 68, 134, 211, 285–286, 291
 - and Asylum Act, 164
 - breaches, 71
 - policy, 156
 - swings, 219
- Imperative duty, 66
- Imperial powers, 2
- Implicit
 - selection, 285
 - selection criteria, 285
- Impoverished regions, 303
- Impoverishment, 306
- Incentives, 8, 139
- Inclusion, 2, 8, 13, 15, 211–213, 215–219, 221–224, 226–227, 229
- Income differentials, 6
- India, 25, 130, 138, 195, 260, 282
- Indicators of Integration, 156, 166
- Indigenous, 125
- Indigenous peoples, 3, 195–196
- Individual
 - agency, 265
 - consent, 68
 - differences, 43, 194
 - rights, 66
- Individualism, 4, 35, 41, 251
- Indonesia, 269
- Indo-Pakistanis, 280
- Industrial unrest, 127
- Inequality, 280
- Informal contract, 72
- Information
 - and communication technologies, 301–303, 306, 308–314, 316, 318
 - economy report, 309
 - flows, 304
 - gain, 301, 303, 313
 - giving, 41
 - mobility, 14
 - technologists, 106
 - technology workers, 98
- Informed consent, 66
- Injustices, 3, 106, 132, 135
- Insomnia, 52
- Institute of Inclusion, 214
- Institutionalized xenophobia, 12
- Integrated
 - settlements, 160
 - threat theory, 289
- Integration, 199–200, 202–203, 205, 207, 219, 293
 - orientation, 117–118
- Integrity
 - principle, 66
 - tests, 284
- Intelligence quotients, 126
- Intelligent, 270
- Interactional justice, 130
- Inter-Agency Standing Committee, 152, 157

- Intercultural**
 adjustment, 7, 11, 141
 contact, 227, 239, 279
 relations, 27
 (social) skills training, 42
 strategies, 193
 training, 26
- Inter-dependence**, 14, 228
- Interdisciplinary**, 9, 12, 275
- Inter-group**
 anxiety, 289, 291, 293
 relations, 40
 rivalry, 135, 288
- Internal**
 consistency, 53
 migration, 88
- Internalizing**, 57
- Internally displaced person**, 154
- International**
 aid, 126
 assignment, 26
 assignments, 130, 132, 176, 224
 association for migration, 2
 careers, 267
 Committee for Social Science Information
 and Documentation, 302, 311
 education, 9
 Federation Reference Centre for
 Psychosocial Support, 167
 joint ventures, 130, 180–181
 Labour Organization, 126, 133
 management styles, 38
 mobility, 91, 93
 Organization for Migration, 125
 organizations, 178, 180, 186
 schools, 224
 standards for professional
 practice, 73
 student, 10, 25, 94
 study, 196
 Trade Centre, 313
 volunteers, 6
- Internet**, 283, 301, 308–309, 315
 banking, 309
 -based ventures, 307
 connections, 314
 games, 90
 infrastructure, 309
 penetration, 304
 prices, 305
 usage, 301, 303
- Inter-parental conflict**, 57
- Interviews**, 283
- Intra**
 -company transfer, 106
 -national assignments, 6
- Intuitionism**, 75
- Inverse resonance**, 137
- Involuntary**
 migrants, 224
 new settlers, 195
- IQ**, 139
- Iran**, 48
- Ireland**, 260, 281
- Isomorphic attributions**, 42
- Israel**, 289
- Israeli**, 289
- Italy**, 292
- J**
- Jamaica**, 89
- Japan**, 95
- Japanese**, 89, 288
- Jigsaw classrooms**, 13, 228
- Job**, 135
 analysis, 5, 133
 competencies, 140
 dissatisfaction, 79
 evaluation, 5, 133
 joint ventures, 130
 knowledge test, 284
 market, 112
 opportunities, 100, 136
 performance, 142
 satisfaction, 130, 132, 293
 search, 247
 selection, 125
 selection bias, 9
 specification, 5
 tryout procedures, 284
 validation, 5
- Jordan**, 308
- Justice**, 61, 72, 75, 132, 214
- K**
- Kabul**, 51, 53
- Kantian**, 63
- Kenya**, 95, 134, 269
- Kenyan**, 312–313
- Key informant interviews**, 47
- Know-how function**, 30
- Knowing**
 -how, 266
 -whom, 266, 270
 -why, 266, 273
- Knowledge**
 capital, 266

