



The view from the field: A case study of the expatriate boundary-spanning role[☆]

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ARTICLE INFO

Keywords:

Expatriate assignment
Expatriate performance
Boundary-spanning
Role theory
Organizational adaptation
Case study research

ABSTRACT

Research suggests growing interest in the boundary-spanning role played by expatriates in supporting organizational learning and adaptation in uncertain environments. However, efforts to examine this role have relied on conceptual frameworks that have not been empirically grounded. This exploratory case study of 79 expatriates in the field applies a qualitative methodology to elaborate and extend current conceptualizations of the boundary role to the work of the expatriate. Findings suggest that interpersonal relationships may be the cornerstones of the role and the enablers of other cross-boundary resource exchanges.

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1. Introduction

In today's global economy, organizations are increasingly establishing an international presence and relying on expatriate staff to manage or transfer skills to their international operations. Research suggests that these enterprises, both public and private, encounter challenges operating in unfamiliar environments, including difficulties in dealing with governments and local partners, managing local staff, or in tailoring products and services to local tastes cultures, and business systems (Lord & Ranft, 2000). The need to adapt to dispersed and uncertain task environments thus seems a challenge faced by virtually all international organizations.

Thompson (1967) maintains that, under conditions of uncertainty, organizations adapt by increasing their linkages with the external environment to support the inward flow of information and to exert outward control over clients, suppliers, partners, and others in their task environments. Conceptually, these linkages occur at inter-organizational boundaries, and are effected whenever organizational members engage in transactions with external agents (Kahn, Wolfe, Quinn, Snoek, & Rosenthal, 1964; Organ, 1971). It is through the agency of such boundary-spanning employees that the organization is able to gather local intelligence and exert influence over external constituents in pursuit of organizational objectives (Adams, 1976; Thompson, 1967).

Given the strategic importance to the international organization of forging linkages with the local environment, it would seem that the boundary-spanning role would be the focus of a good deal of attention in the expatriate literature. Although the literature has addressed what appear to be *aspects* of the boundary role, rarely has the research been framed from the theoretical perspective of the role. Research on knowledge management, for example, has attended to the informational aspects of the expatriate's role in the transfer of knowledge across boundaries (Hocking, Brown, & Harzing, 2007; Nigel, 2002). Research taken from the social network perspective has recognized the role of the expatriate in establishing informal networks (Harzing, 2001; Michailova & Worm, 2003). Caligiuri (1997), in developing a model of expatriate performance, included such indicators as the ability to represent the organization to customers, transfer information to the parent company, and develop rapport with host nationals. These varied topics clearly reflect boundary activities, but have not been framed as such. It would appear that the expatriate's responsibility for linking the organization to the host country is so central a part of the job that researchers have taken its boundary-spanning component as given, and have begun to examine isolated aspects of the role without adequate theoretical development of the boundary-spanning construct itself.

Where research has explicitly applied a boundary-spanning framework to the work of the expatriate (e.g., Au & Fukuda, 2002; Thomas, 1994), it has relied on typologies of the boundary role (Ancona & Caldwell, 1988, 1992) derived from observations of product development teams working across internal organizational boundaries. The suitability of these typologies to the complex work of the expatriate across external boundaries has not been empirically established.

Indeed, the international management literature has exhibited a relatively low level of interest in micro-level phenomena in general. Werner (2002), in a review of 271 international manage-

[☆] The authors wish to thank the political officers and executives of the Canadian Department of Foreign Affairs and International Trade for participating in this research. Thanks are also extended to the editor of JWB and three anonymous reviewers for their insightful comments on an earlier draft of this manuscript.

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¹ This research was conducted by the first author while a doctoral candidate at Carleton University, Sprott School of Business.

ment articles published in top tier journals between 1996 and 2000, identified only 16 that had used the individual expatriate as the unit of analysis. Of these, the majority focused on cultural adjustment and withdrawal intentions. Studies addressing work-related behaviours were comparatively rare.

We therefore know little about the nature of the boundary role in international settings or what individual employees might need in order to be effective in this role. This exploratory case study applies a qualitative methodology to elaborate and extend current conceptualizations of the boundary role to the special case of the international assignment. A boundary role framework may provide the theoretical umbrella needed to view the broader spectrum of boundary activities in which the expatriate engages, and may expand the criterion space (Harrison & Shaffer, 2005) for measuring expatriate performance. In turn, the framework may suggest mechanisms for supporting expatriates in their linking roles abroad and respond to recent calls for greater attention to individual-level phenomena in international management research (Au & Fukuda, 2002; Bartlett & Ghoshal, 1991; Birkinshaw, 1997; Werner, 2002), and, in particular, to the actual work behaviours of the expatriate while on assignment (Harrison & Shaffer, 2005).

