

# Looking out for the Moral Career: Expatriates' Identity Work in Reverse Knowledge Transfer.

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**Abstract:**

*In the last decade, researchers have shown that MNCs need to reverse knowledge transfer to secure their competitiveness in the global market. Lately this has been studied through re/expatriates. This study presents two exemplary cases from a study of 64 interviews conducted in 5 of the largest Danish MNCs. The purpose of this paper is twofold. First, to understand the role identity work plays in the ability and willingness of expatriates to learn and transfer knowledge. Second, to introduce Life Course Theory as an important methodological contribution with which to capture the entangled relationship between agency and structure within reverse knowledge transfer. Third, to develop and extend the current theoretical and methodological frame that govern the research of knowledge transfer. The present study indicates that institutionally generated organisational frames and work organising practices develop and feed certain power structures and communities, which influence the possibility of agency and as a result reverse knowledge transfer. The findings of this study stress that: 1) power is as an important productive force in identity work: consequently, it has the ability both to hinder and spur the processes of transformative learning and reverse knowledge transfer; 2) reverse knowledge transfer can be hindered by the lack of transformative learning in the single individual.*

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Keywords ; MNCs, expatriates, reverse knowledge transfer, identity-work, life-course theory, moral career

## INTRODUCTION

Within International business (IB), a significant aspect of research has focussed on expatriation as a vehicle with which to control subsidiaries, transfer knowledge and develop the individual's cross-cultural competencies for internationalisation strategies (Bartlett & Ghoshal, 1992). Both research literature and practitioners stress the fact that the relationship between headquarters and subsidiaries has changed dramatically over the last decades in terms of knowledge transfer. Today's globalised work environment demands that the expatriation creates transformative learning in cross-cultural situations in order to ensure reverse knowledge transfer. The management literature identifies the troublesome experiences of expatriation as a fertile site for transformative learning and as a vehicle for the development of cross-cultural competencies (Bird, 2001; Osland, 1995). Yet learning research states the paradox that implacable and distorting experiences sometimes reinforce instead of altering cultural stereotypes (Mezirow, 1997:7) as well as create resistance to learning (Illeris, 2004). Scholars in many fields have shown that identity work plays a vital role in hindering or facilitating transformative and innovative learning processes (Blasco, Egholm Feldt and Jacobsen, 2010; Jarvis 2005; Weick 1995). Identity work directs our attention to the reciprocal processes between social role expectation and processes of cognitive identity defined by the social anthropologist Erwin Goffman (1959, 1961) as a *moral career*. In the Life Course Theory perspective, Goffman's concept has played a central role, especially concerning life course analysis of transformative learning and change (Blasco 2009, Heintz 2001).

This paper has a twofold purpose. First, to understand the role identity work plays in reverse knowledge transfer through two exemplary cases from a study of 64 interviews conducted in 5 of the largest Danish MNCs. Second, to introduce Life Course Theory and the concept of *moral career* as a useful and important methodological

contribution with which to provide insight into transformative learning processes and knowledge transfer situated in border-crossing situations.

First I will describe why reverse knowledge transfer requires transformative learning processes and how that is linked to identity. Second, I will present the data material and in length introduce the life course perspective (LCP) and the concept of moral career that inform my data collection and analysis. Thirdly, I present my findings through the use of two cases selected from the cohort. Thereafter I briefly discuss the study's limitations and the implications in terms of practical consequences and future research. Accordingly, this paper aims to make theoretical, methodological and empirical contributions within the reverse knowledge transfer research in the IB field.

### **REVERSE KNOWLEDGE TRANSFER AND TRANSFORMATIVE LEARNING**

Recent research literature has shown that a very important tool for increasing productivity in larger multinational companies (MNC) is the ability to manage knowledge transfer and learning in a continuously changing border-crossing context (Doz, Santos & Williamson, 2001; Egholm Feldt & Lotz, 2010; Lorenz & Valeyre, 2003; Chesborough, 2003; Lotz, 2009). Consequently, Birkinshaw, Ghoshal, Markides, Stopford, and Yip (2003) and Cantwell and Mudambi (2005) show that MNCs can no longer rely on one-directional transfer strategies and are now moving to multi-directional modes of learning (Doz, Santos and Williamson 2001, Eden 2009). While one-directional transfer strategies necessitate cross-cultural competencies to ensure that knowledge is absorbed into subsidiaries, reverse knowledge transfer requires cross-cultural competencies to ensure transformative learning. Where expatriates were previously used to secure one-way knowledge transfer, they are now supposed to nourish reverse knowledge transfer and transformative learning.

Also the form of knowledge has undergone a development. It is not enough to transfer knowledge from the headquarters to the subsidiaries. Today, useful knowledge about strategic decisions on work organising practises, product development and market development and maintenance is developed through the encounter between headquarters and subsidiaries. This reverse knowledge transfer is rendered crucial for creating innovative and sustainable solutions for both the headquarters and the subsidiaries.

Recently, researchers have studied reverse knowledge transfer and learning through expatriates (Eden 2009). In particular the research has focussed on the single individual's learning and repatriation (Furuya, Stevens, Bird, Oddou and Mendenhall, 2009; Lazarova & Tarique, 2005). As these studies also emphasise, reverse knowledge transfer can only take place if learning occurs. Expatriate learning on site is learning through distorting and unfamiliar experiences and can be categorised as transformative learning. If reverse knowledge transfer is to be analysed seriously and the range of its implications considered, the transformative learning perspective is relevant as a factor in the analysis.