- economy, 14, 134
- networks, 312
- Korea, 25
- Koreans, 288
- Kurdish, 164
- L**
- Labor
 - lack-of-fit model, 287
 - market outcomes, 279
 - markets, 106, 238, 244, 273, 275, 282, 287, 289
 - unions, 13, 250
- Landline telephones, 303
- Language
 - ability, 37
 - acquisition, 249
 - barrier, 178
 - competence, 240–241, 243, 248
 - difficulties, 225
 - proficiency, 116
 - skills, 228
 - training, 179–180
- Laptops, 305, 314
- Latin America, 316
- Latino-American, 286
- Latinos, 288
- Latvians, 292
- Leaders, 28
- Leadership, 26, 90, 141, 250
 - styles, 28
- Learning by doing, 42
- Lebanese, 134
- Lebanon, 136
- Lecture-only (training), 78
- Leisure travel, 87, 95
- Less developed economy, 270
- Liberalization, 9
- Liberation psychology, 13, 235, 237, 240, 244, 251, 253
- Liberty, 134
- Licensing, 71
 - authorities, 63, 72
- Life expectancy, 15
- Life satisfaction, 241, 243, 247
- Lifestyle, 9, 98, 108–109, 113, 142, 270, 274
- Linguistic similarity, 211
- LinkedIn, 306
- Listserve, 311
- Literacy, 53
- Lithuanians, 292
- Local government, 69
- Localization, 133
- Location-based services, 305
- Locus-of-control, 39
- London, 25, 151, 260
- Longitudinal Immigration Survey, 281, 283
- Los Angeles, 286
- Lottery system, 142
- Lower-income
 - countries, 14
 - economies, 11, 137
 - groups, 9
 - settings, 9, 14, 125, 134
- Low socio-economic communities, 72
- Luxembourg, 236
- M**
- Macro
 - level, 306
 - policy, 15
 - system, 220
- Macro level, 40
- Maintenance life stage, 109
- Majority, 291
- Malaŵi, 130–131, 151
- Mali, 313
- Management Science, 43
- Managers, 293
- Mandatory
 - detention, 80
 - immigration detention, 80
 - reporting, 70
- Marginalization, 49, 199–200, 202–203, 205, 207, 209, 211–212, 216, 247–250
- Marginalized workers, 3
- Market economies, 90–91
- Marketing mix, 145
- Marriage, 113
- Married women, 53, 114
- Martial satisfaction, 98
- Masculinity, 35
- Massacres, 56
- Matching, 11
- Materialism, 3, 97
- Mathematical techniques, 97
- MBA, 225
- Médecins Sans Frontières (MSF), 302, 315
- Medical
 - rights, 68
 - services, 66
- Medieval Europe, 4
- Melting pots, 8, 200–201
- Men, 93, 100, 114

