

EXPATRIATION, CAREERS AND RESOURCE BASED VIEW: A Critical Study Based on Power

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ABSTRACT

This study presents eight interviews with executives of the same French company. We interviewed four Brazilian executives expatriated in France (from a subsidiary to headquarters) and four French executives expatriated in Brazil (from headquarters to a subsidiary). We considered in our study that the first situation, in which executives go from the outskirts to the center of power, is not comparable to the second, in which executives go from the center to the outskirts of power. We formulated some hypotheses for each concrete case, which could be confirmed according to the facts raised in the statements. In our study, we criticize some arguments that support learning organizations and strategic personnel management. We discuss that these frameworks do not sufficiently consider the issues of power involved in organizational change and innovation processes. We show that the discourse on learning organizations does not include the power variable – it is a powerless discourse. Our study on expatriation show that expatriated executive's capacity for strategic action (that is, individuals' capacity to rebuild their strategic alliances and join the new power games and politics that are part of organizational change and innovation) is a variable that must be considered in this kind of study.

Keywords: learning organizations, strategic personnel management, innovation processes, expatriation

1 INTRODUCTION

In the study of strategic human resources management, or competence management, some scholars defend the following reasoning, based on the resource-based view (RBV) and dynamic capabilities theories:

- The firm will have a competitive advantage as long as its resources are valuable, rare, and difficult to imitate, which is the so-called VRIO (Value, Rarity, Imitability, Organization) model.
- The firm's assets represent some financial, organizational, market, and other capabilities, which ensure its competitive advantage.
- Each firm has a set of core competencies, around which it organizes itself.

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- The essential competencies that ensure the firm's success today are not the same ones that will ensure its future success.

- In order to develop a sustainable competitive advantage, a firm must continuously develop new products or rearrange the existing assets, to ensure they remain valuable, rare, and difficult to imitate. Therefore, it is essential for the firm to innovate continuously.

- To innovate, a firm will need an organizational group that knows how to update its competencies continuously and is capable of employing double-loop learning. To innovate, a firm must organize itself according to the principles of learning organizations, dedramatizing change, which is a natural innovation process.

- Strategic human resources management must train and develop individuals to ensure they can develop their competencies and grow together with the firm.

- Competencies are defined as a set of knowledge (set of technical contents), skills (know-how), and attitudes (the psychological tendency to act in a certain way).

- According to this argument, a firm that hires individuals with a good set of knowledge and skills, an attitude that favors change and teamwork, and a willingness to learn, will innovate continuously and develop a sustainable economic advantage with more ease.

This set of arguments is well defined from the theoretical perspective in various publications we have studied. Nonetheless, this model is also subject to some criticism:

- The arguments that support learning organizations and strategic personnel management do not sufficiently consider the issues of power involved in organizational change and innovation processes. That is, the discourse on learning organizations does not include the power variable – it is a powerless discourse.

- Capacity for strategic action (that is, individuals' capacity to rebuild their strategic alliances and join the new power games and politics that are part of organizational change and innovation) is a variable that must be included in this analysis.

- To this effect, expatriation could be viewed as a form of training, in which the individual is tested for his or her skill in strategic action, because this individual leaves the country of origin to join the destination organization, establishing new strategic alliances and forms of relationship, and successfully carrying out his or her mission.

- This study presents eight interviews with executives of the same company. Four were Brazilian expatriates in France (from a subsidiary to headquarters) and four were French expatriates in Brazil (from headquarters to a subsidiary). We consider that the first situation, in which executives go from the outskirts to the center of power, is not comparable to the second, in which executives go from the center to the outskirts of power.

We formulated four hypotheses for each concrete case, which would be confirmed or not by the interviews, according to the facts raised in the statements.

1.1 HYPOTHESES REGARDING EXECUTIVES GOING FROM HEADQUARTERS TO THE OUTSKIRTS OF POWER (A SUBSIDIARY)

H1a: An executive transferred from headquarters to a subsidiary to hold a top management position has already demonstrated strategic-action skill in his country of origin, building high-level strategic alliances at headquarters.

H1b: These strategic alliances have enabled this executive to secure a command position at the subsidiary.

H1c: An expatriate going from headquarters to a subsidiary can more easily join the local power games at the subsidiary.

H1d: Staff at the subsidiary are eager to collaborate with the expatriate to “rub shoulders” with the headquarters' central power, represented by this executive.

1.2 HYPOTHESES REGARDING EXECUTIVES GOING FROM THE OUTSKIRTS OF POWER (A SUBSIDIARY) TO HEADQUARTERS

H2a: An expatriate going from the outskirts of power to headquarters faces more difficulties in joining the headquarters' power games.

H2b: An expatriate going from the outskirts of power to headquarters who successfully manages to conclude the expatriation process probably built strategic alliances at headquarters and will join the local power games.

If H2b is confirmed, it becomes clear that the expatriation process enables individuals going from the outskirts to the center of power to develop a capacity for strategic action. This allows organizations to select executives who have proven negotiation and adaptation skills in the face of change, in addition to knowledge and skill.

The type of individual who knows how to join the new power games and successfully negotiate new positions that come with change is essential for the organization's innovation process.

Crozier and Friedberg say that every organizational change implies rupture and the creation of a new system of rules and power games. Those authors define what they call the pertinent uncertainty zone: A set of information, knowledge, and skills necessary to manufacture a product or render a service that earns money for the organization. Groups that control the technical competencies necessary for producing the organization's main products or services will have more power.

When the organization innovates, developing new products or services, the pertinent uncertainty zone shifts. That is, the knowledge and skills necessary for the organization to earn money also change. The older group "loses power" because the new products and services require political rearrangement and new strategic alliances. If an individual wishes to stay in the company and remain in a dominant group, he or she must learn techniques that are relevant to the organization, refreshing his or her knowledge. Moreover, this individual must also know how to join the new political framework.

