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Expatriate development: the use of 360-degree feedback

Kyle W. Luthans
Department of Management and Marketing, University of Nebraska-Kearney, Kearney, Nebraska, USA, and
Steve Farner
College of Business, Bellevue University, Omaha, Nebraska, USA

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Abstract *This article first reviews the status of expatriate training and the need to evaluate the transfer of this training to expatriate managers on-the-job in a foreign culture. A multisource or 360-degree feedback system is proposed as both a way to evaluate expatriate cultural training at the behavioral and performance levels, as well as a way to develop expatriates to make them more effective once in the local culture. A proposed expatriate management effectiveness questionnaire (EMEQ) is described in terms of its theoretical foundation and specific scales, and how it could be used in a multisource feedback program for the effective development of expatriate managers.*

Primarily driven by an upsurge in international joint ventures and strategic alliances as well as the emergence of small to medium-sized organizations as key players in the global marketplace, an increased premium has been placed on the ability of today's organizations to develop managers for international work assignments. The complex and ever-changing world of international management requires not only cultural awareness and sensitivity, but also the ability to change, develop, and improve on-the-job performance. In response to this challenge, most multinational corporations (MNCs) have pursued cross-cultural training programs for their expatriate managers in order to make them more culturally aware and effective in their international assignments (Harris and Kumra, 2000). In fact, one recent survey indicated that almost two-thirds of MNCs offer some type of cultural development program for their expatriates (Fitzgerald-Turner, 1997). This figure is up from 1990 estimates of only 30 to 45 percent of MNCs providing some form of cultural training for expatriates (Dunbar and Katcher, 1990).

Although expatriate cultural training is now widely accepted and used, there has been to date very little attention devoted to evaluating this training's effectiveness and better fitting expatriate managers to the local culture to make them more effective once on the job. Given this situation, the purpose of this article is to first review the dimensions of effective expatriate cultural training and how it should be evaluated through the well known levels of reaction, learning, behavioral change and performance improvement (Kirkpatrick, 1994). Then, the major contribution of the article is to suggest and specifically describe

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how a systematically applied multisource or 360-degree feedback questionnaire can be used to both evaluate the effectiveness of the expatriate cultural training and provide information and coaching to develop the expatriate on-the-job.

The importance of developing expatriates for overseas assignments

One of the main reasons for effective cultural training is to help control the failure rate of expatriate managers. Defined as the premature return by an expatriate from an overseas assignment, failure rates are between 25 and 40 percent when the expatriate is assigned to a developed country and a whopping 70 percent when the expatriate is assigned to a still-developing country (Shay and Tracey, 1997). An overwhelming majority of these failures is attributed to the expatriate's and/or spouse's inability to adapt to the new culture (Thomas, 1998; Tung, 1988).

Costs associated with expatriate failure run high. Depending on the job or the location, estimates of the direct cost of premature returns by expatriate managers is between $250,000 and $1 million. Taken as a whole, expatriate failure in MNCs runs in the billions of dollars. In addition, there are unknown and indirect costs associated with expatriate failure in terms of the disruptions and missed opportunities in developing markets and revenues abroad (Harrison, 1994).

The importance of developing expatriate managers for their overseas assignment through the utilization of cross-cultural training seems apparent. Considerable research supports that cultural training can have a positive effect on cultural adjustment and expatriate performance (Frazee, 1999; Deshpande and Viswesvaran, 1992). Caudron (1991) highlights some specific dimensions which cultural training can help in reducing costly expatriate failure and increase the effectiveness of their assignment:

- *Negotiation styles*. Expatriates should be made aware that negotiation styles vary widely from country to country. For example, in Russia negotiations are conflict oriented. However, in Asian cultures, more of a consensus-oriented negotiating style is more appropriate.
- *Communication*. In the USA, business associates have a tendency to address each other by first names right after being introduced. However, in France it may take three to six months before business associates feel comfortable addressing each other without a formal title. Non-verbal cues can also be barriers to effective communication. For example, standing too far from a Middle Easterner or standing too close to a Spaniard can be interpreted by both as a lack of interest.
- *Social relations*. Americans tend to place a high value on informality as a way of creating a comfortable environment. Conversely, Europeans tend to be more formal, both in dress and demeanor, while conducting business or entertaining guests. As a result, Europeans may interpret the informal

environment as a sign of disrespect. On the other hand, Americans may interpret European formality as stiff and unfriendly.