- Mental**
 ability, 215
 health, 47, 49–51, 53–55, 72, 238, 252, 293
 illness, 36
Mentor, 34
Mere Exposure, 229
Meso-system, 218
Meta-analytic study, 284
Metropolitan cities, 197
Mexicans, 65, 70, 89
Mexico, 220
Micro
 -**blogging**, 306
 -**level**, 8
 -**system**, 217
Middle East, 140
Middle Easterners, 288
Middle managers, 181
Migrant, 2, 6, 96
 -**to-non-migrant earnings ratios**, 128
 -**personality**, 88–89
Migration, 3, 9, 24, 193
Migration-development nexus, 2, 14, 125, 133–135, 138, 145
Military, 6
 -**families**, 223
 -**invasion**, 196
 -**personnel**, 94, 315
 -**staff**, 94
Millennium, 25
 -**Development Goals**, 302, 319
Miniaturization, 305
Minorities, 9, 219, 281, 286, 289
Missionaries, 23–24, 30, 36, 94
Mixed methods, 10–11, 13, 47, 50, 54, 58
Mobile
 -**personality**, 88–89, 96, 100, 142
 -**phones**, 305–306, 309, 313–314
 -**phone subscribers**, 304
 -**phone users**, 304
 -**populations**, 61
Mobility
 -**decisions**, 94
 -**dimension (in acculturation)**, 194
Model, 63
Modelling, 7, 28, 182
Modus Vivendi, 193–194
Monochromic, 39
Montserrat, 163
 -**Diaspora**, 162
Moral intuitions, 75
Moroccan, 235–236, 239–241, 244–250
Moroccan communities, 13
Motivation, 2, 4, 6, 26, 28, 93, 98
Motives, 3, 8, 11, 88
Multi
 -**disciplinary**, 1
 -**level interventions**, 145
 -**media**, 305
 -**mining company**, 127
 -**National**, 37, 106
 -**National Corporations**, 181
Multi-City Survey of Urban Inequality, 286
Multicultural, 213
 -**ideology**, 200–201, 248, 290
 -**practice**, 73
Multiculturalism, 8, 29, 73, 200, 208–209
Muslim, 55
Mutual
 -**accommodation**, 193, 201
 -**contact**, 293
 -**differentiation**, 293
MySpace, 306

N
“Narcissism of minor difference”, 135, 137
National
 -**association abroad**, 108
 -**culture**, 118
 -**entity**, 11
 -**institutions**, 201
 -**languages**, 203
 -**minorities**, 195
 -**nations**, 270
 -**surveys**, 288
 -**universities**, 127
Natural disasters, 10, 12, 47–48, 50, 54, 211, 223
Naturalistic field experiment, 282
Naturalization, 216
 -**laws**, 212
Nazi Germany, 151–152
Need
 -**to achieve**, 95
 -**for achievement**, 2–3, 100, 107–108, 110–111, 141
 -**for affiliation**, 110, 115
 -**motivation theory**, 109
 -**for power**, 100, 141
 -**for success**, 98
Negative stereotypes, 288
Neighborhoods, 225, 237, 247, 250
Nepotism, 28
Nervous irritability, 53
Netherlands, 139, 280, 282, 292
Networking, 285