All of this is the result of the individual's capacity for strategic action.

The expatriation of an executive from the outskirts to the center of power fits this case, and it can be useful to select individuals who prove to have this capacity for strategic action.

2 THE RESOURCE-BASED VIEW AND THE DYNAMIC CAPABILITIES THEORIES

Different approaches attempt to explain how companies achieve competitive advantage. By competitive advantage, we mean achieving results consistently above those of the competition. Below we highlight two of these approaches:

- One believes that a competitive advantage is an attribute external to the organization, associated with the market structure and the nature of competition in different industries. Among the main supporters of this line of thinking, we have Porter (1991) and his competitive strategy model, which is based on forces that drive competition in a given industry.
 - The other associates competitive advantage with internal attributes that set the company apart. This line of thinking has two main theories, the resource-based view and dynamic capabilities. Both believe that competitive advantage lies beyond market forces and is associated with the firm's capacity to develop internal resources that are hard to imitate.
- We will briefly analyze the main elements of these two theories and then study the object of our conceptual basis, dynamic capabilities.

2.1 THE RESOURCE BASED VIEW THEORY

The resource-based view theory is based on the understanding that the source of competitive advantage lies in resources (physical and financial, as well as intangible and invisible) and in the competencies developed by the firm; market factors have only secondary importance (Barney, 1991).

Analyzing this line of thinking, Teece (2000) points out that according to RBV, a firm's achievements are not only a function of the opportunities it finds, but also – and mainly – a function of what this firm controls and develops internally.

Penrose (1959) argues that organizations should be seen as administrative structures that combine and coordinate individual and group activities, and as a set of productive resources, which can be divided into physical and human resources.

If we see a contemporary organization as a combination of resources, the RBV embraces the notion of organization suggested by Penrose (1959), one of the first to view firms as a set of resources, rather than as an abstract function such as the transformation of raw materials into products.

Following this reasoning, Barney (1991) points out that an organization's current competitive advantage can exhaust itself if others can copy it, unless the organization develops a sustainable competitive advantage with features that competitors find hard to imitate. To achieve a sustainable competitive advantage, Barney (1991) argues there are four categories of essential resources: Financial, physical, human, and organizational capital. These resources must follow four criteria:

- The criterion of value – managers must check if the organization's resources add value by their capacity to exploit opportunities and neutralize threats.
- The criterion of rarity – a relevant fact is whether companies have the valuable resource or not.
- The criterion of imitability – we must consider if the companies not having a given resource will incur a cost disadvantage in securing this resource to match companies that already have it.
- The criterion of organization – an important aspect is to assess whether the company is organized to fully exploit the competitive advantage of its resources.

The work carried out by scholars supporting the RBV merges with that of Prahalad and Hamel (1990) inasmuch as the latter state that an organization's competitiveness should be based on the development of core competencies. These competencies should follow the criteria of difficult imitability, providing actual benefits to customers, providing access to different markets, and fostering an environment of fast learning that must be put to work before the competitors do it.

According to these authors, the most powerful way to face competition is associated with the ability to identify, nurture, and exploit core competencies that enable growth (Prahalad and Hamel, 1990). In their opinion, it amounts to securing a portfolio of core competencies, rather than a portfolio of businesses.

According to Prahalad and Hamel (2000), core competencies result from collective learning, especially in relation to integrating multiple chains of technology, organizing work, and delivering value to the customer. Here we find a fundamental point of RBV: Customers must clearly see these core competencies as unique. In these authors' opinion, the actual sources of competitive advantage are found in the ability to consolidate technologies and the production capacity in competencies that allow fast adaptation to changes and/or new opportunities.

Yet Foss (in VASCONCELOS and CYRINO, 2000) believes RBV has its limitations:

- The emphasis on the notion of equilibrium, which is threatened by the current scenario of grave uncertainties, ambiguity, and complexity;
- The emphasis on distinct resources, when in fact what we see within a firm is a relative arrangement among various resources;
- The secondary role attributed to the environment, which could be a limiting factor in the face of the predominant role held by environmental conditions.

In addition, the RBV perspective clearly focuses on strategies to exploit the firm's existing assets. Yet, as argued by Teece (2000), before a firm can enjoy a competitive advantage it must develop new capabilities. According to Teece, if control of scarce resources is the source of competitive advantage, the development of new capabilities, management of intangible assets, and learning become essential issues. This perception led to the development of a new approach to dealing with competitive advantage, the dynamic capabilities theory.

2.2 THE DYNAMIC CAPABILITIES THEORY

RBV evolved and become the notion called dynamic capabilities. Teece (2000) points out that the winners in the global market today are those that have a capacity to act fast, flexibility in product

innovation, and management capacity to effectively coordinate and unfold internal and external competencies. Teece believes that firms are not a reproduction of the market, but rather domains where activities are organized differently from the market. The capability to achieve new forms of competitive advantage represents what Teece calls a “dynamic capacity,” meaning the organizational capacity to integrate, build, and reshape internal and external competencies to deal with a fast-changing environment. In other words, this notion refers to the organization’s capacity to renovate itself and adapt its core competencies as time flows. The theory of dynamic capabilities provides an answer to the issue of competitiveness in environments of high complexity and change, which says that a firm is set apart by its capacity to accumulate and combine new resources in new arrangements, rather than by its current stock of resources. This capacity depends on the organization’s learning capacity.

