Expatriate adjustment as a multifaceted phenomenon: individual and organizational level predictors

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Expatriate adjustment as a multifaceted phenomenon: individual and organizational level predictors

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Abstract   A conceptual model is proposed that identifies critical antecedents of expatriate adjustment. Adjustment is conceptualized as the degree of fit between the expatriate manager and the environment, both work and socio-cultural. Adjustment is marked by both reduced conflict and increased effectiveness. As a multidimensional phenomenon, expatriate adjustment can be identified in psychological, socio-cultural and work domains. The model predicts that psychological and socio-cultural adjustment are the most immediate predictors of work adjustment. In this paper, it is asserted that the success of the expatriation process depends not only on the expatriate manager's competencies and skills, but also on organizational (both parent-company and local-unit) support and assistance prior to and during the assignment. Various international human resource management models are utilized to examine the organizational level antecedents of expatriate adjustment. Managerial resourcefulness, acculturation attitudes, personality dimensions and coping strategies are discussed in relation to individual predictors, whereas MNCs' international structure, value orientation, organizational life-cycle, diversity training, strategic planning and socialization are proposed as organizational predictors of expatriate adjustment.

Keywords   Expatriate, adjustment, resourcefulness, personality and attitudes, parent-company approach, local-unit preparation

In the era of global competition, the role of managers who are sent abroad for temporary assignments has become increasingly important especially for multinational companies (MNC). The primary role of an expatriate manager can be conceived as that of a catalyst who secures the continuity of the MNC's organizational structure and philosophy in the local unit while ensuring the fit between MNC practices and local demands. The extent to which an expatriate accomplishes this mission depends not only on the expatriate manager's competencies, but also on the way in which expatriation is handled by the MNC. This article, therefore, aims at examining both individual and organizational level antecedents of expatriate adjustment. Incorporating organizational antecedents of expatriate adjustment requires referral to issues such as MNCs' international structure (Shuler, Dowling and DeCieri, 1993), life-cycle (Milliman, Von Glinow and Nathan, 1991) and value orientation towards globalization (Rosenzweig and Singh, 1991) as they influence the international human resource management policies and practices.

Examining the process of expatriate adjustment is important for several reasons. First, failure of expatriate adjustment may cause premature return from overseas assignments, which may be very costly for the companies (Coperland and Griggs, 1985). In addition, non-financial costs of failure include damaged company reputation,

lost business opportunities and lost market or competitive share (Black and Gregersen, 1991; Naumann, 1992). Second, failure to complete the full cycle of the assignment is as harmful to the expatriate as it is to the parent and host companies. Inability of an expatriate to complete the assignment is likely to lower his/her self-esteem, self-confidence and cause a loss of prestige among co-workers (Mendenhall and Oddou, 1985; Tung, 1987). Third, an unsuccessful period of expatriation is likely to decrease both the subsequent commitment to the parent firm (Naumann, 1993) and job performance upon repatriation (Adler, 1981). Finally, an expatriate manager's failure will have an adverse impact on the decision of qualified managers to accept overseas posts (Stroh, 1995).

The majority of research on expatriation focuses on individual factors that predict adjustment and performance without paying adequate attention to organizational antecedents of adjustment. Comparative research on international human resource management practices (e.g., Brewster, 1988; Brewster and Pickard, 1994; Kopp, 1994; Tung, 1987) shows that expatriates of European-based companies are generally more successful in overseas assignments than their American counterparts, mainly due to more extensive preparation and training activities, and stronger support provided by European companies to their expatriates. It seems, however, that the significant role organizations play is being overlooked by US-based research and practices. This paper extends the previous comprehensive frameworks (e.g., Black, Mendenhall and Oddou, 1991; Naumann, 1992) by integrating expatriation, acculturation, coping, performance management, socialization and international human resource management literatures to present a conceptual model which identifies individual and organizational level antecedents of expatriate adjustment with three specific objectives: (1) to attract the attention of researchers and practitioners to under-studied predictors of expatriate adjustment, (2) to examine MNCs' expatriate management practices from an organizational development and change perspective, and (3) to bring some parsimony to what appears to be a fragmented literature.

The model

The basic rationale that underlies the model is that adjustment is a multifaceted phenomenon which is influenced by both the expatriate manager's characteristics and the organizational approach to expatriation. As such, successful adjustment is considered to be a function of both managerial competencies and organizational support (by both parent and local companies) provided prior to and during the assignment.