- Networks, 270–271, 311
 - Neuroticism, 6
 - New careers, 265
 - Newham Children's Fund, 153
 - New settlement, 3, 24, 29, 61, 87, 90–91, 134, 154, 163, 168, 194, 196, 219, 235–236, 239, 288–289, 292
 - New settler, 1–3, 5, 10, 12, 23–25, 28, 30, 36, 41, 65, 68, 70–72, 87, 89, 93, 97–100, 106, 125, 133–135, 138–140, 143, 152–153, 163, 197, 200, 204, 206, 211–212, 216–217, 219, 222–223, 226–227, 238, 240–241, 243–244, 249–253, 271–272, 280–281, 284–286, 288–290, 292–294
 - associations, 250
 - motives, 11
 - New Zealand, 3, 5, 97, 99, 134, 138, 142, 259–261, 268, 271–274, 280, 282, 285, 289, 291
 - New Zealanders, 142
 - NGOs, 95
 - Nicaragua, 308
 - Niger, 315
 - Nipponic, 37–38
 - Non-maleficence, 61, 69, 72, 75–76
 - Non-mobile personality, 88
 - Non-profit
 - organization, 4, 174, 314
 - workplace, 130
 - Non-verbal communication styles, 284
 - Normative ethical theory, 63
 - North African, 304
 - Northwest Europe, 281
 - Norway, 205
 - Ntcheu district, 152, 159
- O**
- Obedience, 250
 - Objective career, 262
 - Occupational labor market, 264
 - Occupations, 259, 262, 265, 274, 281
 - Oceania, 130, 132, 144
 - OECD (Organization for Economic Co-operation and Development), 106, 235, 267, 279, 307
 - Online
 - 3D virtual worlds, 305
 - team, 318
 - transfer systems, 309
 - volunteering, 14
 - Openness to new experience, 6, 141
 - Open systems, 237
 - Operational validity, 140
 - Opinion comparison, 128
 - Optimal Distinctiveness theory, 225
 - Organizational
 - acculturation, 181
 - careers, 264
 - citizenship behavior, 132
 - commitment, 130
 - communication, 293
 - culture, 181, 213
 - development, 62
 - factors, 173
 - learning, 135
 - life, 212
 - networks, 67
 - participation, 250, 287
 - practices, 126
 - psychologist, 71
 - psychology, 134
 - research, 71
 - survey, 129
 - Organization behaviour, 26
 - Organizations, 54, 58, 120, 126, 134–135, 141, 144, 186, 213, 218, 220, 225, 229, 242, 250, 253, 259, 261–262, 265–266, 270–271, 274, 281, 287, 291, 294, 314
 - Out-group, 40, 107, 116, 212, 288–289
 - derogation, 288
 - Outward mobility, 90
 - Overcrowded housing, 49
 - Overseas
 - Experience (“O.E.”), 142, 259, 273
 - posting, 196
 - students, 307
 - type, 11
 - Over-socialized view of man, 155, 159
 - Oxford, 260
- P**
- Pacific, 2, 6
 - countries, 142
 - Island Nations, 128, 138, 281
 - Pakistan, 48, 53
 - Papua New Guinea, 127, 130, 145
 - Parent
 - cultural values, 181
 - interviews, 55
 - Parents, 98–99, 108, 218
 - Paris declaration on aid effectiveness, 127
 - Participative research, 65
 - Part-time jobs, 222

- Pashto, 54
- Patriarchal system, 116
- Patriotism, 112, 220
- Pay
 - differentials, 133
 - parity, 289
 - ratios, 131
- Peace Corps, 5–6
- Peace Prize, 312
- Peer ratings, 284
- P-E match, 13
- People's Republic of China, 12, 281
- Perceived
 - discrimination, 37, 204
 - ethnic discrimination, 243
 - ethnic prejudice, 248
 - threat, 289
- Perception, 8
- Perceptual field, 8
- Performance, 2, 6–8, 138–140, 178, 213, 286
 - criteria, 5
 - evaluation, 279, 286, 288
- Peripatetic, 9
- Permanence dimension (in acculturation), 194
- Persecution, 106, 306–307
- Person
 - centered research, 6
 - environment fit, 221
 - situation interaction, 221
- Personal
 - choice, 98
 - computer, 306
- Personality, 1, 4, 9, 11, 28, 96–98
 - psychology, 6
 - traits, 6
- Perspective-taking, 140
- Philippines, 95, 269
- Pittsburgh, 90, 93–94
 - students, 94
- Place attachment, 88–89, 91–93, 95–97
- Planned happenstance, 274
- Plural societies, 193
- Plymouth, 161
- Podcasting, 305
- Points system, 134
- Poland, 260, 280
- Poles, 292
- Policies, 8
- Policy
 - capturing, 137
 - espoused, 137–138
 - in-use, 137–138
 - makers, 209
 - making, 9
 - recommendations, 13
- Polish peasant, 237
- Political
 - beliefs, 36
 - instability, 106
 - power, 36
 - systems match, 7
 - violence, 50
 - refugees, 24
 - unrest, 211
- Politics, 2
- Pollokshaws, 163
- Pollution, 217
- Poly-chronic, 39
- Portugal, 39
- Positive interdependence, 13
- Post-conflict settings, 50
- Post-traumatic sequelae, 55
- Post-traumatic stress disorder (PTSD), 48–49, 53–54, 57
- Poverty, 4, 14, 49, 54, 106, 236, 302
 - reduction, 2, 120, 302, 306, 312, 316–317, 319
- Power, 5, 11, 15
 - distance, 23, 35
 - dynamics, 239, 244
 - motivation, 87, 88, 95–99
 - powerlessness, 250
 - relations, 160
- Practitioners, 63
- Pre
 - new settlement, 49
 - screening, 279, 283, 285
- Predictive validity, 137
- Prejudice, 6, 42, 73, 98–99, 145, 201, 215, 241, 246, 248, 252, 273, 289–291
- “Preliterate tribes”, 5
- Preparation (career stage), 262
- Pre-screening, 14
- Prima facie duties, 10, 61–63, 72, 75–78, 80
- Primary client, 10
- Principle theory, 75
- Privacy, 70
- Private sector, 132
- Problem-focused coping, 177
- Procedural justice, 130
- Production operators, 106
- Productivity, 43