- *Family lifestyle adjustment*. Concerns associated with everyday lifestyle adjustment in another country, such as where to shop, how to get the kids to school, and how to decode the public transportation system can be quite stressful for expatriates and their families.

How to improve expatriate training

The expatriate cultural training for the above types of dimensions must be tailored to each country and even subcultures (e.g. social vs business) to be effective. In other words, a contingency or "if-then" approach should be utilized when designing and delivering cultural training programs (Luthans *et al.*, 1997; Rasmusson, 1999). This training should not only include the above four dimensions but also help the expatriate develop their management and interpersonal skills and a sense of efficacy (confidence) and leadership effectiveness.

There is no question that comprehensive cultural training can have many benefits for MNCs. For starters, it can help orient and develop expatriates to better communicate, understand, and work effectively with people from different cultural, religious, and ethnic backgrounds. Comprehending and valuing cultural differences can also help expatriates in the effective management of multicultural teams. Understanding global markets, customers, suppliers, and competitors is another indirect benefit. Pragmatically, cultural training can have a positive impact on combating very expensive expatriate failure.

Besides these obvious benefits that mainly result from simple cultural awareness and sensitivity gained from the training received, the more important and sustainable interpersonal skills (e.g. listening, providing feedback and recognition, and a caring, empathetic concern for associates) and management skills (e.g. planning, coordinating and controlling the work and coming up with and implementing innovative ideas to improve the work) in other cultures are not found in most training programs for expatriates. The more subtle, but potentially even more important, efficacy (confidence) building and leadership effectiveness in other cultures are badly neglected or ignored in expatriate training programs and may be the reason for performance problems. For example, survey data consisting of 409 expatriates from 49 MNCs revealed that while most felt culturally aware in their overseas assignments and had a positive experience, over two-thirds of the respondents indicated that they could have been better prepared through more extensive training programs (Light, 1997). In addition, one needs only to look at the high rate of expatriate failure to realize that something is wrong with the traditional approach to expatriate training and development.

The time has come in IHRM to give more attention not only to the design and content of expatriate training *per se*, but also the neglected evaluation of this

training and the development of interpersonal and management skills as well as efficacy building and leadership effectiveness. After first presenting the classic Kirkpatrick (1994) training evaluation model, we suggest that the use of multisource (360-degree) feedback provides a way to both evaluate the learning, behavioral change and performance improvement outcomes of the expatriate training and a way to develop expatriates while in their assignments to make them more effective.

The training evaluation framework

Although there are various training evaluation models, the most widely recognized and comprehensive approach is provided by Kirkpatrick (1994). He suggests that all training programs should be evaluated on four basic levels – reaction, learning, behavior change, and performance improvement. These four basic levels can be summarized and applied to expatriate training as follows:

(1) *Reaction (level 1)*. Reaction measures are designed to assess the trainees' opinions regarding the expatriate training program just completed. Although a favorable reaction to a program does not guarantee transfer to the expatriate's job assignment in another country, it is important to measure for the following reasons. First, if the expatriates are not positive and enthused, there is little chance for future benefit. Unfortunately, if they are positive it does not necessarily follow that there will be carryover to the international assignment. Second, it provides suggestions on improving future programs. Third, reactions can provide quantitative, easy to understand data that the trainers can use to demonstrate the success of the expatriate training. Finally, trainee reactions can provide trainers with information that can be used to establish relative standards of performance for the design and conduct of future cultural training programs of expatriates.

(2) *Learning (level 2)*. Measuring learning in this second level of evaluation means determining one or more of the following: what knowledge did the expatriate learn? What attitudes and values were changed? It is important to measure learning because no change in behavior on the international assignment and subsequent performance can be expected unless one or more of the learning objectives have been accomplished. The importance of evaluating learning especially applies to cultural training. It is important to determine if indeed the expatriates have developed the requisite knowledge and understanding of the culture in which they will be assigned. Like the level 1 reaction evaluation, this level 2 learning can be assessed at the conclusion of the training program and deficiencies can be addressed.