### **Transformative learning and experience**

In this paper I will take transformative learning as the point of departure. Perspectives of transformative learning agree that learning is a process in which new disturbing experiences are incorporated into already existing frames of references and meaning. As a result, the existing frame is challenged to a greater or lesser degree (Dewey, 1938; Illeris, 2004: 31; Peirce, 1931, 1877; Mezirow, 2000). Additionally, many theories of transformative learning both explicitly and implicitly include the notion of a gap, a rupture or a conflict (Dewey, 1938; McWhinney & Marcos, 2003; Mezirow, 1997; Peirce, 1877). The gap is felt when certain experiences are not understandable and intelligible within already used frames of understanding. As a result, the gap in comprehension generates a crisis on the one hand, and motivates people to eliminate the gap through transformations of existing frames of references

and understanding on the other (Dewey, 1938; McWhinney & Marcos, 2003; Peirce, 1932:21). When existing frames of references are transformed, the sense of self is also transformed, as stated by Mezirow: *“Our values and sense of self are anchored in our frames of references. They provide us with a sense of stability, coherence, community, and identity”* (Mezirow 2000:18). Consequently, transformative learning always includes some alteration or, more radically, a change of the frame itself, which results in some transformation of the sense of self and its identity position. *“Transformative learning involves experiencing a deep, structural shift in the basic premises of thought, feelings, and actions. It is a shift of consciousness that dramatically and irreversibly alters our way of being in the world. Such a shift involves our understanding of ourselves and our self-locations....”* O'Sullivan, E. (2003)

### **Resistance to Learning**

Exposure to other and distorting cultures has often been seen as the answer to facilitating and motivating transformative learning processes. Considering the needs of companies for employees with these capacities, expatriation has seemed to offer the perfect solution, as it definitely generates frustrations and experiences of structural shifts in the basic premises of thought, feelings, and actions. Nevertheless, this is not always the case, as noted both in the literature and voiced by the interviewees in this study. Lisbeth, an earlier expatriate and now HR manager, from Company 2, states: *“We can easily meet people, who were expatriated and who hated it all the way through, who never dined with any of the locals or whatever... so they haven't learned anything by it.”* Also Peter from Company 3, an earlier expatriate and now HR manager in one of the company's largest and most diverse regions points at this problem; *“There are many people who have .....many international experiences – hard-core business experiences – but they often face problems. And it is not because they haven't been abroad half of their lifetime, but they seem to lack empathy”.*

Oddou, Osland and Blakeney, (2009) have hypothesised that reverse knowledge transfer depends on both the individual's ability and willingness to learn and transfer these learning experiences and the organisation's ability and willingness to receive these transfers. Based on these findings and hypothesis, the purpose of this study will be to focus on understanding the role identity work plays in the ability and willingness of expatriates to learn and transfer knowledge.

### **Experiences, Learning and Identity Work.**

To understand the ability of expatriates to learn, we need to explore not only their prior experiences and expectations but also what motivates them to learn when they are challenged by unfamiliar and distorting experiences. The way we make sense of experiences is affected by how we constantly reshape our identity positions (Weick, 1995: 20). As such, we are at the same time embedded in both social role expectation and internalised in processes of cognitive identity formation vis-à-vis external and internal identity (Stryker & Burke, 2000). The relationship between external and internal identity is not the relation between two separate entities, but a continuously ongoing dynamic creation of what Goffman (1959, 1961) defines as the individual's *moral career*. Thus, identity positions are always established in relation to acceptable positions within a given social context (Goffman, 1959; Weick, 1995: 13).

Research on learning and motivation indicates that external and socially available identity positions are vital factors (Blasco et al., 2010). Hence, the social context and its available and legitimate identity positions play an important role in endorsing or delimiting the motivation to learn. While other studies have operated with a multiplicity of definitions on learning and knowledge and stated the difference between generic and specific knowledge (for a very informative review see Oddou, Osland and Blakeney, 2009), I will study learning from an exclusively transformative learning perspective with the focus on generic knowledge.

## **THE LIFE COURSE PERSPECTIVE, DATA MATERIAL AND RESEARCH STRATEGY**

While mainstream literature on reverse knowledge transfer contributes with important insights into the organisational learning within MNCs, it has typically considered the aggregated company level while investigating how organisational members actually learn. The majority of cross-cultural studies have generally relied on a large cross-national perspective employing quantitative methods because they are thought to deliver more rigorous explanations (Hofstede, 1980; House, 2004). In contrast to these aggregated levels of analysis, I will take as my point of departure a life course perspective (LCP) that links individual lives with institutions and the societal levels. In recent cross-cultural studies, a tendency to take recourse in a somewhat stable entity - the individual - as the methodological unit has taken place in order to capture dynamic instability and change. However, while such studies avoid the use of aggregated data as useful predictions of individual behaviour, they still need to engage in a broader framework to qualify understanding of structuration. Along with many humanistic and sociological inspired perspectives, Life Course Perspective (LCP) employs analytical strategies involving both a reformulation and a reconceptualisation of the relationship between agency and structure (Hitlin & Elder, 2007). This enables me to offer fine-grained accounts of how identity work affects learning and knowledge transfer within the relationship between agency and structure, experiences and discourses. Through LCP this paper will provide meaningful insights into transformative learning processes by empirically tracing former and present expatriates' use of identity work in boundary crossing situations. As such, the paper will integrate not only the flexible and changeable contexts, but also the inscription of meaning as an interrelated process between the individual and the relevant context.

## **The Life Course Perspective (LCP)**

The life course perspective was established as a theoretical entity in the 1960s (Elder, 1998). Today it is broadly recognised and used within the social sciences. LCP was developed as a tool for analysing how key societal and historical changes affect people's lives. It displays a specific interest in the intertwined relationship between the specific geographical location and socio-historical spaces of constraints and opportunities a person's action is regulated by. A major interest within LTC is to recognise the element of human action as not purely structured, but instead as both individual and social at the same time. LCP has the overall endeavour of offering concepts and tools to describe and understand the interrelation between human agency and institutional structures and changes (Elder, 1998:2). Consequently, LCP is occupied with the role played by cohort, generation and history, as well as institutional development in individual lives. The following sections introduce the core concepts of LCP, *experience and expectations*, *transitions* and *linked life*, and examine how these concepts relate to define the research question, develop the research strategy and select the data material.