- Professional, 105
 - associations, 69, 72–73, 225
 - development, 78
 - distress, 61
 - research ethics, 79
 - services, 61
 - Promotion, 289
 - Pro-social initiatives, 313
 - Prototype, 108, 116
 - Prototypical attributes, 107
 - Psychiatric symptomatology, 49
 - Psychiatrists, 30
 - Psychiatry, 43
 - Psychological
 - acculturation, 196
 - adaptation, 205, 207, 240–241
 - balance, 129
 - barriers, 176–177
 - dimension, 239
 - success, 262
 - tests, 285–286
 - Psychologists, 30, 311, 314
 - Psychology, 319
 - Psycho-social
 - assessment, 47
 - care, 55
 - functioning, 50
 - health needs, 72
 - somatic symptoms, 205
 - training manual, 167
 - wellbeing, 47, 55, 57, 155–157, 162
 - working group, 152, 157
 - Public
 - opinion, 211
 - policy, 211
 - sector agencies, 69
 - transport, 247
 - Pull factors, 24, 29, 72, 224, 273, 280, 306
 - Push factors, 24, 29, 72, 90, 224, 273, 280, 306
 - Putonghua, 179
- Q**
- Qualitative, 10, 47–48, 54–55, 246
 - Quality of life, 160
 - Quantitative, 10, 47–48, 246
 - Quasi-simplex pattern, 131, 140
 - Quickening effect, 10
 - “Quick ethnography”, 48
- R**
- Racial similarity, 221
 - Racism, 73, 239, 290
 - Rater bias, 286
 - Read/write Web, 305
 - Realistic
 - conflict, 137–138
 - threat, 289, 293
 - Re-categorization, 293
 - Recession, 127
 - Reciprocal determinism, 141
 - Recovery stage, 33
 - Recreational travel, 97
 - Recruitment, 14, 279, 294
 - agents, 283, 285
 - Recursive model, 142
 - Reference
 - checks, 284
 - groups, 128, 130
 - Referrals, 283
 - Refugee
 - Study Centre, 64
 - women, 159
 - Refugee-hood, 9
 - Refugees, 3, 10, 12, 24, 30, 64, 67–68, 78, 152–154, 167, 195–196, 208, 218, 223
 - Regional Centre for Mapping of Resources for Development, 313
 - Regression, 241
 - Relational identity, 108, 114
 - Relative deprivation, 138
 - Reliability, 47, 50, 283
 - Religion, 28
 - Religious persecution, 10, 42
 - Remittances, 105, 126, 308–309
 - Remote rural communities, 72
 - Remuneration, 125, 128–131
 - differences, 132
 - disparities, 130
 - inequities, 132
 - systems, 132
 - Renters, 93
 - Repatriate, 105, 109, 111–117
 - Repatriation, 34, 107, 115, 156, 183, 225
 - Republic of South Africa, 159, 304
 - Research ethics, 78
 - committees, 69
 - Resilience, 7, 54, 141
 - Resource
 - acquisition spirals, 157
 - scarcity, 289
 - Response bias, 137
 - Retirement, 109, 261
 - Return option, 118
 - Reverse migration, 307
 - Reward allocation, 26
 - Risk takers, 90