(3) *Behavioral assessment (level 3)*. The first two levels of evaluation are necessary but not sufficient. The real key to effective expatriate training

and development is behavioral change. It is one thing to get a favorable reaction and have cognitive learning take place. It is quite another to have desired on-the-job behaviors in the foreign culture actually occur. The reason why behavioral change is so important is because Likert's (1967) classic work on the causal relationship between attitude change – behavioral change – and performance change and behavioral management researchers have clearly shown that behavioral change can lead to performance improvement. For example, in their meta-analysis, Stajkovic and Luthans (1997) found an average improvement in performance of 17 percent from behavioral change interventions in 19 studies and specifically this behavioral approach also led to significant improvement in performance in foreign operations (Welsh *et al.*, 1993). Behavioral change due to the expatriate training is difficult to assess, but we propose the multisource feedback technique is a relatively easy way to effectively determine if others perceive that the expatriate is actually doing the desired behaviors targeted in the training; that they are occurring on-the-job in the actual culture.

(4) *Performance results (level 4)*. As indicated above, although behavioral change on-the-job is key, what it leads to, the fourth level of evaluation of performance improvement measured by outcomes such as productivity, retention, customer satisfaction, and profits is even more important. In the final analysis, this performance level is what the previous levels of evaluation are aimed at and is the real test of the effectiveness of expatriate cultural training programs.

The remainder of this article describes the multisource (360-degree) feedback approach that is proposed to effectively evaluate the behavioral change level of the training impact and also provide the most valid and valuable information available to help develop and adapt expatriates once in the local culture to make them effective performers.

Multisource (360-degree) feedback

Multisource or 360-degree feedback is an increasingly popular process by which managers receive various ratings from a variety of sources. These sources include peers (co-workers), managers, direct reports, and sometimes, even customers (thus the term 360 degrees). Information gathered from this technique can be used for both developmental (helping to identify strengths and performance gaps) and administrative (performance appraisal, training evaluation, promotion, etc.) purposes. The past decade has seen a tremendous increase in the use of this approach for a variety of reasons. One is that the jobs of today are increasingly complex, and the traditional method of having a supervisor rate a direct report's performance falls well short in giving adequate amounts of quality information in order to improve performance. Another

reason is that the trend towards empowerment and downsizing has shifted the burden for personal development to the employee (Tornow and London, 1998). Typically, organizations fall short of providing managers with a clear, long-term career path. This forces individual managers to assess their own strengths and weaknesses through perceptions based on little or no objective feedback.

There are many different methods, surveys, and implementation techniques used in multisource programs (Bracken *et al.*, 2001). We first provide the conceptual background for 360 programs in general and then describe the development and implementation of our proposed program for evaluating expatriate managers' training and its use for on-the-job development.

The conceptual foundation

The 360-degree feedback approach draws its conceptual roots from several different areas. One is the traditional organizational development technique of using surveys to assess employees' perceptions. These surveys measure items such as satisfaction with management, supervisors, pay, work procedures, or formal policies of the organization. The survey information is then fed back to those that generated it, with the goal of developing an action plan to improve the organization. In the traditional organization development literature, this survey feedback technique has been well received.

Another area in which 360-degree feedback has strong conceptual roots is in the performance appraisal literature. Again, today's business climate has forced organizations to provide much more information than the traditional performance review provides, thus spawning such creative efforts as 360-degree feedback. It is now recognized that managers can improve their performance through increased information. Social cognitive theory (Bandura, 1986; Stajkovic and Luthans, 1998a), in particular the dimension of self-awareness, can be used to explain. This theory states that humans have the ability to assess their own capabilities and skills, and they often evaluate themselves quite differently than others do. Therefore, the 360-degree process provides managers with an external source of information designed to increase their self-awareness. This enhanced self-awareness may improve managerial effectiveness by providing individuals with another source of outside information regarding what others expect of him/her (Fletcher and Baldry, 2000). This seems particularly important for helping to develop expatriate managers who may not be clear as to what locals expect of them in the culture.

Although surveys have found that the majority of US firms have implemented some form of 360-degree feedback (Edwards and Ewen, 1996), they are not that common in other countries. Part of the reason can be explained by the fact that most of the instruments and implementation techniques have been developed in the USA. For international human resources management (IHRM), cultural issues associated with both the design of the 360 instruments

and the interpretation of the results must be considered (e.g. by the contingency approach discussed earlier).