### **Experience and Expectations: an entry to transformative learning**

As its point of departure, LCP rests on the notion that the choices and behaviour of every individual are influenced by previous experiences and that individuals, throughout their lives, change and develop. From this perspective, all life-periods should be understood as an extension of past and future equally, as they are related to both earlier experiences and future plans and goals (Mortimer & Shanahan, 2003). To generate data material about the relationship between what the individuals perceived as known and familiar and what was new and unfamiliar, I posed questions to the interviewees about their expectations and experiences

during their expatriation. Consequently, this produced a very important entry into transformative learning processes, distinguishing between what was already there from earlier experiences (seen in their expectations) and information, and what was added from outside through concrete encounters and experiences (Dewey, 1938; Peirce, 1931; Illeris 2004: 31). The relationship between past experiences and future expectations is displayed in the sense-making of the present and can be detected through descriptions and explanations in narratives of individuals' life stories. Accordingly, adequate data material was generated through the expatriates' narratives.

### **Transitions and research strategy**

As with most learning theories, LCP relies on the fact that experiences of specific and important events and transitions in earlier life have a great impact on how experience and events can be handled and understood later on. To identify specific and important events, *trajectories, transitions and turning points* are important analytical concepts within LCP (Elder, 1994:98; Giele & Elder, 1998). The concepts refer to periods of lesser or greater control over life and the relationship between goals and resources (advancement, change of career, culture shock, for example) that change and reshape people's lives (Heinz & Marshall, 2003:102). The concepts are useful as analytical guidelines for studies as they direct attention to events that create changes. Identifying *transitions* assists in establishing the most sensitive periods in an individual's life. As such it enables the researcher to focus both on how people themselves identify events as important in their lives, and on how transitions reveal the way in which individuals operate in relation to various spheres and to their significant others (Heinz & Marshall, 2003:100).

Whereas LCP has most often been employed in social science by sociological longitudinal analysis of social groups (Crosnoe & Elder, 2002; Elder, 1974, 1994; Gupta,

1995), its use in business studies has been rather limited. One reason for this is that interviewees in business studies research are not the typical cohort for LCP based interviews, given that the business world's changeable character reduces the opportunity for following the same individuals in the same company during their entire lifespan. Another is that the traditional business interviews rarely encompass individual lifespan as a unit of analysis. Nevertheless, I have applied core elements and key concepts from LCP to the interview guide in order to expand and transgress traditional business interviews, and especially to establish context-sensitivity to the interrelation of external and internal identity work. Although the present study does not involve concrete longitudinal studies, an emphasis on studying managers as people with a past is central to this study of transformative learning processes. For this purpose the questions posed mainly focussed on the expatriates' prior experiences and expectations, as well as on their actual experiences of expatriation.

While I have abstained from a longitudinal analysis and from questioning my interviewees about their entire life stories, I did ask them to tell their life stories in relation to their expatriation. Consequently, I identified and placed the expatriation as a framing *transition*, and asked them to concentrate on what they had experienced in/expected before their expatriation. While this strategy did diminish the interviewees' own identification of transition periods, it provided a strong emphasis on their frame of references and understanding of their expatriation and its relation to their lifespan, and thus how it affected their identity work.

### **Linked Life**

The empirical material analysed below consists of semi-structured in-depth interviews with present and former expatriates in five MNCs based in Denmark. During the autumn of 2008 and winter 2009 the research team carried out the first round of interviews at the Danish head

quarters. The interviews were conducted in pairs, with two researchers on location in each of the five MNCs. The researchers applied the same interview guide to retain information and narratives from the interviewees. Two types of interview guides have been developed, with the first one designed to conduct informative interviews with 33 HR managers, and the second for 31 LCP inspired interviews with re/expatriates. The LCP interviews were conducted exclusively with present or former expatriated managers and CEOs at different levels. This choice both limited and qualified the cohort. Selecting expatriated managers limited the study to employees, who specifically needed to learn to reverse knowledge transfer in border crossing situations.

Through the informative interviews and secondary material provided by the companies and LCP questions about demographic issues, I generated a characteristic of the cohort. The data material made it possible to generate knowledge of how demographic factors influenced expatriates' experiences; it also allowed a demographic typology of the cohort to be established. A general social map of the interviewees was drawn, involving family relations, life stage, sex, age and education as well as previous work positions. In order to map the linked life of the interviewees, they were asked to reflect upon whether their family, colleagues, social networks, for example, had influenced their choice of expatriation.

This served a twofold purpose: first, to establish and concretise how managers operate in various spheres and in relation and interdependence to other "significant" others. Managers are often studied as a "technical position" in a company. This only provides attention to role expectance and thus external identity in a limited locus, their working unit. I wanted to stress that managers are at the same time flesh and blood people, influenced by many different communities in which they take part and hence emphasise how their positions are linked to the lives of others in a broad sense. The concept of *linked lives* is a core element in LCP. The concept generates a strong emphasis on the *relational* and *interdependent* nature

of human lives. It characterises a fundamental principle within LCP: that lives are lived in relation to others in social contexts and that it therefore is impossible to study peoples' learning abilities and motivations without calculating the impact of significant others. Within LCP, the concept of *linked lives* is a tool which aids the discovery of the variety of contexts and communities in which the single individual is situated; it also functions as a lens showing interrelations between the individual and their contexts, thus outlining the capacity of agency (Elder, 1998:6; Heinz, 2001).

Second, the purpose of the research was to gain access to the influence which identity work had on the managers' learning processes. The access was provided by studying how the positions as managers are concretised in specific and interdependent individuals who are exposed to a variety of social roles in a variety of social contexts and how this influences their motivation and learning processes. With a focus on *linked lives*, I underlined that interactions with significant others are always embedded in social contexts. As the social anthropologist Erving Goffman states: "*The self arises not merely out of its possessor's interactions with significant others, but also out of the arrangements that are evolved in an organization for its members*" (1961:148).