- Risk taking, 270
- Role
 - identity, 105
 - overload, 317
 - play, 7, 78
- Romania, 260
- RSS feeds, 305
- Rumination, 53
- Rural
 - African viillage, 314
 - areas, 237
 - net scheme, 304
- Russia, 90, 97, 260–261, 307
- Rwanda, 50
- Rwandan, 151

- S**
- Salary, 265
- Saxon, 37
- Scandinavia, 12, 39
- Scholars, 223
- School-related concerns, 98
- Schools, 212, 228, 239
- Scientists, 223
- Scotland, 151–152, 163–164, 260
- Scottish Refugee Council, 152, 165
- Seasonal
 - work, 95
 - workers, 94
- Second
 - life, 306
 - World War, 153
- Secretary, 263
- Segregation, 129, 200–201, 248–249
- Selection (jobs), 5, 14, 28, 43, 279, 286–287, 289, 294
 - bias, 283
- Self
 - awareness training, 41
 - categorization, 279, 288
 - determination, 13
 - development, 97
 - efficacy, 34, 111
 - enhancement, 107
 - esteem, 107, 198, 205, 238, 250
 - initiated expatriates, 106, 116
 - initiated expatriation, 107
 - initiated global mobility, 267
 - injurious behavior, 68
 - serving attributions, 289
- Senegal, 314
- Sensation-seeking, 15, 96–97
- Separation, 156, 199, 202–203, 206–207, 209
 - orientation, 116, 118
- September 11th, 220
- Servant of power, 133
- Service
 - delivery, 65, 74
 - recipient, 63–64, 66, 68–70, 75
- Settler societies, 204–205
- Sexual assault, 49
- Sex work, 71
- Shanty, 245
- Shared decision making, 66
- Short-term travel, 95
- Sierra Leone, 167, 315
- Silicon Valley, 266
- Similarity, 145
 - attraction, 138, 287
 - attraction theory, 135
- Singapore, 178, 280
- Sinhalese, 55, 57
- Situational
 - interviewing, 133, 139
 - judgments, 6
 - slaves, 195
- Skilled
 - emigration, 307
 - migration, 271
 - new settlers, 283
- Smart Aid, 14, 302, 316–318
- Social
 - bookmarking, 305
 - cartographers, 314
 - categorization, 107
 - class, 263
 - cognitive career theory, 111
 - comparison, 128
 - Darwinism, 39
 - dominance, 14, 228, 279
 - dominance orientation, 290
 - dominance theory, 135
 - ecology, 157
 - equity, 15, 123, 129, 145
 - identification, 288
 - identity, 11, 40, 107–108, 136, 213, 279, 287–288
 - inclusion, 213
 - informatics, 311
 - intelligence, 28
 - isolation, 54
 - justice, 235, 238, 251
 - media, 306, 312
 - media networks, 315
 - nature of man, 155