Dynamic capabilities help us understand that organizations cannot rely solely on the accumulation of rare and difficult-to-imitate resources, therefore securing competitive advantage. Organizations must have a response capacity in time, which produces fast innovation, associated with a management capacity to coordinate and relocate internal and external competencies in an effective manner. According to Teece (2000), the term “capacity” is associated with the management role of adapting, integrating, and reshaping the internal and external organizational capabilities, resources, and competencies within an environment of change.

Teece (2000) believes that various factors can determine a firm’s distinct competencies and dynamic capabilities, which he places in three categories: Processes, positions, and paths.

- Processes: This refers to the manner in which things are carried out, the routines, or the standards of practice and learning.
- Positions: This refers to the control of technology and intellectual property of the firm, its supplementary assets, its customer base, supplier relations, and external relations in general. It deals with knowledge and assets that are hard to be copied, as well as the firm’s reputation and relations.
- Paths: These are the available strategic alternatives. According to Teece (2000), the path a firm can take is a function of its current position and future alternatives. The current position is often determined by the path chosen in the past. Therefore, under this theory, past decisions matter and determine future alternatives.

Under the dynamic capability theory, competitive advantage is tied to high-performance routines operated within the firm and reflected in processes and positions. They are combined with past decisions and paths, which in turn associate with technological dependencies and outline the future path.

We find in Mintzberg, Ahlstrand, & Lampel (2000) a point of convergence with this view, in their discussion of the learning school in defining strategies. According to these authors – based on the ideas of C. K. Prahalad & Gary Hamel (1990) – for this school, the definition of strategy at the firm starts with a collective learning process, intended to develop and exploit competencies that are hard to imitate. When they interact in the organization, people get in conflict and seek consensus and a way for mutual agreement, which leads to the learning process.

3 THE DYNAMIC CAPABILITIES THEORY AND THE LEARNING PROCESS

3.1 COLLECTIVE LEARNING

Crozier (1994) discusses a new logic that permeates organizations: The capacity to innovate and transform becomes more decisive than the capacity to rationalize that predominated in previous models. The logic of “mass consumption – production” gives way to the logic of “high technology – services,” in which the quality of the services makes the difference. This quality does not depend solely on technological innovations, but mainly on the capacity to mobilize various partners of the organization.

Crozier & Friedberg (1981) based their ideas on what they call a “new” concept of collective action, according to which the capacity to change – which is at the core of the learning process – takes place according to people’s capacity to effectively cooperate and generate transformation. According to Crozier (1981), change in organizations is a sociological issue because it is the people that change. This does not take place passively, but rather within a group, and not individually, but collectively. Crozier (1994) believes that the creation of the future and the development of organizations is most of all based on the transformation of people comprising the organizations, which happens through these people’s learning. He sees this learning not only as a process happening through the formal methods, but also one of trial and error.

Crozier (1994) feels that learning implies a change not only in the rules of the game, but also in the nature of the game within the social fabric that shapes the organizations. This social fabric consists of organized relations, interactions, and exchanges, in which learning takes place collectively and in the relations’ day-to-day routine.

In the opinion of Crozier (1994) the faster pace of change in the post-industrial era jeopardizes companies’ stability, which adds to their fundamental objectives the capacity to transform and innovate, based on this collective learning. This view is aligned with the concept included in the dynamic capabilities theory, which, as pointed out by Bowman and Ambrosini (2003), is focused on the firm’s capability to continually renewing its assets.

As emphasized by the dynamic capability theory (TEECE, 2000), in order for the above process to take place, and to ensure renovation builds a sustainable competitive advantage, the critical factors are associated with the firm’s capability to own, unfold, and constantly renew distinct competencies. As pointed out by Crozier (1994), this capability is associated with people’s learning capacity. By learning individually and collectively, the individuals change themselves; by changing, they change the organization, in a cycle where the organizational group acts on the individual and vice-versa, in a process of continuous change and restructuring of new concrete action systems. Personnel management takes up a fundamental role as the basis for this innovation process.

However, Crozier & Friedberg (1981) acknowledge that change – the basis of innovation – is not a natural process. Indeed, it represents a challenge for organizations, precisely because of its collective nature. For those authors, learning can only be grasped as a process of collective creation, in which members of a given group – by trial and error – invent and establish new forms of playing the social game of cooperation and conflict. Consequently, this cannot be an individual learning process, which makes it much more difficult. Each of the participants in this “game” can quickly learn new forms of the game, but the hurdle is the learning process of most organizational players, which in fact is essential for the innovation process that drives organizational growth, as espoused by the dynamic capabilities theory. The learning of all players implies the acquisition of new relational models.

According to this view, in order for the innovation process to generate a sustainable competitive advantage, it is not enough to have the capability to enhance technical competencies that enable the reinvention and renovation of products and services. It is essential to have the capacity to enhance and reinvent the rules of the collective game, based on affective, cognitive, and relational components, as pointed out by Crozier & Friedberg (1981).

3.2 LEARNING AND INNOVATION

Reinventing the rules of the collective game as the basis of organizational learning goes beyond a simple change in behavior. It implies a deeper questioning of the existing cognitive and technical patterns, a critical analysis of organizational proceedings, which allows the creation of a new set of references.

We can associate this learning capacity to that defined by Argyris (1997) as double-loop learning.

Argyris believes that learning takes place when errors are detected and rectified, or when the intention and the consequences of actions coincide. In his opinion, errors are corrected in two ways: One is based on the simple change of behavior (single-loop learning); the other is based

on the change in what he calls the “master program” that individuals use to trigger their actions (double-loop learning). According to Argyris (2000), these “master programs” can be understood as theories of concrete action that inform the social actors of the strategies they should use to achieve their intentions.