Implementation issues across cultures

Leslie *et al.* (1998) discuss five different cultural assumptions that managers in the USA have regarding the implementation of 360 programs. The following assumptions need to be assessed when developing a program for managers working overseas, because other cultures may not respond well to such an approach (see Leslie *et al.*, 1998, pp. 198-206):

(1) *The process of growth and development in the workplace is ongoing*. Some cultures simply don't subscribe to the same notion that feedback is valuable and can guide manager development. For instance, some cultures such as France may place more value on lineage of social class than developing managers. Another example is the belief in some countries outside the USA that managers are born, not made. In other words, different cultures may have dramatic differences regarding the assumption of the value of developing managers.

(2) *Constructs measured by 360-degree instruments are appropriate for most workplaces and cultures*. With different cultures placing different values on certain constructs, it is important to consider measurement issues when taking an instrument to a different culture. For example, when analyzing an effective decision maker, the French would value a decision based upon a thorough review of all of the information, while in the USA, an effective decision maker may be the one who acts quickly, not necessarily taking in all of the information (Dalton *et al.*, 1996).

(3) *It is both acceptable and valuable to ask bosses, peers, direct reports, and customers for developmental feedback*. Even if all parties are assured of confidentiality, different cultures may still find it a shock to be asked for such personal information regarding their bosses. In fact, in Latin American countries, US managers tend to find that it is difficult to get those that report directly to them to give negative feedback (Wilson *et al.*, 1996). Another example would be the Asian value of "saving face". In both of these types of cultures, a request for the type of information gathered in a 360 instrument could come across as offensive.

(4) *Managers will accept results as accurate and truthful when the 360 data are kept confidential and when the raters are guaranteed anonymity*. Although it is common in the USA for managers to accept the results of an anonymous program, it is often difficult in other cultures to implement this. For example, high power distance (i.e. considerable respect for authority) countries such as India and Mexico are characterized by bosses who feel entitled to view the information, and their direct reports generally hold this view also. This means that no

level of assurance of confidentiality may work, as employees may volunteer their input, or at least feel obligated to tell what they said, if requested by their managers.

(5) *Survey questionnaires as used in the 360 approach reliably and validly measure individual differences.* It is important to note that the use of surveys in general to describe organizational characteristics and employee attitudes is not as common in other parts of the world as they are in the USA. Therefore, it is important to give attention to the role of surveys *per se* when using them in a particular culture.

The above discussion of theoretical foundation and implementation issues across cultures serve as the point of departure for developing our proposed 360 instrument for expatriates.

A proposed expatriate management effectiveness questionnaire (EMEQ)

The 360 instrument that we propose (EMEQ) measures perceptions across six dimensions or scales: technical competence, management skills, interpersonal skills, confidence/efficacy, leadership effectiveness, and cultural fit. Besides Bandura's (1986) self-awareness from social cognitive theory and the issues that must be considered when taking US-based 360 approaches to other cultures, the following specific dimensions or scales for our proposed instrument were mainly drawn from Katz's (1974) classic technical, conceptual and human dimensions; Mintzberg's (1973) nature of managerial work; and Luthans' (1988) real managers:

- *Technical competence*. The expatriate's perceived technical competence from the manager, subordinates and peers (hereafter referred to as "others") would be measured by items such as "This person is able to answer my questions" and "This person is technically competent".
- *Management skills*. This scale would measure the perceptions that the others have of the expatriate's ability to solve specific problems and contribute to the MNC's broad goals. Also included in this scale would be the ability to plan, coordinate the work, schedule resources, try out new ideas, and control and follow-up. The focus would be on items considered as traditional management duties and skills. These would be measured by such items as "Achieves effective workflow through coordination and scheduling of resources", "Takes initiative, shows inventiveness, and is willing to try new ideas", and "Follows up and gets things done".
- *Interpersonal skills*. This scale would measure the others' perception of the expatriate's capability to get along with and work through others in a caring way. Included in this would be items such as the expatriate's listening skills, giving credit and feedback to other workers, and in general having a caring, empathetic concern for everyone. This would include specific items such as: "Provides me with timely information and feedback",

"Listens to my ideas and concerns", "Recognizes and gives credit to others who deserve it", and "Has a caring empathetic concern for others".