- networking sites, 315
 - networks, 49, 91, 249
 - perception, 8
 - policy, 7
 - skills, 40
 - software, 305
 - status, 34
 - support, 26, 30, 241, 247–249, 252
 - withdrawal, 57
 - workers, 252
 - Socialization, 311
 - Socio
 - cultural adaptation, 198, 205
 - cultural adjustment, 37
 - economic apartheid, 129
 - economic diversity, 127, 130
 - Sociologists, 30
 - Sociology, 2, 43
 - Sojourners, 30–31, 36, 40, 88, 94, 96, 98, 194–195, 208
 - Sojourning, 196
 - teachers, 6
 - Soldiers, 24, 30
 - Solomon Islands, 130
 - Somali, 151
 - Somatic distress, 53
 - Soufriere Hills volcano, 161
 - Soul wounds, 3
 - South Africa, 268, 282, 304
 - South African, 310
 - South Americans, 288
 - South Asia, 48
 - Southeast Asia, 48
 - Southern African Development
 - Community, 135
 - Spain, 13, 37, 39, 235–236, 240, 244, 289
 - Sports, 90
 - Spouse, 30
 - Sri Lanka, 47, 50, 54–55
 - Sri Lankan Index of Psychosocial Status
 - for adults, 48, 54
 - for children, 47–48
 - Stabilization (career stage), 262
 - Stage theory, 108
 - Stateless persons, 154
 - State-sponsored economies, 90
 - Static websites, 311
 - Statistics New Zealand, 281
 - Stereotypes, 212, 215–216, 228, 288, 293–294
 - Stereotypic, 107
 - Stereotypical, 107
 - Stereotyping, 6, 288
 - Stochastic
 - analysis, 13
 - outcomes, 8
 - Story-telling tasks, 50
 - /free-listing, 54
 - Strain, 31
 - Streaming audio, 305
 - Stress, 23, 28, 31, 40, 55, 97, 138, 162, 177, 194
 - adaptation-growth model, 34
 - coping and adjustment process, 40
 - tolerance, 26
 - Stressors, 49, 54
 - Structural
 - equation modeling, 205
 - labor market, 264
 - Structural variables, 8
 - Structured
 - employment interviews, 284
 - workplace selection, 145, 294
 - Students, 3, 5, 23, 25, 30, 36, 127, 228
 - Subjective career, 262
 - Subject-matter-experts, 137
 - Sub-Saharan Africa, 134, 281, 316
 - Substance use, 7
 - Subtractive cultural identity, 117
 - Subtractive identity, 118
 - Sudan, 260
 - Super-ordinate goals, 14, 228
 - Surface-level traits, 288
 - Survey research, 289
 - Sweden, 205, 236, 292
 - Swiss-List.com, 311
 - Switzerland, 39, 224, 236
 - Sydney, 269
 - Symptom-focused coping, 177
 - Systemic
 - discrimination, 68
 - expectations, 69
 - Systems view, 13, 176
- T**
- Taboo, 127, 135
 - Taiwan, 178
 - Taiwanese, 221
 - Talent
 - flow, 106, 125, 143–144, 259, 308
 - flow program, 142, 144
 - gains, 312
 - losses, 312
 - Taliban, 51
 - Tamil, 55, 57
 - Tanzania, 134

- Task interdependence, 130
- Tax, 221
- Taxation, 224
- Taxi drivers, 307
- Teachers, 43, 215, 261
- Teams, 291
- Teamwork, 129
- Technical
 - ability, 26
 - advisors, 6
 - assistance, 126, 129, 317
 - cooperation, 126–127
- Technicians, 106
- Technological development, 9
- Technology acceptance, 301, 303
- Televisions, 303
- Temporary travelers, 94
- Terrorism, 24
- Teutonic, 37–38
- Teutons, 38
- Text messaging, 14
- Thailand, 92
- Theories
 - espoused, 127
 - in-use, 127, 138
- Therapeutic services, 62
- Therapists, 91
- Third World, 273
- Time, 226
- Time-bound, 39
- Token status, 292
- Tonga, 142, 308
- Tourism, 196
 - motivation, 94
- Tourism, 9–10
- Tourists, 3, 10, 30, 94, 95
- Trade blocs, 134
- Trade at Hand, 313
- TradeNet, 314
- Trafficked sex workers, 70
- Trafficking, 12, 71
- Training, 2, 7–8, 43
- Traits, 8, 11, 42
- Transcendence, 161
- Transferability, 176, 283
- Transformational
 - psychology, 74
- Transition model, 34
- Transnational networks, 307
- Trauma, 57, 68–69, 157
 - psychopathology, 67
 - related distress, 50
- Traumatized children, 12
- Treatment bias, 134
- Tsunami, 55, 57
- Turks, 205–207
- Turnover, 131–132
- Twitter, 306, 314
- Twittering for charity, 315
- Tyrannies of distance, 318
- U**
- U curve, 23, 28, 33–34
- Uganda, 50, 130, 134
- UK, 225
- Uncertainty avoidance, 23, 35
- Unconscious preferences, 14
- Under-employed, 125
- Under-employment, 12, 14, 138, 221, 279–281
- Undiscussable, 135
- Undocumented new settlers, 72
- Unemployed, 281
- Unemployment, 54, 138
- UNICEF, 168
- United Kingdom, 68, 260, 281
 - government, 164
 - Home Office, 166
- United Nations, 5, 153, 273
 - Conference on Trade and Development, 302, 304, 309
 - Development Programme, 125–126
 - Educational, Scientific and Cultural Organization, 302, 311
 - Environment Program, 313
 - High Commissioner for Refugees, 48, 152, 154
 - Human Development Programme, 2, 5
 - Human Development Report, 1
 - Online Volunteering Service, 316
 - Volunteers, 317
 - World Food Program, 315
- United States, 3, 65, 70, 88–90, 98, 140, 219–221, 236, 268, 288–289
 - Peace Corps, 4
- University
 - of Malawi, 129, 159
 - of Oxford, 64
 - of Pittsburgh students, 90
- Unsafe housing, 54
- Unstructured employment
 - interviews, 284
- Urban
 - areas, 93, 97
 - neighborhoods, 237