This understanding is reflected in the model by categorizing predictors of adjustment into 'employee characteristics' and 'organizational characteristics' which are discussed within two time periods: pre-departure and post-arrival. The unit of analysis for this model is the expatriate manager. However, inclusion of organizational factors calls for a cross-level analysis (Rousseau, 1985) . In this model, the impact of organizational practices (support and planning) on individual behaviour (expatriate manager's adjustment) is examined, which is commonly the case in organizational cross-level analyses (Klein, Dansereau and Hall, 1994).

In the next section, the concept of adjustment will be discussed. This is followed by an examination of antecedent variables and the ways in which each of them relates to adjustment outcomes. In the final section, implications of the model and conclusions will be presented.

Expatriate adjustment as a multifaceted phenomenon

Concept of adjustment

Although adjustment is a critical concept in the acculturation literature, there are problems associated with its definition and operationalization (Church, 1982). Adjustment and adaptation have been used interchangeably to indicate a feeling of acceptance and satisfaction (Brislin, 1981), acquisition of culturally acceptable skills and behaviours (Bochner, McLeod and Lin, 1977), the nature and the extent of interaction with host nationals (Sewell and Davidsen, 1961) or the lack of mental health problems such as stress or depression (Berry and Kim, 1988).

Berry proposed a definition of *adjustment* as a state whereby changes occur in the individual in a direction of increased fit and reduced conflict between the environmental demands and the individual attitudinal and behavioural inclinations (1992: 73). Successful adjustment, therefore, can be characterized as a state of 'homeostasis' whereby an individual maintains a balanced psychological state which results in effective functioning (Torbiorn, 1982). In the specific context of expatriation, adjustment is conceptualized as the degree of fit between the expatriate manager and the new environment in both work and non-work domains. Such a fit is marked by reduced conflict and stress and increased effectiveness.

Dimensions of adjustment

In the operationalization of expatriate adjustment and effectiveness, several criteria have been identified by Feldman and Thomas (1991: 277): performance at the expected level of quality and quantity, endurance until the end of the assignment, ability to develop constructive relations with the members of the new society, moderate level of stress to function effectively, and positive attitudes towards work. Taken together, these criteria of successful adjustment encompass both work and non-work domains of expatriation experience. While indicators such as adequate performance, completed duration of the assignment and positive work attitudes are relevant to work-related adjustment, participation in the social life, satisfaction with living conditions and psychological well-being are relevant to adjustment in the general cultural milieu.

The multidimensionality of the adjustment process has been discussed in both acculturation and expatriation literatures. In the acculturation framework, three facets of adjustment are identified: psychological adjustment, socio-cultural adjustment (Searle and Ward, 1990), and work adjustment (task effectiveness) (Aycan and Berry, 1996; Hawes and Kealey, 1981). In the expatriation literature, Black and Stephens (1989) identified three facets of adjustment: adjustment to work, adjustment to interacting with host nationals and adjustment to the general environment. These aspects are conceptually similar to work adjustment, socio-cultural adjustment and psychological adjustment, respectively. In order to be consistent with the general acculturation literature, the present model will utilize the concepts of psychological, socio-cultural and work adjustment.

In the present framework, *psychological adjustment* is evaluated in terms of maintaining good mental health or psychological well-being. It is marked by a feeling of satisfaction with different aspect of life, and a feeling of relative satisfaction with comparison to others in the reference groups in both the country of origin and the host society. *Socio-cultural adjustment* refers to one's progress in becoming fully effective

in the society, and the ability to handle problems in non-work situations. Socio-cultural adaptation also includes engaging in positive interpersonal relations with the members of the host society. Finally, *work adjustment* includes demonstration of behaviours that result in effective accomplishment of one's required task, and expression of positive attitudes towards the new work role (Aycan and Berry, 1996; Dawis & Lofquist, 1984).

Work adjustment of expatriates is characterized by both good performance and positive attitudes towards the new work role. One important aspect of such attitudes is the commitment to the local unit as it has a direct influence on intent to stay. Organizational commitment is viewed as a strong belief in organizational goals and values, and a desire to remain a member of the organization (Mowday, Porter and Steers, 1982).