Argyris (2000) points out that concrete-action theories are based on a set of values that outline the framework of actions. He identifies two theories of concrete action: One in which the individual espouses his or her beliefs, values, and attitudes, and one in which the individual really employs them – the theory in use. The double-loop learning process is associated with changes in these patterns, beliefs, and presumptions, not only in the behaviors.

From the point of view of the individual, this process of change is more easily achieved, as Motta & Vasconcelos (2002) point out, when the process involves values and patterns developed in secondary socialization (developed from the relations of individuals with the society), which individuals identify with to a lesser degree than those developed in primary socialization (which takes place in early childhood), which pre-structure perception and are a part of each individual’s personality.

From the point of view of the organization, double-loop learning involves accessing information that allows a comparison of what is available in the market, competitiveness, competing business models, and existing organizational structures, and then questioning this structure and suggesting corrective measures, to include, if applicable, changing the former structure, enhancing competencies, and developing a new business model. According to Argyris (1997), this means rectifying errors by first changing underlying values and then changing the individual’s actions, which requires a rupture. Consequently, within the organization the double-loop learning process requires a change that dismantles a given concrete action system to build another – that is when the rupture takes place.

According to Argyris (2000), the learning process does not take place when individuals accept the existing games and omit organizational errors, which in Argyris’ opinion is what most commonly happens in organizations. Argyris (2000) shares the vision suggested by Crozier and Friedberg (1981) on the inherent difficulty of change processes. A deeper challenge of patterns can lead to conflicts, which are normally avoided by the organizational games themselves. Argyris (2000) even comments on the existence of some games that perform the role of hiding other games, thus hindering deeper questioning that would lead to double-loop learning.

To summarize, by establishing a relation between the positions defended by Argyris (2000) and Crozier & Friedberg (1981), we reach the following conclusion: Individuals live in organizations under concrete-action systems, in which we find some techniques and technologies (deemed the best in the system) and some types of management and social practices (forms of work, behavior, strategic alliances, etc.). Organizations are social and technical systems containing a given technique (technologies) around which individuals perform social roles and have some types of conduct. Consequently, an organization can house individualistic work forms, in which people are bound to rules and standards, and work around specific technologies.

When technologies change (as when new products and services are introduced), many times the organization’s management forms also change. Something previously deemed positive is now considered inadequate, obsolete, and so on. The organization can implement new software and forms of service, and to do so it must implement new forms of management, and require that individuals exhibit new forms of behavior (teamwork, independence, etc.). Individuals who were accustomed to the previous behavior patterns that “worked out” may at times face difficulties adapting to new relational forms and adopting the new behaviors required by the new organizational system (the new “concrete action system”).

Therefore, as pointed out by Crozier & Friedberg (1981), in dealing with innovation, learning is not only technical but also relational. One must learn new forms of social interaction, adopt new forms of behavior, and embrace new strategic alliances. An individual who previously worked well in an independent manner may have difficulties adapting to a new teamwork model. The establishment of a new concrete action system follows the innovation process.

As we have seen above, according to Argyris, innovation in organizations is the act of institutionalizing double-loop learning. That is, in addition to promoting continuous improvement of processes (work, manufacturing or services), double-loop learning implies continuous assessment of

the assumptions behind the work process (whether the technology employed still makes sense in the market in light of current competition; whether the concept of the product or service still matches the market's requirements or needs a radical redesign; whether personnel management and organizational procedures are still up to date or must be fully redesigned, etc.).

According to Argyris, innovation requires continuous rethinking of organizational values, concepts, and procedures, not merely the improvement of existing ones, which is in line with the dynamic capabilities theory. Consequently, innovation necessarily implies rupture – breaking up old patterns and concepts of products and services, older forms of technology, and former organizational procedures and management forms.

Rupture requires the organizational group to continually reinvent and redesign itself. However, when new technologies and management forms are implemented, we also have a rupture with previous know-how and technical and relational competencies, as well as the former power structure.

Individuals must learn new techniques and new forms of behavior, and develop new strategic alliances. For example, in a bureaucratic company in which an individual survived by having only a strategic alliance with his superior and worked individually, a new participative management system was implemented, under which this individual – despite being a competent professional – encountered difficulties establishing strategic relations with members of a work team.

Since the building of a new technical and relational system – a characteristic of innovation – breaks up previous relational and cognitive models, in addition to previous power structures, as mentioned by Crozier & Friedberg (1981), change does not come naturally. What makes it difficult is that the new concrete action system breaks up previous power structures and the “comfort zones” of the individuals. This change produces resistance and individuals fear giving up the power and influence they enjoyed in the previous system, not managing to establish new strategic alliances that allow them to survive in the new system. Change is difficult and implies rupture. Yet, as pointed out by these authors, change must be based on previous competencies and practices, because even if the change involves massive layoffs, a large share of the previous competencies will remain.

The capacity to learn and adapt to new strategic contexts becomes essential for the individual and the organizational group to innovate, and to deploy this innovation.

Regarding the dynamic capabilities theory, we conclude that for a firm to enjoy a sustainable competitive advantage, it is essential for the organizational group to have the ability to innovate, continuously rethinking the basic assumptions of products and services (double-loop learning). For the firm to continually implement innovations, the organizational group will need not only the capacity to relearn its skills, but also to deal with ruptures, developing new relational forms and new strategic alliances. Thus, the organizational group's capacity for strategic action is essential for the continuous innovation process.