- US, 204, 221
 - Committee for Refugees and Immigrants, 48
 - students, 91
- USA, 5, 151–152, 225, 267, 274
- Utilitarian, 75

- V**
- Validity, 47, 50, 54, 283–284
- Values, 3, 26, 42, 73, 97, 107, 129, 131, 143, 152, 181, 196, 235, 287, 290, 292
 - conflicts, 73
 - differences, 40
 - gap analysis, 182
- Vertical segregation, 281
- Vicarious traumatisation, 62
- Victim blaming, 251
- Video, 305
 - games, 315
- Vietnamese, 205–207
- VillageNet Scheme, 304
- Virtual
 - collaboration, 311
 - expertise, 313
 - immersive environments, 315
 - mentoring, 310
 - space, 267
 - teams, 35
 - volunteerism, 316
- Vocational
 - guidance, 11
 - psychological, 265
- Volcano, 161–162
- Voluntariness dimension (in acculturation), 194
- Voluntary Evacuation Scheme, 161
- Volunteering, 30
- Volunteers, 23, 315, 318
- Vulnerable clients, 61

- W**
- Wage differences, 6
- Waka, 2
 - hourua, 2
- War-related
 - torn, 315
 - trauma, 54
 - violence, 49
- Wars, 10, 49, 53, 211, 223, 236
- Water, 315
- W curve, 23, 28, 33–34
- Web, 0, 2, 305, 312–315
- Web cams, 305
- Webinars, 305
- Welfare fraud, 70
- Wellbeing, 2, 8–9, 13, 15, 49–51, 55, 57, 74, 138, 152, 156, 165, 198, 214, 221, 223–236, 238–239, 241, 244, 247–249, 250–253, 301
- Wellington, 260
- West Africa, 313
- Western
 - European countries, 175
 - expatriates, 174, 176–180
 - psychiatric framework, 49
 - union moneygram, 310
- Widows, 53
- Wife, 98
- Wikis, 305
- Win-win, 134
- Woman, 105, 312
- Women, 67, 78, 91–93, 100, 114, 159, 224
- Women's
 - career identity, 118
 - wellbeing, 120
- Word-of-mouth, 283
- Work
 - adjustment, 181
 - behavior, 38, 139, 141
 - centrality, 5, 11, 90, 93–94, 100
 - climate, 8
 - engagement, 132
 - justice, 129
 - justice theory, 130
 - licence rental, 71
 - license exchange, 71
 - related roles, 262
 - samples, 283
 - sample tests, 284
 - stress, 35
- Workforce, 212, 267, 292
 - demographics, 279
 - retention, 79
- Working sojourn, 23
- Workplace, 125–126, 132, 239
 - Innovation, 14
- Work psychology, 125
- World
 - hunger, 318
 - Summit on the Information Society, 302
 - Summits, 304
 - Wide Web, 305

X

Xenophobia, 12
Xenophobic, 220

Y

Yemen, 260
Young people, 55
 wellbeing, 55

Youth, 13, 54–55, 57, 202–203,
 205–207, 209

YouTube, 306

Z

Zero-sum beliefs, 289
Zimbabwe, 268