- *Leadership effectiveness.* This scale would measure the others' view of the expatriate's desire and confidence to lead and work through people to accomplish assigned duties and would include items such as "Likes to work with and through others to accomplish assigned duties", and "Exhibits confidence in being able to lead others". The effectiveness side of this scale would ask the multisources to rate "Overall, this person is effective in his or her current position", and "This person is loyal and committed to this organization".

Whereas the above four scales would be traditionally covered in most 360 instruments, the last two scales of confidence/efficacy and cultural fit are quite unique and we feel the value-added contribution of our proposed EMEQ 360 instrument. Like self-awareness, self-efficacy is a derivative of Bandura's (1986, 1997) social cognitive theory. He defines self-efficacy as "how well one can execute courses of action required to deal with prospective situations" (Bandura, 1982, p. 122), and could be simply operationalized as a task- and context-specific measure of the expatriate's confidence.

The reason the confidence/efficacy scale is included in the proposed EMEQ is not only because it comes out of the social cognitive theory base, but also because we feel it makes a major contribution to the neglected third (behavioral change) and fourth (performance improvement) levels of evaluation of expatriate training and development. In terms of the third level, Bandura (1997) cites considerable research that individuals who perceive themselves as highly efficacious will activate sufficient effort which will lead to behaviors leading to successful outcomes. In turn, these successful outcomes will reinforce competency behaviors. On the other hand, those who perceive themselves to have low levels of self-efficacy are more likely to cease their behaviors before successful completion of the task and thus retain negative expectations about their personal competence regarding the task. This occurs because before individuals choose to perform tasks, they consider information about their perceived ability. This will determine both how much effort will be expended and how long the effort will be sustained despite problems and failures.

In terms of the fourth level of evaluation, self-efficacy has received considerable attention in the literature in the last few years, primarily because of its relationship with performance. For example, a meta analysis of 114 studies by Stajkovic and Luthans (1998a) confirms the strong relationship (0.38) between self-efficacy and work-related performance. Thus, by measuring the confidence/efficacy of the expatriate, the fourth level of evaluation can be inferred and given at least some credible evidence of the impact the expatriate has or can make to performance improvement. Thus, we propose the following final components of our EMEQ:

- *Confidence/efficacy*. The measurement of this unique scale includes such items as "Puts forth considerable effort to effectively accomplish assigned duties", "Persists when encountering obstacles or problems", and "Exhibits confidence in being able to successfully accomplish assigned duties". These questions would assess not only others' perception of the global levels of the expatriate's confidence, but also considers efficacy in the specific context of his/her specific job in the foreign culture and how much effort and persistence are exhibited. In comparing the self-ratings of confidence/efficacy with the ratings of others in the local culture, the process would be able to pinpoint discrepancies in the expatriate's self-efficacy which may call for building self-efficacy through successful experiences, modeling, and the feedback from others (Bandura, 1997; Stajkovic and Luthans, 1998a). Enhanced efficacy in turn we propose would lead to improved expatriate performance (Stajkovic and Luthans, 1998b).
- *Cultural fit*. The questions in this final scale of the EMEQ need to assesses the degree to which the manager is "fitting in" to the local culture. This recognizes the contingency (if-then) nature of cultural fit for expatriate training and development discussed earlier. Questions would include such items as: "I would feel comfortable inviting this person to dinner in my home", or "This person understands our customs and traditions".

Implementation of the 360 program for expatriates

In addition to development of the instrument, we also propose the most effective steps for implementation. First, every effort should be made to assure the participants of complete confidentiality. If results are to be accurate and useful, they cannot be used for other purposes besides the expatriate's own personal development. If expatriates perceive that others in the home office or at the local site will see the results and use them for evaluation or political purposes, they most likely will not give them to anyone who will give them constructive feedback or criticism. Likewise, if the collected information is perceived as having other uses, it is quite likely that those filling out the surveys would not give accurate, constructive feedback. But if anonymous, there is no reason to either ingratiate nor degrade the expatriate. One way to achieve confidentiality is to make sure top management and those filling out the EMEQ completely understand and believe in the program and uses an outside consultant to gather and process the data, and provide one-on-one feedback. As noted previously, this confidentiality can be especially difficult to ensure in high power distance countries, but if framed right, we feel can be accomplished.