3.3 LEARNING, INNOVATION AND STRATEGIC ACTION

The strategic action of an organizational group is closely related to the rules governing the power games in the organization; the power games are the center of the alliances in this strategy. According to Crozier & Friedberg (1981), these power relations are developed in the light of structures and rules that govern the operation of an organization, and that determine what these authors call the “organizational uncertainty zones.” This concept is based on the authors' belief that uncertainty in general, or specific uncertainties, are the essential source of all negotiations: Social actors use to their advantage everything within a zone that they alone control. We can understand that an uncertainty zone is an important element for the social actor, but it does not depend on this player alone. Whoever controls an uncertainty zone has the power, and whoever is submitted to this uncertainty zone is placed in a situation of dependency.

Individuals control these uncertainty zones in the search for their strategies. The zones can be associated with the exclusive control of different types of resources, as pointed out by Crozier & Friedberg (1981):

- The control of specific competencies;
- The control of relations with critical social partners;
- The control of information and communication processes;
- The control of fundamental organizational rules.

To control an uncertainty zone, of whatever nature, is essential in the organization's power game. Consequently, we can deduce that the nature of organizational players is to try to perpetuate their uncertainty zones, as a way to sway games to their side, and to benefit their strategies. This conclusion confirms the difficulty of change discussed above, and can limit the capacity for learning and innovation. As stated by Crozier & Friedberg (1981), the difficulty of change is intimately associated with the fact that social actors are "prisoners" of the action systems they control, which ensures their control of some uncertainty zones.

Innovation requires finding new resources: New unique competencies, new sources of critical information, new organizational rules, and new relations. It means learning a new organizational game in which these sources are a factor of uniqueness; control of the sources represents competitive advantage. Innovation implies the rupture of former relational circles to establish new relational circles, in a new dynamic of power.

To summarize: Rebuilding these relational circles requires social actors to reorganize their alliances, to build new uncertainty zones, and, within the organizations, to learn new competencies.

3.4 LEARNING AND COMPETENCIES

We have different approaches for the concept of competencies and for the process that generates their learning. According to Dutra et al (2000), we have an American line of definition, which believes competence is a set of skills – meaning knowledge, skills, and attitudes – that enable an individual to achieve superior performance. Authors such as McClelland & Dailey (1972), Boyatzis (1982), and Spencer & Spencer (1993) defend this line of thinking. According to them, competencies can be planned or structured to enable some kind of evaluation, and are essentially developed through training processes. By training, we mean the form of acquisition of superior performance patterns that, according to Moura & Bitencourt (2006), takes place through the intersection of three elements:

- Know: Incorporate knowledge;
- Know how to do: Acquire skills;
- Know how to act: Develop attitudes.

To counter this American point of view, we have European authors LeBortef (1997) & Zarifian (2001), who believe that competence is in fact the practical expression of a set of knowledge, skills, and attitudes. It is an individual's capacity to deploy his or her resources in a practical response to the situations this individual faces.

Zarifian clarifies that competence is "practical intelligence," based on previously acquired knowledge, which is transformed according to the more complex demands an individual faces in new situations. A set of knowledge, as well as pre-existing skills and attitudes, based on previous experiences represents the foundations for the individual to seek new answers when facing unknown situations. LeBortef confirms this line of thinking, stating that competence is the capacity for putting existing knowledge into practice in new circumstances. Concluding the reasoning of the European authors, it only makes sense to talk about competence in action, associated with know how to be and know how to use knowledge in different contexts (Dutra, 2000).

The learning of new competencies, a fundamental skill in dynamic capabilities as a new paradigm of competitiveness, therefore implies, according to what we have seen above, applying knowledge, skills, and attitudes in a new context, different from the previous contexts of control, more complex and less foreseeable. This is the basis for the development of the capacity for strategic action as defended by Crozier & Friedberg.

4 EXPATRIATION IN THE NEW COMPETITIVE ENVIRONMENT

4.1 DRIVERS OF THE EXPATRIATION PROCESS

Considering the information presented above, and according to the dynamic capabilities theory, we conclude that for a firm to enjoy a sustainable competitive advantage, it is essential for the organizational group to have the ability to innovate, continuously rethinking the basic assumptions of products and services. This must take place in an environment of the post-industrial and globalization model, according to Stiglitz (2002). In this environment, growth is driven by highly mobile capital and liberalized trade. According to Tallman & Faldmoe-Lindquist (2002), the clearest characteristic of the globalization phenomenon is the strategic effort to consider the world, or at least a large share of it, as a single market to do business. Cole (2003) and Stiglitz (2002) believe that in addition to these dimensions, globalization is also a process of social interaction, in which individuals – even unconsciously – join a network of global relationships of all sorts, based on sophisticated communication models. Integration of the markets and greater international trade demands from individuals greater social mobility and the ability to successfully live with other cultures and work in different social contexts.

From the management perspective, to face the challenges of globalized management, we see a rising demand for what has been called the “global executive,” who can understand and secure competitive advantages in this new context (FREITAS, 1999).

As suggested by Suutari (2002) and Caligiuri & Di Santo (2001), these executives will inevitably work in environments unknown to them, having business standards shaped by local culture (many times far away from their culture of origin), by political practices, and even by religious practices, in some cases.

Studies by Suutari (2002) and Caligiuri & Di Santo (2002) show that the challenge faced by executives in this often-adverse environment is to secure superior results and productivity. The authors also point out that these executives must know and show respect for the most significant cultural aspects of other countries, and know how to deal with these aspects on a day-to-day basis, to facilitate results, which implies managing cultural diversity.

Harris & Moran (1993) also discuss this topic and use the term “global executive” to define all those who must deal with people and cultures and whose development necessarily requires intercultural learning. For these authors, organizations must be viewed as “cultural entities,” which have been undergoing a great transformation in the present environment, demanding a more global perspective.

Companies that operate in this global context have been facing the challenge of identifying the individuals who adapt best to this global dimension, and developing this profile in their executives.