Recent research (e.g., Dunham, Grube and Castaneda, 1994; Meyer and Allen, 1991) conceptualized commitment as comprised of three components: affective, continuance and normative. Affective commitment refers to the degree of emotional attachment to and support for organizational goals and values. Continuance commitment is experienced under the circumstances where there is an awareness regarding the cost associated with leaving the company. In this case, commitment is related to the perception of a necessity to continue working for the organization. Finally, normative commitment is associated with strong feelings of obligation to remain with the organization.
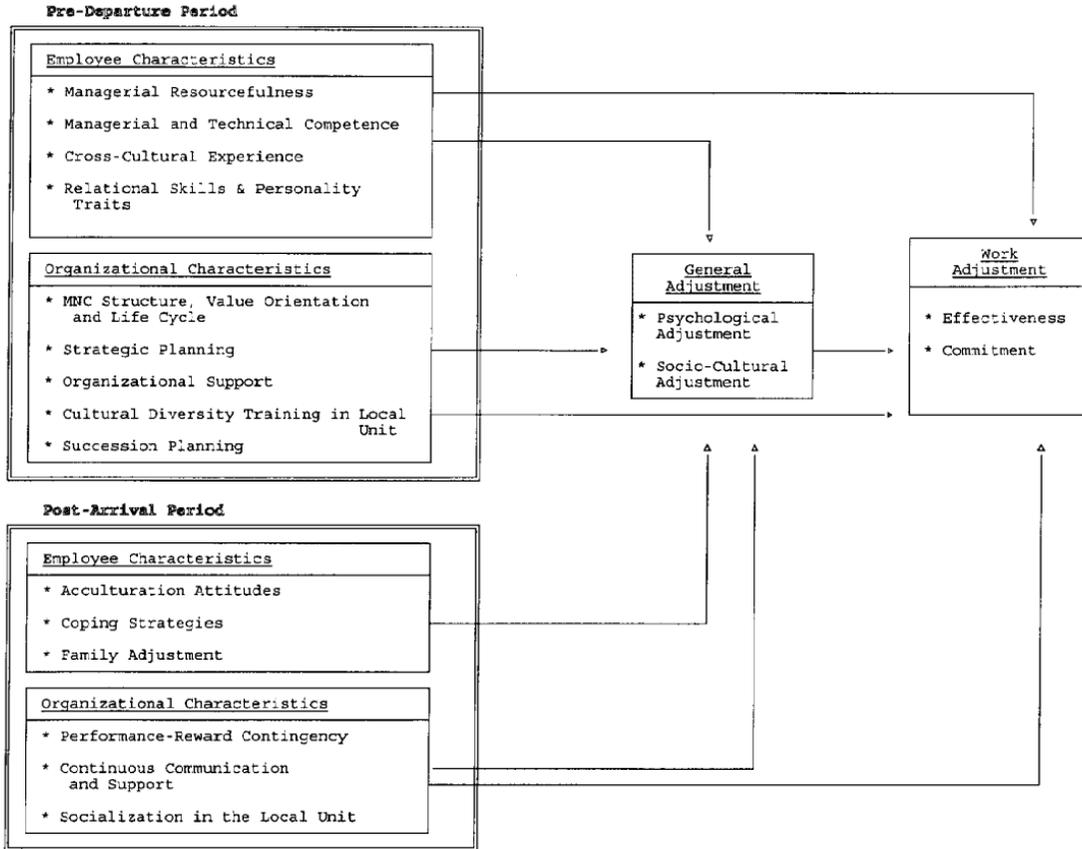
All three forms of commitment are considered to be critical in predicting success in overseas assignments. International assignments are usually perceived as a career advancement in which a considerable investment by the firm, including repatriate compensation plans, career pathing, cross-cultural training and spousal assistance programmes is involved. According to the social exchange theory (Homans, 1958),the need to reciprocate such investments is likely to increase the feelings of obligation to stay in the job and perform adequately. Support provided by both the parent company and the local unit (e.g., organizational socialization, training, social and logistic support) are likely to lead to a perception that the expatriate's well-being is of concern, which, in turn, fosters the affective commitment.

During expatriation, commitment to the local unit, as opposed to the parent company, is emphasized in the present model for several reasons. First, the physical proximity principle (Porter, Lawler and Hackman, 1975) suggests that proximal elements of the work environment such as organizational goals and values should exert a significant influence on employee attitudes and behaviour, and create a psychological identification with it. Second, no matter how committed an expatriate feels towards the parent company, a lack of commitment to the local unit is expected to decrease the likelihood of stay.

Relationship among facets of adjustment

Empirical studies (e.g., Black and Gregersen, 1991; Gregersen and Black, 1990) provided evidence for the interrelationship among the three components of adjustment, but causal relationships among them have not been examined. The present model predicts that general adjustment, which comprises psychological and socio-cultural adjustment, is the most immediate antecedent of work adjustment (Figure 1).