### **Cohort Selection and Demographic Topography**

The selection of MNCs was based on several criteria: they were "old" Danish companies which had started out as small manufacturing firms. They had all gone through a transformation from home market to internationalising strategies and the formation of subsidiaries, mostly in Europe and USA. Until recently they displayed their Danish origin and values as their specific competitiveness which they to some extent exported during the internationalising strategies. Based on the increasing globalisation within the business environment, all of the MNCs were currently engaged in developing global strategies and

expanding production, sales and development in the Asian market. Thus, the interviews were conducted in a period where the MNCs and their expatriated “....*felt they were required to become global players in a globalised world full of global competitiveness*” (Manager, Company 3). The selection of companies provided a cohort which needed to develop further their ongoing practice of reverse knowledge transfer strategies. The research group gained access to the MNCs through their official channels and from the relevant HR departments, which dealt with all aspects of expatriation. In the HR departments we selected and interviewed relevant managers related to the expatriation process both by the snowball effect and by studying their organisational charts showing different areas of competencies. The expatriated were selected from the companies’ lists of current, former and future expatriates. We interviewed all available expatriates located in Denmark during the period of study. They were selected according to the criteria that they had held a managerial position during their expatriation or that they were currently leaving for or returning from an expatriation<sup>1</sup>.

The geographic space of the cohort was situated around Denmark; most of the expatriates had left the country for subsidiaries/ hubs affiliated with Danish-based MNCs. A smaller group were repatriated to the head office in Denmark or expatriated from one subsidiary to another. As a result of the companies’ new development strategies, the expatriated workers mainly went to different countries in Asia (60 %) but Eastern Europe (17%) and the USA (15%) were also frequent destinations. The demographic topography of this cohort falls into two different life-stages: young people or couples who used the expatriation as maternity leave/family establishment with small children (70%), and older couples with teenagers or older children (30%). More than 90% of the cohort consisted of expatriated males, and an overall percentage (85 %) of the expatriates had previously had some experience with expatriation or had been exposed to it through their family background.

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<sup>1</sup>The next round of interviews in 2009 was conducted at the expatriates’ current posts at the subsidiaries. This study is only based on the first round of interviews conducted in Denmark.

Consequently, only the expatriates with experience of more than one international assignment were selected within the cohort. The expatriation always involved an immediate career promotion. It was due to the employees' specific technical skills or/and management qualities and introduced and expected greater managerial abilities and responsibilities than in their previous positions in Denmark. However, the promotion had not always paid off when the expatriation period was up. The cohort predominantly had university degrees, also if they were originally trained in technical education. More often than not, it was their direct superiors who asked them to go abroad.

### **MORAL CAREER AND METHODOLOGY**

This paragraph will first introduce Goffman's (1961) concept of *moral career* as the core concept of the present study, which synthesises LCP's central concepts (*experience and expectations, transitions and linked life*) and conceptualises the relationship between transformative learning and identity work. Then the methodological use of interviews will be discussed, and finally specific tools for providing an insight into the narratives will be presented.

#### **Moral Career.**

LCP's core concepts, *experience and expectations, transitions and linked life*, can be synthesised into Goffman's concept of *moral career* (Goffman 1959: 123; 1961: 123).

Goffman conceptualises the relationship between the self and the *moral career* in the following way:

*“Each moral career, and behind this, each self, occurs within the confines of an institutional system, whether a social establishment such as a mental hospital or a complex of personal and professional relationships. The self, then, can be seen*

*as something that resides in the arrangements prevailing in a social system for its members. The self in this sense is not a property of the person to whom it is attributed, but dwells rather in the pattern of social control that is exerted in connection with the person by himself and those around him. This special kind of institutional arrangement does not so much support the self as constitute it”* (1961: 123).

Consequently, *moral career* engages with the entangled connection between the person’s own image and sense of self and possible roles of social identity, thus social roles and cultural norms within public accessible institutional complexes (Goffman, 1961; Heinz, 2001; Blasco 2009:4). As such, *moral career* reflects the interrelation between the external and the internal identity work from a single individual’s perspective. The concept of *career* authorises a continuous movement between the personal and the public, between the image of the self and the felt identity (Goffman 1961:119) and its significant society (Goffman 1961: 127).

Although the significant society establishes conditions for adaptation, it still allows for different ways of meeting them. In fact, a person can employ different approaches of adaptation at different phases in his/her *moral career* and may even fluctuate between them at the same time. The *moral* aspect of a career comprises the changes that the career causes in a person’s self and the frame of judgment applied. A transition can be understood as a radical shift in someone’s *moral career* which will affect the belief a person has about him/herself and significant others and as such be a transformative learning process. Goffman also underlines the importance of experiences in transitions:

*“The moral career of a person of a given social category involves a standard sequence of changes in his way of conceiving of selves, including, importantly, his own. These half-buried lines of development can be followed by studying his*

*moral experiences - that is, happenings which mark a turning point in the way in which the person views the world...* “ (1961:123)

Thus, the intertwined relation between internal and external identity work in transformative learning processes can fruitfully be studied through the concept of *moral career*. In contrast to Goffman's concept of scene, scripts and front stage which is met by observations of peoples' actions in concrete situations, the concept of *moral career* is fruitfully applied within life course interviews. The interviews will, unlike observations, provide an insight into changes in peoples' perceptions and beliefs about themselves and their significant others, as well as show how different approaches of adaptation at different phases affect the belief a person has.

While LCT stresses the relation between individual agency and institutions, the concept of *moral career* stresses how agency and structure affect transformative processes and encompasses past experiences and future expectations. Consequently, *moral career* will be the core concept in my studies and the guiding principle through the collection of data material and analysis.

### **Life Stories and Narrations: a methodological perspective**

With Plummer (Plummer, 2001) the interviews used in this study can be labelled *researched life stories*, signifying that they were conducted in a specific framework with a specific purpose, in which the interviewees were invited to tell their stories without promising anything more than anonymity. The researcher's role in this activity is crucial: we select, assemble and frame their stories (Clifford & Marcus, 1986; Denzin, 1997; Geertz, 1993). The material was obtained through semi-structured, in-depth interviews to obtain coherent narratives. Although LCP interviews provide the opportunity to extract factual information about the interviewees' demographical status, it was still crucial to obtain narratives, while the relation between human agency and institutional structures and changes cannot be

revealed by quantitative information. Life story narratives are context-specific productions based on contemporary available plots and concepts adequate for the specific context (Du Gay & Hall, 1996; Hall, 2001; White, 1973), thereby enabling us to identify both a range of legitimate and available identity positions as well as the individual's concrete choice of position in the specific situations. As Atkinson states: "*The life story narrative may be the most effective means for gaining an understanding of how the self evolves over time or at least in seeing the subjective perspective on that*"(1998:11).