This development process has involved many different strategies, which aim for different objectives and lead to different levels of exposure to the globalized environment. One of the most effective is the strategy of sending executives on long-term missions outside their country of origin, in the expatriation process.

Following this reasoning, Bartlett & Ghoshal (1992) argue that companies have three complementary objectives in their expatriation process:

1. Improve local response: by improving in this process the knowledge of markets, products, customers, etc.;
2. Integrate globally: securing competitive advantage by exploiting local uniqueness;
3. Develop innovation and the capacity for organizational learning.

The expatriation process is known for the longer exposure to another culture, which involves not only professional aspects but also everyday issues. As suggested by Freitas (1999), international experience requires that the executive have an open mind, a liking for challenges, curiosity regarding what is different, a genuine capacity to observe and read scenarios, and respect for a symbolic cultural reality diverse from his or her own. These are all aspects intimately associated with the concepts of

learning we have seen above. During the expatriation period, the individual is placed in a context different from his or her own, in zones outside his or her control (the individual no longer has the reference of the uncertainty zones previously controlled).

Joly (1993) in his article "Alterity: Being an executive abroad," considers expatriation an intercultural experience that involves a process of dismantling and restructuring in the contexts of culture, of society, and of the individual itself. This process directly implies reconstruction of relational circles, requiring social actors to rebuild their alliances, establish new uncertainty zones, join (when going) and rejoin (when coming back) new power games, and define a new strategic action capacity, all of which represent the learning of new competencies, as we have seen in Crozier & Friedberg (1981).

Still in regard to the organization's development aspects, Pautrot & Girouard (2004) point out that expatriation favors the introduction of specific expertise in different regions as well as a group governance model, in addition to the "feeling of belonging" to a single organization.

4.2 FRAMEWORKS ASSOCIATED WITH THE STUDY OF EXPATRIATION

Authors who study the expatriation process, such as Joly (1993) and Cerdin (2002), identify some phases in this process that following the insertion of the individuals in their new culture, from wonderment at the new to rejection, withdrawal, or adaptation.

Different factors can influence these moments and favor or not individuals' adaptation to their new environment.

We could call one line the "culturalist" line, according to which cultural aspects play a predominant role in this adaptation. Among the studies researched, those of Richardson & Rullo (1992), Rushing & Kleiner (2003), Baruch & Altman (2004), and Freitas (1999) argue that factors associated with the failure of the expatriation process are associated with the problems of cultural adaptation of the individual and/or his or her family.

We deepen our understanding of this line in the studies of Philippe D'Iribarne (1993). According to D'Iribarne (1993), culture "is, above all, a language, a code," a context. Culture provides a referent that enables the different social actors to make sense of the world in which they live, defining principles of classification that allow society to organize itself into distinct groups and professional categories. It influences individual approaches that permit strategic games. Thus, there are not interests or desires purely "natural," regardless of the meanings associated with the object of this game. They are forms of opposition in each culture that lead to a certain organization of interests.

Applying the observations and conclusions drawn by D'Iribarne (1993) to the expatriation context, we can understand that expatriates adapting to a new context must necessarily undergo understanding and adaptation of the new cultural context or environment.

A group of authors believes that the aspects we have identified are part of the psychodynamic line. According to this line of thinking, some aspects of the expatriates' personal dynamics have a fundamental impact on the expatriation process. Joly (1993) refers to them as one of the components of the social and cultural framework of which the individual is part, and which determine the individual's adaptation to different environments. According to this author, the three dimensions of personality as defined by Freud, the id, the source of unconscious impulses, the ego, and the superego "become a part of the base personality, transmitted by the social system, and the characteristics of the subgroup to which this individual belongs." In this dimension of the individual tensions between impulses emanated by the personality and the cultural demands of the individual's environment are managed. We can understand that the capacity to manage these individual tensions associated with each individual's psychodynamics is, according to this line of thinking, the relevant point for the expatriation processes (JOLY, 1992; AMADO, 1998; RAENKOVIC, 1998; LEWIS, 1997; OSTORN, 1997).

Finally, we identify a third line of thinking (which will be the deeper focus of our study) that points to aspects associated with what we have called the power stream that decisively interfere in the expatriation process. This line mirrors the studies of Crozier & Friedberg (1983), according to which expatriated individuals in a new country are exposed to new games and diverse interests.

Their inclusion implies discerning the existing power games in this new environment and developing strategic actions that result in the renegotiation of interests that enable these individuals to achieve their objectives. The interest in collaboration and negotiation as ways to achieve their objectives and success is a relevant aspect of this line of thinking.

According to this point of view, the power relations between the players and the strategic games that govern their interactions in the organization – seen by the players as a “kingdom of relations of power and influence” – are quite predominant. In this environment, choices and decisions are of vital importance. For these individuals, they are associated with a limited rationality, which is associated with the system’s rationality and the players’ rationality.

New choices and decisions imply changes – the structuring of new forms of collective action – that are at the base of the process of learning new competencies (the key objective of the expatriation process), a process that requires rupture with the former “games.”

These choices, the rupture process and the renegotiation of new power spaces, will represent different challenges considering the context in which the power games are organized and the flow undergone by the expatriated individual, which we will represent here in two vectors:

- 1 The flow of the expatriate from the “outskirts of power” to headquarters;
- 2 The flow of the expatriate from headquarters to the “outskirts of power.”

In order to develop our studies, we will use the following hypotheses:

5 HYPOTHESES

5.1 HYPOTHESES REGARDING EXECUTIVES GOING FROM THE MAIN OFFICE TO THE OUTSKIRTS OF POWER (SUBSIDIARY)

H1a: An executive transferred from headquarters to a subsidiary to hold a top-management position has already demonstrated strategic-action skill in his or her country of origin, building high-level strategic alliances at headquarters.