2. Previous research on the boundary-spanning role

2.1. Theoretical origins

The boundary-spanning concept is rooted in two theoretical perspectives: open systems theory (Katz & Kahn, 1966; Thompson, 1967) and role theory (Kahn et al., 1964; Katz & Kahn, 1966). The open systems perspective depicts organizations as interdependent with their task environments, relying on exchanges with the environment to supply inputs to their internal productive systems, and to absorb its outputs (Thompson, 1967). To survive as open systems, organizations need both to maintain the stable functioning of their internal system (a *maintenance* function), and to detect and respond to any fluctuations in the external environment that might pose a threat to the system (an *adaptive* function; Katz & Kahn, 1966). The site of the adaptive function is the organization's external boundary, where boundary-spanning subsystems perform transactions that control the movement of inputs and outputs, and buffer environmental disturbances to protect the organization's core technology (Katz & Kahn, 1966). The adaptive function thus involves a bidirectional movement. In the event of environmental fluctuation, the adaptive function may either exert outward flow to modify external forces, or it may exert inward flow to modify the organization's own structures or processes in response to the needs of a changing world.

Role theory (Kahn et al., 1964; Katz & Kahn, 1966) provides a conceptual bridge for linking boundary spanning at the macro-level to the micro-level boundary-spanning activities of individual organizational members. Role theory depicts organizations as social systems, wherein the behaviours of system members are constrained and directed by the expectations of the various constituents with whom individuals interact in performing their jobs. According to role theory, the expected pattern of behaviour for an individual occupying a given organizational position comprises his or her *role*. The salient constituents with whom the individual interacts in performing the role comprise the *role set*. An individual occupying a position for which some members of the role set are located in a *different* organizational system are said to hold a *boundary-spanning role* (Katz & Kahn, 1966). Role theory thus locates the organization's adaptive function in the activities of individual boundary-spanning employees whose jobs bring them into contact with external agents for the purpose of effecting a transaction. Effective transactions are those which maintain the organization's viability in a complex or shifting task environment (Katz & Kahn, 1966).

2.2. Empirical research on the boundary-spanning construct

Unfortunately, 40 years of research inspired by role theory has not moved in the direction of further examining the nature of the individual boundary role. Instead, researchers in the micro domain have pursued a line of inquiry focussing on boundary spanners' stress response to the simultaneous and conflicting demands emanating from role senders within and outside of the organization (for meta-analyses, see Jackson & Schuler, 1985; Tubre & Collins, 2000). Preoccupation with the stress construct appears to have diverted attention from further specifying the boundary-spanning construct itself (i.e., just what is it that boundary spanners *do* at the boundary, and how might their activities contribute to organizational adaptation?).

There have been few attempts to empirically examine the activities in which the boundary spanner engages. Miles (1976), in an early study of R&D professionals, asked respondents to rate from a list of job activities the extent to which each activity comprised an important part of the job. Factor analysis of the job items yielded a boundary-spanning factor, which included activities directed at external agents (e.g., travelling, letter writing). However, none of the activities reflected direct contact with an external agent, so the classification was not able to shed light on the nature of transactions at the boundary. The classification was also silent on the purpose of activities, so was unable to suggest how the activity might contribute to an adaptive function for the organization.

Conversely, work by Ancona and Caldwell (1988, 1992) focussed expressly on activities at the boundary. In a series of two studies of product development teams in the microelectronics industry, the authors recorded team interactions with a variety of organizational members outside of the teams' boundaries. From these observations, they inductively generated a classification of 15 boundary activities, including securing resources for the team, gathering information, and protecting the team from interference. Factor analysis of these activities yielded a typology of four functional categories of boundary-spanning behaviour. Table 1 summarizes this four-dimension typology.

Ancona and Caldwell's work offers a rich conceptualization of the boundary role, and aligns with the adaptive boundary function as it is conceptualized at the macro-level (i.e., open systems theory). The typology specifies both the nature of each boundary activity (e.g., coordinating work with outside agents) and the adaptive function served by the activity in terms of the productive work of the team (e.g., enabling cross-boundary workflow); hence, the typology suggests the means by which the boundary activities of the team might translate to adaptation at the organizational level. Further, their typology respects the macro-level conceptualization of the boundary construct by capturing the bidirectionality of boundary exchanges (e.g., scouting, which enables an inward flow of information, and ambassador, which exerts an outward flow to persuade and lobby). Ancona and Caldwell's typology – although based on the team as the unit of analysis, and transactions across *internal* organizational boundaries – provides a useful starting point for conceptualizing the boundary role at the level of the individual. We return to their work in discussing our methodology.

2.3. Research on the expatriate boundary-spanning role

A search of the expatriate literature identified two studies that had positioned the work of the expatriate within a boundary-spanning framework. Both relied on Ancona and Caldwell's (1992) typology to conceptualize the boundary role construct. The first (Thomas, 1994) is theoretical. The second (Au & Fukuda, 2002) is empirical.

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