Hence, life stories are a collective enterprise, and in this study they are used both as *resources* and *topics*, to follow the rhetoric of Plummer (2001:399). LCP interviews generate data which is usable for both perspectives. As *resources*, life stories are used as realistic tales. As such, the accounts provide answers for our questions of relevant contextual information. In our case: factual and quantifiable information about demographic issues, organisational and institutional structures, and identifying significant others who play an important role in the expatriates' choices and lives. In this regard, verification of information is of immense importance. This implies that misunderstandings or troublesome narratives distorting information are carefully taken into account. The reliability of resources was triangulated with a large amount of secondary data material and informative interviews with HR departments and other relevant departments within the MNCs.

As *topic*, the life histories are used to understand the processes in which the narratives are created. In our case, the life stories of the expatriates will inevitably bear witness to the encounter with unfamiliar experience, and generate the possibility of discovering both the internal and external work identity in the distorting situation. Narrating and explaining simultaneously creates a description of the self. In this case I use the narratives to understand how and which experiences and expectations are narrated and as such identified as important events by the interviewees themselves, as well as how they are framed. In

addition, the narratives can endorse knowledge about how experiences colour expectations and vice versa, and consequently bear witness to how identity work is involved in these processes, hence offering insight into concrete learning processes and its embeddedness in specific contexts. When life histories are used as *topics*, facts control and verifications will not indicate reliability. The interpretations of the narratives must be carefully examined in regard to both the narrative's internal logic and its contextual settings. This implies that inconsistent, hypocritical or duplicitous narratives still provide us with relevant information into how trajectories of identity work affect learning processes, and as such the interrelation between human agency and institutional structures and changes.

### **Entering the Material**

I analysed the material through how *moral careers* emerged in the interviewees' narratives when they talked about their expectations and experiences concerning expatriation. Central to this were the descriptions of social communities to which the expatriates referred. These were identified through the use of the pronouns *We*, *Us*, *They* and *Them* in the narrative. Through this, several pertinent figures surfaced through most of the narratives: family, Danes, expatriated, company, host country, host culture/people, Asian. These different identity positions fluctuated between different approaches and were presented quite ambiguously in the narratives and as such used to establish both distance and belongingness to many different communities throughout the narratives at the same time. The ambiguity is a sign of how the *moral career* continuously develops and negotiates the intertwined relationship between structures and agency within everyday experiences.

For a figurative illustration of the relation between the analytical concepts see figure 1.

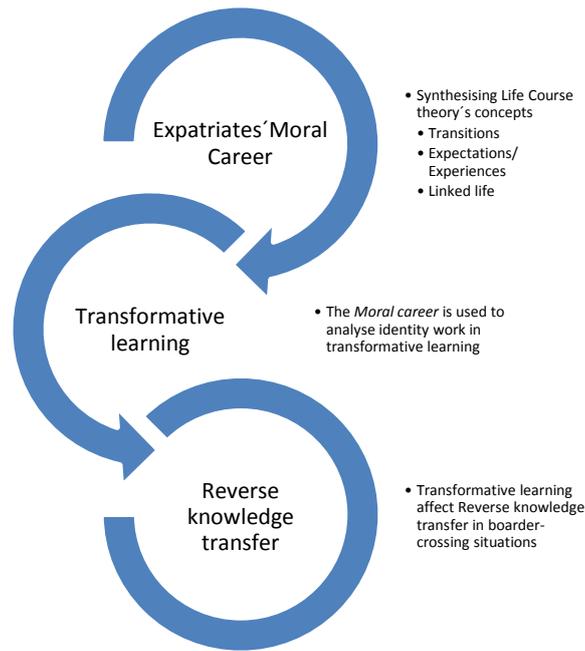


Figure 1

## LIFE COURSE NARRATIVES: UNFOLDING MORAL CAREERS

While investigating the expatriates' development of *moral career* in their narratives of reversed knowledge transfer processes, it became apparent that: 1) power can be seen as a productive force in transformative learning and reversed knowledge transfer; 2) reverse knowledge transfer can be hindered by the lack of transformative learning.

In the following paragraphs, I will demonstrate and discuss these findings with examples from the LCP inspired interviews. The excerpts discussed here have been selected from a corpus of 64 interviews which took place at the companies' headquarters. The semi-structured interviews lasted from one and a half hours to two hours and were recorded and transcribed. I have translated the selected excerpts into English (in which all emphases are mine). The interviews with Danes quoted in the following were conducted in Danish. I will predominately use the narratives of Anders and Jens as examples within the collected material because they are illustrative in displaying the general topics and resources concretised within the corpus of interviews. As such, they represent prototypes both in regard to demographic

typology and the role played by identity work in reverse knowledge transfer. The use of the single individual's narrative to display the analysis provides us with a somewhat stable unit and the possibility of illustrating a contextual in-depth narrative in which the intertwined processes of agency and structures can be heuristically illustrated. This is highly relevant in describing the role played by identity work in transformative learning processes and reverse knowledge transfer.

### **A Narrative of how Distributed Power can spur New Identities**

The following analysis will generate the individual's context by drawing a picture of their concrete typology and mapping their specific linked life. The context will display the institutional outline and thus qualify the discussion into how power relations are interwoven with both agency and structure in transformative learning and reverse knowledge transfer through the central concepts of LCT.

Anders, from Company 2, was a young manager in a Danish MNC expatriated first to Japan and then to Singapore. Anders had no children at the beginning of his expatriation and returned with two small children at the end of his time abroad. His educational background was a university degree in engineering. At the time of the interview, he had been with the company for the last 10 years. His expatriations did function as a career progression and it was his former direct superior who assigned him the responsibility of developing and changing a subsidiary in Japan. Like the other MNCs in this study, Company 2's first Asian subsidiary was established in Japan. It was set up at a time when the Japanese market seemed to be a secure investment. Since the subsidiary produced large return rates, the native employees were given somewhat free rein there. When Anders was expatriated, the Japanese market growth had stagnated.