H1b: These strategic alliances have enabled this executive to secure a command position at a subsidiary.

H1c: An expatriate going from headquarters to a subsidiary can more easily join the local power games at the subsidiary.

H1d: Staff at subsidiaries eager to collaborate with this expatriate to “rub shoulders” with the headquarters’ central power, represented by this executive.

5.2 HYPOTHESES REGARDING EXECUTIVES GOING FROM THE OUTSKIRTS OF POWER (SUBSIDIARY) TO THE HEADQUARTERS

H2a: An expatriate going from the outskirts of power (a subsidiary) to headquarters faces more difficulties to join the headquarters’ power games.

H2b: An expatriate going from the outskirts of power (a subsidiary) to headquarters who manages to successfully conclude the expatriation process probably built strategic alliances at headquarters and will join the local power games.

If H2b is confirmed, it becomes clear that in this case the expatriation process enables individuals going from the outskirts to the center of power to develop the capacity for strategic action; this allows organizations to select executives who have proven negotiation and adaptation skills in the face of change, in addition to knowledge and skill.

6 METHODOLOGICAL PROCEDURE: Ethnographic Technique And Narrative

We interviewed eight executives. Four were French expatriates in Brazil and four were Brazilian expatriates in France. All worked for the same company, a French multinational.

This study has only an exploratory nature. It was designed to examine whether these narratives from the perspective of the interviewees can support these hypotheses. If the results are positive, this study will result in a future quantitative study.

We understand the limitations of this method regarding the generalizations of the hypotheses.

Ethnomethodology, which employs the concept of social interaction (identified in the studies of Berger & Luckmann, 2003), is a suitable method for comparative studies between different cultures, as defended by Alvesson & Skoldberg (1999).

According to Berger (2000), the study of organizations enables the observation of conflicts between different visions of the world and interests. In his opinion, a researcher should investigate not only what social worlds are represented in society, but also what spheres belong to each of these social worlds. The understanding of evolution, of change, and of the working of an organization demands an examination of relationships. Berger (2000) believes that some organizations should be seen as “arenas” where members of different social worlds have diverse interests, pursue specific objectives, and struggle, suggesting or dismantling political alliances to achieve these objectives. In the opinion of Berger, an organizational theory that ignores these concerns can lead us to mistaken conclusions.

The researcher, based on the symbolic interactionism and on ethnomethodology, should unveil the various forms of social identity found in organizations and their inter-relationships in the organizational political arena. The researcher should also study the political system, each group’s negotiations and strategies, and the transmission processes in a given symbolic universe.

The researcher starts the field investigation with a theme and some premises and ideas, but not closed hypotheses. The building of the theory and the confirmation or not of the hypotheses happen progressively, as the researcher observes new facts and creates a research diary (GARFINKEL, 1976).

Czarniawska (1997) points out the importance of ethnomethodology, but believes that it may find it hard to explain connections between the various accountability rules observed in human action. According to Czarniawska, the way to understand human action is to place it in the narrative of the individual’s history, which in turn must be part of the narrative of the history of the social context, which leads to the connections that Czarniawska believes are not fully dealt with by ethnomethodology. Therefore, we use both ethnomethodology and narrative in a complementary manner in this study.

We performed eight semi-structured interviews from November 2004 to February 2005. In these interviews we let the interviewees talk freely about their experiences (“their histories”), trying to understand the difficulties and phases they and their families faced when adapting to a foreign culture, and what helped and what hindered the expatriation process.

We interviewed individuals of the same company (called Company X) who had an expatriation period of above two years. All of them had the same educational level (university degree) and at the time of the expatriation held a position equivalent to at least the first level of the company’s top management.

Company X is French, active in the chemical industry. Originally a government-owned company, today it is privately held. It has been in operation in France for more than one hundred years and in Brazil for more than 80 years. Throughout its history, Company X has always invested in expatriation processes as a way to promote the exchange of knowledge, the development of internal talent, and the alignment of management patterns.

The eight interviews were distributed as follows:

- Four interviews were held with French managers, who were or are expatriates in Brazil (identified as EO1, EO2, EO3, and EO4). They represent what in our hypotheses we called the flow from the center of power (French headquarters) to the outskirts of power (the Brazilian subsidiary).
- Four interviews were held with Brazilians who were or are expatriates in France (identified as EO5, EO6, EO7, and EO8). They represent what in our hypotheses we called the flow from the outskirts of power (the Brazilian subsidiary) to the center of power (French headquarters).

7 ANALYSIS OF THE INTERVIEWS: French Expatriates In Brazil

French managers who came to Brazil had a clear mission: They were company representatives to, in some way, “transform” the Brazilian subsidiary or introduce new work methodologies. In other words, they were representatives of the headquarters’ power to execute the necessary changes in the Brazilian subsidiary. They were all prepared for this mission. Excerpts from their interviews illustrate these aspects:

EO1:

Regarding the mission to intervene in the subsidiary:

- [heard from one of the managers in charge at the headquarters, when invited to work in Brazil] “we were looking for someone to go to Brazil and take charge of the chemical area in that country, and I thought about you.”
- “When I arrived in Brazil, it was the end of a time of leadership held by a very strong individual. Brazil was isolated from the rest of the company, a wholly closed organization that did not allow the French to know what happened in there. My mission was to ‘open’ the organization in Brazil and have it join the group.”

EO2:

Regarding his/her preparation:

- “...it was decided that I should go to Brazil following some special training in the textile area, which I was not familiar with at the time. I spent nine months in Arras, Valence, and Lyon (French cities where Company X had textile plants) and left for Brazil...”
- “...the training I received showed me they meant business. I knew I would not be left out in the cold. The training was provided to give me solid, positive knowledge, so that I could really exercise my position, and not hang about for a year before doing something interesting.”