After confidentiality and anonymity is assured, a packet would be distributed to each expatriate. The packet should contain a cover letter detailing the purpose of the program and the directions. Also included in the packet would be several blank EMEQ surveys with six pre-addressed and

stamped envelopes to send to an outside consultant. The first step would be for the expatriates to fill out the EMEQ, evaluating how they perceive themselves on the six dimensions outlined in the previous section. Then, the expatriate would distribute the remaining EMEQs to others in the organization. The expatriate may be allowed to choose who fills out the questionnaire, with emphasis on giving them to those who can provide them with the most accurate, useful information regarding the six dimensions. They should be reminded that it is of little use to give the EMEQ to those whom they already know how they will answer, either positive or negative. They should be encouraged to give it to those who can honestly and objectively assess the six dimensions. As the 360-degree name implies, the EMEQs are given to the boss, two or more peers, three or more direct reports and even customers, if appropriate. The surveys should then be tabulated by the outside consultant and the average calculated from aggregated data (not even broken down or identified by peers, manager or subordinates).

The presentation of the results

In line with the personal development thrust of this program, the results should be fed back in a positive coaching format by the outside consultant. The coaching session would begin by explaining and interpreting each of the six scales that were measured. This could then be shown as a summary table. This table would be followed by a visually appealing spider diagram, which is a hexagon with a scale going out from the middle for each dimension, comparing the self-perception with the average of all of the other responses. Such a spider diagram is useful for visually pinpointing both major areas of strength and weakness, and major areas of discrepancy between self and others' perceptions (Hodgetts and Luthans, 1998).

The expatriate's feedback could also include a more detailed analysis of each question. This would primarily be used to provide the expatriate with specific details on what they can improve upon. Sometimes, for example, a scale like "interpersonal skills" can show a low score, when really there is only one thing wrong. The expatriates need to know this in developing their own personal development action plan.

The final portion of the expatriates' feedback information sheets may include any subjective reactions offered by the others. These comments should be typed by the outside consultant to preserve the confidentiality. Although they can provide some valuable insight, the coach must caution the expatriate that although subjective comments tend to be very salient to recipients, they should not outweigh the more reliable and generalizable averages from the objective EMEQ.

A positive coaching approach

The coaching session should be conducted so that it turns out to be a very positive experience, regardless of the results. The emphasis in the coaching

should be on strengths, improving on what the expatriate does best, not what they do worst. Focusing on improving strengths is the best way to develop the expatriate's confidence and thus performance (Buckingham and Clifton, 2001; Luthans *et al.*, 2001). However, the identified deficiencies (especially if there is a discrepancy between the self and others) can be used to assist the expatriate in developing their own personal action plan for self-improvement in technical, managerial, interpersonal, leadership, confidence/efficacy and cultural fit. Such a development frame allows the coaching session to avoid discussing the six dimensions in terms of "weaknesses" or any other negative term. The guideline is that the coach makes sure the expatriates are aware of what others think, but focus on their strengths.

Cultural fit analysis

In addition to the personal development, a primary goal would be determining whether or not the expatriate is "fitting in". Because this is such an important requisite for expatriate success and retention, it is critical to give considerable attention to the cultural fit data from others who are locals. The cultural fit data can be used to evaluate the training the expatriate received back home. As opposed to the other five dimensions, expatriates should be very open to confidential feedback regarding how they are adapting to their new culture. This may be the only way they can really get at the truth of their cultural assimilation.

A final word

As global competitive battles heat up, the importance of developing expatriate managers for international success should not be overlooked. In search of a competitive advantage, MNCs are increasingly devoting more attention and resources toward cultural training as a way to improve the job performance of their international assignees. Before these programs are implemented, however, the following questions should be considered. Does cultural training really work? How can it be improved? We have proposed a multisource or 360-degree feedback technique as an effective tool for evaluating various levels of expatriate training, to ensure the previous questions are being addressed. The strength of this approach is that it helps to gather information from various sources in order to understand what behavioral changes and on-the-job performance improvements have resulted from the cultural training program. Our proposed EMEQ and steps of implementation would seem to offer considerable promise in helping evaluate the transfer of expatriate training and the development of expatriates on-the-job.

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