## **Linked Lives**

For Anders, as for the expatriates in general, their family and especially their wives were the predominant others with whom they discussed the decision to go abroad. Most of the expatriates were occupied with their partners' and families' well-being abroad, as stated: "*... for me it is just another office.... For them it is a total change of life*" (Thomas Company 4). Anders explained that he was asked to leave for Japan and later on for Singapore by his direct superior, who phoned him a Saturday saying; "*You must prepare yourself to leave again very soon*". The first time he was offered expatriation, his wife accepted it with interest: "**We** were not that old, so **she** was just on it immediately [...] **She** is as adventurous as me". However, their experiences of expatriation made them face what kind of expectations they had for their lives. In Tokyo, they lived among the locals. This resulted in frustration and loneliness - especially for Anders' wife. In consequence, the next time Anders was offered an international position, "*... she refused to leave [..] but then she felt sick and tired of the stressful life we lived in Denmark [..] so I contacted my boss saying, "Do you still have an assignment for me?"*" Their life in Singapore was the opposite of Tokyo. They lived in a compound, where "*A lot of expats lived in the lap of luxury, everything is done for you, it is nice, but in the long run it becomes a little.... A few Danes like it and they stay a long time, while others have had enough after 2-3 years*". The compound also creates a nest of network and communities composed mostly of western expatriates. "*This can be difficult as expatriates...you do not choose your friends...they will be the ones you are around. Sometimes I have wondered, why do I spend an entire evening with these people – I would never have done that in Denmark*". After Singapore, Anders and his wife decided not to accept the next expatriation: "*...we didn't want further expatriations, because the life of nomads is like being in mental transit – you go somewhere and then.... Everything becomes a short time investment and.... This is not our nature....*" .

## Experiences and Expectations

Anders explains the reason for his first expatriation: “...*there were blood red numbers at the service department, because there had not been any **Danes** for a very long time*”. ..... “*And everything did succeed, **we** [the department in Japan] turned the negative figures around.....*”. He entered the job with certain expectations about how to manage the department: “*As a **Dane** you are used to saying: ‘well, this is how **we** do it’ from a **Danish** perspective...*”; however, he met with a lot of frustrations “.....***we** [the department in Japan] often disagreed – especially at the beginning.....actually that did continue. Then **we** discussed things for hours and hours until at last when **they** were totally pushed into the corner, **they** said ‘well, this is special for Japan or for **our** culture, so **we** need to do it’; sometimes it was true, but in most cases it was not*”. Here we see how Anders switches between roles as first a Dane affiliated with and governed by the wishes of the headquarters to straighten things up, thus a (superior/inferior) outsider among strangers, and second, as an employee in the Japanese subsidiary pushed by the head office to deliver good figures. Thus, belonging to the group of employees in the Japanese subsidiary generated a contrast to “*the big and evil headquarters*” as Anders continuously and with a smile names the head office. The continuous shifting of identities gave Anders diverse possibilities, but also complications in fulfilling his assignment. Both identity positions were possible and legitimate roles to take on within the given structures and social space he occupied. Yet they were not entirely his to claim. Anders had to work hard to maintain his choice of identity. He learned that his co-workers’ strategy of estranging him, placing him in the role of the inferior outsider and thus hindering reverse knowledge transfer, could only be exhausted by denying the culturally related argument. He refused to accept the identity position as an inferior Dane defined in contrast to the superior Japanese, so he proclaimed: “.....*when **you** say this [that you need*

*to do it the Japanese way] you drive me into the corner, because I do not know your country or what is common practice here..... I do not want to hear that argument used anymore.....We have to restore the company”*. Consequently, Anders used the power inherent in the identity position ascribed to him by the Japanese and the institutional settings of the subsidiary, as ‘the headquarters’ man - a (superior/inferior) outsider, to define all of them as a common “we” group, and as such take on the role of an employee in the Japanese subsidiary. This identity position established unity among the employees as well as specific borders and contrast to other groups, as seen in the description of “*the big evil headquarters*”, a role Anders said he was already familiar with from his previous experiences in Denmark. Anders was the only Dane expatriated at this specific subsidiary and he appreciated it very much, as stated: “...*I was the only Dane, the rest were Japanese... it was fantastic!*” Being the only Dane assisted Anders both in taking on the role as the outsider and in insisting on being a part of the “we” that already existed at the workplace. As such, he managed to situate himself in a productive role to facilitate reverse knowledge transfer.

The Japanese experience did teach Anders how the structure of a concrete sociality generates a limited number of identity positions with fairly defined contours. Furthermore, Anders experienced how he himself, through the use of different roles and distributed power, could fill these contours with content aiming to reach his goals. As such, Anders exploited power structures to handle problematic situations and through identity and earlier experiences of legitimate strategies to handle the demands from headquarters; he changed his *moral career* and learned one way of manoeuvring reverse knowledge transfer in potential cross cultural conflicts.

### **A Narrative of How Resistance and Power Relations must be Understood and Related to Identity Work**

While Anders managed to use the distributed power in Japan, Jens, who went to Malaysia, could not locate any structural precondition for power employment and wasted a lot of time-consuming presence and plenty of patience, which caused a change in his *moral career*. Jens, from Company 5, was a young bachelor from another Danish MNC sent to a subsidiary in Malaysia as an expatriate project manager to “change **their** bad habits”. Jens had experienced a rather strong corporate culture from earlier experiences, for example, the Coca Cola company, and told us that he had learned that: “...[a strong] *corporate culture provides you with unquestionable guidelines [...] Sometimes this could be against your own needs and demands, but then [...]you will just resist or meet your needs without rebelling [...]* In regard to his expatriation, Jens stated: “*I do have a general interest in **other** people and I easily create private relations [...] My working side is rather different*”. His expectations for the expatriation were not met, and he had to change his original frame of reference to reach the goal. Jens was offered the international assignment by his superior. In order to secure reverse knowledge transfer, Jens was travelling back home almost every week at the start. This resulted in a lack of knowledge transfer. He states: “*To begin with, I thought that changing the bad habits would take like three weeks.[...] At the start “ ..... [I] gave **them** hard deadlines and did it the **Danish** way [...] Then **they** organised weekend trips for **me** so **they** could work ... [they] ...wanted to tire **me** out. I could tell this was **their** strategy...*”. He realised that he had little power over the situation: the subsidiary had grown rather indifferent to the strategies of the head office and this resistance generated a productive power that hindered reverse knowledge transfer. The knowledge the subsidiary possessed was the foundation of their power, as Jens explained: “*If I had just pushed very hard...then **they** would just have sent an e-mail to me and my superior to let **us** know that I was released from my responsibilities. [...]. The subsidiary had done that previously [...] I got the worst of it; **they** were going to stay there much longer than I was*”. Resistance is also a matter of how