EO3:

Regarding the mission to intervene in the subsidiary:

- “I held the position of General Manager of the Textile Division (in France, in Lyon, I was in charge of production = I was promoted to a better position). I came to Brazil to replace Mr. A, who later would become the CEO of the company in Brazil.”
- “In my case, the company was looking for someone experienced to improve the general level of the work method [in Brazil], both in research as well as at the plants.”
- “In fact, I can say that our adaptation was very good; I believe an important point was the preparation in France....”

Regarding the mission to transfer work methodologies:

- “I was assigned specifically to transfer some work methods.”

EO4:

Regarding the mission to intervene in the subsidiary:

- “[when I received the invitation, they said] ‘we need ... you to go to Brazil, to take care of Latin America from Brazil.’ In addition to taking care of the business, the mission was to resist the pressure from Company X in Brazil, without being steamrolled by Company X’s president in Brazil [Mr. A, who at the time had a very strong position].” Note: This is the same Mr. A already mentioned by EO3.

All French expatriates in Brazil considered their adaptation in Brazil easy and fast. They attributed this to the fact that they represented headquarters' power and spoke on behalf of headquarters.

In these interviews, all four hypotheses were confirmed, in light of the facts described by the interviewees. The excerpts above are only the most illustrative parts of the interviews.

7.1 ANALYSIS OF THE INTERVIEWS: Brazilian Expatriated In France

The situation was different regarding Brazilian expatriates in France. They received no preparation and did not arrive with a clearly set mission. They received no warm welcome from the French and to stake out their turf they had to take firmer attitudes with the French (as illustrated by EO5), or join the local patterns, as shown in the following excerpts:

EO5:

- “They were receiving me because the company in Brazil had decided to train Brazilians. This meant I was under training. Yet I did not feel like a trainee – I was there to work. This caused a great, a huge conflict when I arrived.”
- “At the time, one of the local directors [in France] was a Brazilian and he called me for a chat. I explained the context to him. He understood my difficulties and things started to change. After that I started to have a function, a decent assignment, and a mission.”

EO6:

- “...I managed to carry out my work in spite of some people...who should have been helping me – to the contrary, they were hindering me.”
- “The corporate environment is a political environment. Nobody there felt safe and very few felt contented; it was a very unstable environment. People saw everyone as a threat.”
- [on how he/she dealt with people] “I had to fight. It had to be an individual fight because each person reacted in a particular way. For each person I had a distinct approach strategy.”

EO7:

- “From the city/nation perspective, my adaptation was very easy.... From the work perspective it was not the same...”

EO8:

- “Then [after a few months of internship] I started to work at the headquarters. I started to have a cultural and style shock.”
- “[to adapt myself] I sought a strategy – if you can call it that. I tried to establish some relationships with younger people, those about my age, at about the same point in the career, young French talent. We became good friends. I slowly learned how the *siège* worked...”
- “When they [in France] saw that I, on my own, had decided to enroll in INSEAD, things changed [receptivity improved]. Because in France the *Grandes Écoles* are very important...”
- “I did not ask for a position to work; I got there and accepted what they offered me...”
- [critical factors for a successful expatriation] “Effort to master the language; networking, knowing who the ‘good old boys’ of the office were, the young people or those who counted; trying to approach these people, be accepted and ‘join the club’; not being too picky regarding what they offered me.”

The excerpts above are just some examples. Nonetheless, in the case of these expatriates, our two hypotheses were also confirmed in the analysis of the recorded interviews.

As our hypothesis H2a shows, “An expatriate going from the outskirts of power (a subsidiary) to headquarters faces more difficulties to join the headquarters’ power games.” This hypothesis was supported because all expatriates acknowledged this difficulty, providing concrete examples of this situation.

As our hypothesis H2b shows: “An expatriate going from the outskirts of power (a subsidiary) to headquarters who manages to successfully conclude the expatriation process probably built strategic alliances at headquarters and will join the local power games.” The narratives also supported this hypothesis, based on the facts described by the interviewees.

8 CONCLUSION

Our hypotheses were supported by the eight interviews, in an exploratory study the objective of which is only to suggest some ideas for reflection and discussion, and to suggest future studies of a quantitative nature that can test these hypotheses in some contexts and validate them or not.

Our review of the literature has shown that many times learning organizations are depicted as a utopian organizational form, and that when this type of organization is successful it allows individuals to exchange information and learn together in an environment of total collaboration, in which power is not taken into consideration.

This statement challenges the proposition of the learning organizations.

Change and learning imply a rupture of cultural patterns, relational forms, technical competencies, and the power structure of the previous system.

Individuals who are valued in a system for their competence around a given product will lose power when new products are created, which will replace the first as a success factor of the organization. These individuals must know how to restructure themselves from the technical and relational perspective, and rebuild their strategic alliances.

A more realistic approach considers the need to recruit individuals who have a good capacity for strategic action, in addition to technical and relational competence, and learning capability.

Politicized individuals who know how to negotiate will have a better probability of committing themselves to change and to the new organizational systems that go hand-in-hand with innovation than individuals who lack independence and critical sense.

The double-loop learning concept implies questioning procedures, standards, and rules, to produce change.

Expatriation, especially the expatriation of young executives going from the outskirts of power to the center of power – from subsidiaries to headquarters – can encourage the development of a capacity for strategic action in individuals and allow them to know how to deal effectively with situations of change, resulting in successful innovation processes. Studies to this effect enable the establishment of a more realistic approach for the proposals of the learning organization, because they take into consideration the power approach.

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