much and for how long you can resist strategies and plans. In Jens' case it was also a question of presence. Jens was barely tolerated and was treated as an inferior foreigner and not included as a member of the workgroup in the Malaysian subsidiary. His continuous travelling back and forth between the headquarters and subsidiary underlined this position. The power distributed to Jens from the head office was only counterproductive within this context. The only available identity position was as an annoying, bossy and inferior foreigner. He did not have a breakthrough until he relocated himself to the location and utilised his relational common sense and showed interest in “..**their** way of working and trying to understand both **their** market and how **they** worked within it....”; then “I finally change the habits [...] but it took me one year [...] **Someone** should have informed me about that beforehand...”.

From his earlier experience in strong corporate culture, Jens had learned that: “...you need to sound out the people you are dealing with. It is a question of common sense and ordinary politeness. ....about how you react to other people...”. Yet he did not employ this knowledge in the new experience until he almost failed. Jens' struggle to create a different legitimate identity position within the subsidiary met with very hard resistance. Only by cautiously changing his *moral career* and patiently listening to the employees' conditions and experiences of how knowledge and power in the subsidiary were deeply entangled, did he manage to open a small room for other available identity positions. At the start, Jens used frames of references and understanding from his current identity positions within the MNC to handle the gap in comprehension. No learning and not even a one-way knowledge transfer unfolded from that perspective. It was a typical clash between the headquarters' expectations and the local subsidiary's independence and management of knowledge resources. Reversed knowledge transfer did not occur until Jens changed his *moral career* and accepted that the

resistance towards the distant head office actually established a new power relation and guidelines for acting within the structural framework.

### **Generating Transformative Learning and Reverse Knowledge Transfer**

Available roles of identities are always established within a social context and situated as socially meaningful and relevant in the concrete situation. Although there is always a range of possible and legitimate identity positions, the specific choice in a specific situation is a combination of structural possibilities and power relations, as well as the concrete individual agency's personal experience of possible, essential and necessary agency. In Anders' case, we can detect how he used the power relations inherent in the structural setting to apply previous experiences of employees' belongingness into an unfamiliar setting that already enabled and constrained certain identity positions. Jens, on the other hand had trouble understanding and using the concrete power relations to his benefit. The two cases illustrate the general study by reflecting that the intrinsic multiplicity of power relations and resistance and distance must be seen and treated as a real and important power position that can both hinder or spur reverse knowledge transfer as well as expatriates' possible transformative learning situations. The clash between headquarters' expectations and Jens's experiences show that concrete reformulation of the relation between agency and structure is correlated to the development of the individual's *moral career*.

Yet both transformative learning and reverse knowledge transfer become rather limited when the distinction between 'us' and 'them' is maintained through socio-historical spaces. Below, I will follow Anders' description of his second expatriation to show how new experiences of transformative learning can be hindered by institutionally generated organisational structures and work organising practices.

## Uneasy Transfer of Experiences and the Lack of Change in Moral Career

Anders' Japanese experience is, throughout the narrative, contrasted to his next expatriation, a R&D hub in Singapore. This was only just set up at the time of Anders' expatriation and played a central role in the MNC's strategy to gain a market share in Asia.

The R&D department had until then only been located in Denmark and many of the employees at a managerial and high technical level were transferred to Singapore to build up the hub. Anders explains: *"A lot of **Danes** left for Singapore – too many if you ask me... [it was a] failure to send out a lot of **Danes**. We were about 10-12 people [...] None of the clever Indians or the clever Australians or Chinese. You did not get the buy-in from the region and from the ones who knew what was going on in Australia, India and China. You just moved a **Danish** office to Singapore [...] the same people and the same teams and a few newcomers - you did not obtain any knowledge from the local headquarters about what actually happened there"*. Anders continues to discuss the impact sending out a lot of Danes had within the subsidiary and to the Danish head office. *"...I think that you can get far better cooperation the other way around, and then reduce **us Danes**. It just becomes "die dumme **Dänen**" who came out and still thought they knew [...] And most of **them** who were expatriated to Singapore had never tried it before..."* Even though Anders defines himself as one of the Danes and one of the expatriates, he still manages to portray himself as different and apart from the expatriated group of Danes. He accomplishes this through distinguishing between the fact that he **is** an expatriated Dane and how he, unlike most of the others, performs/**does** the expatriated Dane. Accordingly, he argues that the role of the expatriated Dane can be filled with divergent content depending on different levels of understanding and knowledge as well as the level of openness to new situations. This is further underlined in the subsequent statement: *"**We Danes** are incredibly proud. We think that **we** know how to do things right [...] It is actually a sign of an enormous ego, which **the Danes** perform when*

*they go out and they think: well, it is really us who have understood how to move from A to Z even though there are a million other ways to do it*". Anders describes a belongingness to the "us" being a Dane, while at the same time alienates himself by depicting a border between being a typical Dane with an arrogant attitude and the Dane he himself represents. This Dane is open to learn from the "millions of other ways to move from A to Z". Consequently, within the same group – Danes - he creates different contexts and as a result separates himself from the role to which he structurally belongs. This enables him to fulfil the expectations within the structure and still display agency to align his *moral career* within other social spaces and relationships he feels he belongs to (i.e. the open-minded expatriate with the Japanese experience). Yet he is not capable of transforming the structural us/them division and the stereotypical veils of reverse knowledge transfer and transformative learning.

When asked whether he had received any training preparing him to handle and learn from the unfamiliar experiences he encountered in Japan and Singapore, Anders replied: "Well, I do not remember if I had any.... [Whether your success] is largely dependent on how you are as a person, while you are abroad. It is not **everyone**, which [...] I think **we** expatriate too many from Company 2 who were totally unqualified – at least in Asia [...]. **They** should never have left. It might be that **they** are the best in **their** job, but as persons **they** are totally 'no go'. Leave **them** in Denmark seated somewhere [...] not out there".

Accordingly, Anders distinguishes between qualified workers and qualified expatriates, indicating that the qualified expatriate is a question of who you are, not a tool to be learned, even though some of the cross-cultural literature indicates that expatriate reflectivity, empathy and adequate behaviour can be learned (Thomas et al. 2008). Anders' standpoint is closely connected with his *experiences* of belongingness and image of his self (Goffman 1961:119). Anders became expatriated with a lot of Danes in the newly founded hub in Singapore. At the outset he identified himself as an expatriated Dane in contrast to the Singaporeans, who he –

along with many of the other expatriated workers - categorised and judged with stereotypes such as lazy and untrustworthy. This maintains the social role expectation of an us/them division between the skilled Danes sent out by the head office and the local unskilled employees. While Anders in his previous experience in Japan did replace the structural position as the headquarters' man to one of an employee within the subsidiary, the replacement could not be effected in Singapore due to already established structures maintained by the amount of expatriated workers located in the same place. There was no social legitimacy in establishing belongingness to the Singaporeans or other regional managers while a large number of the expatriated Danes were placed in the management team with Anders and located in the same compound. Thus, most of Anders' legitimate social spaces were occupied with more or less the same structures for identities, expectations and belongingness.

In Anders' case, the number of expatriates stimulated the distinction between them and us and fortified stereotypes as a tool with which to handle moral experiences and gaps in comprehension. A large amount of Danish expatriates automatically generated closed communities and reinforced power structures and the stability of *moral career*. Consequently it left little room for changing *moral career* and engaging in transformative learning. In consequence, reverse knowledge transfer did not occur. These tendencies are replicated throughout all the interviews with expatriates and show that the number of expatriates populating a subsidiary, a newly established hub or a recent acquisition, plays a significant role in the expatriates' *moral career* and transformative learning opportunity. The structural frames of organisational power and identities inherent in this set-up show a tendency to hinder reverse knowledge transfer.

The present study indicates that institutionally generated organisational frames and work organising practices develop and feed certain power structures and communities,

which influence the possibility of agency and following reverse knowledge. The narratives indicate that: 1) power is as an important productive force in identity work. Consequently, it has the ability to both hinder and spur the processes of transformative learning and reversed knowledge transfer. 2) Reverse knowledge transfer can be hindered by the lack of transformative learning in single individuals. The narratives illustrate how the path of agency is woven together with certain pertinent structural elements. Hence, the expatriates' sociality cannot be understood as a well-defined and inescapable mechanic entity. Instead, it should be regarded as knotted together by a variety of power relations in a changeable and organic sociality (Maffesoli, 2003), in which agency and moral careers may further change through transformative learning and identity work.

## **CONCLUDING REMARKS**

### **Contributions and implications**

This study makes methodological, empirical and theoretical contributions. The narratives of Jens and Anders exemplify how identity work plays an important role in regard to transformative learning and in consequence on reverse knowledge transfer within border-crossing situations.

In this study, I have exclusively focused on the single expatriate's transformative learning experiences as a methodological strategy. The paper makes a methodological contribution through its use of LCP and the concept of *moral career* to capture the relationship between transformative learning and identity work. First, it offers fine-grained accounts on how the lives of actual individuals are linked with institutions and societal levels. Second, it provides an opportunity for studying how identity work is an interrelated process between the individual and his/her social context. Third, it produces an insight into individuals' transformative learning processes. To sum up: the LCP narratives

provide material with which to understand the processes in which the narratives are created and which can endorse knowledge about how experiences colour expectations and vice versa, and consequently bear witness to how identity work is involved in the process of transformative learning and reverse knowledge transfer.

From the empirical study, two findings can be drawn: 1) that distributed power can provide a spur for new identities that facilitate change in *moral careers* and thus, transformative learning; 2) that resistance represents a very effective power relation that must be acknowledged to assist transformative learning. From a practical position these findings stress that it is not only a question of the single individual's capacities or willingness that endorse reverse knowledge transfer: agency is strictly intertwined with power relations and institutional structure. This has important implications for training and for the selection of future expatriates and candidates for international assignments.

These findings enable us to draw the following theoretical conclusions: first, how structures in the power relations in institutions and organisations are part of defining legitimate and possible identities and social roles. Second, how power relations can assist and/or hinder the agency as a productive force in transformative learning processes. Third, that transformative learning generates options for reverse knowledge transfer.

As stated (Oddou, Osland and Blakeney 2009), the relation between expatriates and the work unit plays an important role in reverse knowledge transfer. This study argues that this relation is formed through the trajectories of structure and agency to which identity work, investigated through the expatriate's *moral career*, plays a significant role in transformative learning processes. Consequently, the productive initiative to measure reverse knowledge transfer through expatriates must not only consider the abilities and willingness of the individuals and the organisations to learn and transfer knowledge separately. Instead, we must extend the repertoire of theories within the research of reverse knowledge transfer and

study and understand the trajectories and power relations in their entangled relationship to grasp the dynamic field of reverse knowledge transfer. As such, the paper shows that the research of reverse knowledge transfer in International Business Studies will benefit from both LCP methodologies and a theoretical expansion into research of identity and learning.

### **Limitations and suggestions for further studies**

Having said this, there are of course limits to this study. First of all, the data material comprises a rather small cohort and it is important to examine whether or not the same theoretical saturations emerge from a larger study. A relevant study would be with current expatriates within the same MNCs at their present locations around the world. Second, while interviews provide an insight into the informants' own perceptions and show how they narrate their own lives and experiences, observation of expatriates in specific reverse knowledge transfer processes would provide the research with further information on the role of identity work within MNCs with distributed power relations and how resistance evolves and is used in knowledge management.

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