In almost every context, it is much easier to accomplish the required tasks if one feels good and gains acceptance and assistance from others (Moghaddam, Taylor and Wright,

Pre-Departure Period

Employee Characteristics

* Managerial Resourcefulness

* Managerial and Technical Competence

* Cross-Cultural Experience

* Relational Skills & Personality
  Traits

Organizational Characteristics

* MNC Structure, Value Orientation
  and Life Cycle

* Strategic Planning

* Organizational Support

* Cultural Diversity Training in Local
                                   Unit

* Succession Planning

General
Adjustment

* Psychological
  Adjustment

* Socio-Cultural
  Adjustment

Work
Adjustment

* Effectiveness

* Commitment

Post-Arrival Period

Employee Characteristics

* Acculturation Attitudes

* Coping Strategies

* Family Adjustment

Organizational Characteristics

* Performance-Reward Contingency

* Continuous Communication
  and Support

* Socialization in the Local Unit

Figure 1 *A conceptual model of expatriate adjustment*

1993). Searle and Ward (1990), for example, showed that psychological adjustment was the best predictor of task-effectiveness for sojourners. A number of other writers have pointed out that the manager's inability to adopt to a different physical and cultural environment inhibited work performance and resulted in failure (Kealey, 1989; Stening and Hammer, 1992; Tung, 1987).

Bhagat (1983) criticized organizational literature for ignoring the influence of stressful life events on individual behaviour in organizations. He asserted that a reduced effectiveness in the work-place was a function of stressful life events:

> concern for problems in personal life might assume a crucial role and might take precedence over job-related concerns. Naturally, such tendencies would adversely affect one's involvement with the job. . . . In contrast . . . as an individual experiences a limited amount of stress in the personal domain, it could motivate him or her to cope and compensate by attempting to overperform in the domain of work role.
>
> (Bhagat, 1983: 665)

Similarly, findings by Vicino and Bass (1978) demonstrated that 'life-stability', operationalized as low stress and high social adjustment, significantly correlated with managerial success. The adverse impact of stressful adjustment problems on job performance and commitment within the *repatriation* context has been discussed (e.g., Forster, 1994), but interestingly, no such causal links were explored for the *expatriation* period.

In cross-cultural transitions, changes an individual is exposed to are likely to be stressful. In some cases adjustment to certain changes in living conditions can be so demanding that they influence the intention to stay. Gregersen and Black (1990), for example, found that adjustment to the general environment, and to the interaction with host nationals, was the primary determinant of intent to stay, whereas adjustment to work did not influence this decision. Therefore, psychological adjustment marked by a low level of stress and a high level of satisfaction with living conditions is likely to increase commitment and performance.

Interaction with host nationals and participation in social life (socio-cultural adjustment) are also expected to enhance effectiveness and commitment for two main reasons. First, the more one interacts with others in the new culture, the more one learns about the appropriate behaviour (through observation and feedback from others) in work and non-work contexts. This will increase interpersonal effectiveness (by reducing conflicts) on the job, and hence increase job performance. Second, acquaintance with others in the new culture enhances the underst1nding of and identification with the host nationals which, in turn, increase commitment.

> *Proposition 1*: Psychological and socio-cultural adjustment are the most immediate predictors of work adjustment as manifested by increased effectiveness and commitment.

Antecedents of adjustment

Factors leading to successful psychological, socio-cultural and work adjustments have been examined within a two-by-two framework: employee and organizational characteristics in pre-departure and post-arrival periods.

Pre-departure period: employee characteristics

This section examines the employee characteristics which are expected to generate successful adjustment outcomes. These characteristics include managerial resourcefulness, technical and managerial competence, previous cross-cultural experience and relational skills and personality traits. These factors are especially relevant in the selection stage.

Managerial resourcefulness   The concept of managerial resourcefulness was proposed by Kanungo and Misra (1992) to identify competencies and resources that lead to successful adjustment in work and personal domains of a manager's life. Basic components of managerial resourcefulness are 'competencies' which refer to mental capabilities (inner resources that managers possess) that facilitate successful adjustment. Competencies are considered to be necessary complements to technical skills. They help managers to decide what, when and how to utilize such skills to engage in cognitive self-controlling adaptive responses (Kanungo and Misra, 1992: 1323). Accordingly, a resourceful manager is characterized as a person who self-regulates his/ her behaviour to cope successfully with stressful circumstances.

Managerial resourcefulness as a construct has never been utilized in the expatriation literature. In this paper, it is considered to be one of the most critical employee characteristics that predicts success in overseas assignments because of its emphasis on mental strengths and tendencies that help coping with challenging life events. There are three components of managerial resourcefulness that are conceptualized (Kanungo and Misra, 1992) and operationalized (Kanungo and Menon, 1995): affective, intellectual and action-oriented competencies. Affective competencies involve controlling aggressive and regressive tendencies, reducing withdrawal and excessive excitement, developing problem orientation and displaying proactive involvement, enthusiasm, interest and commitment to meeting challenges in life.

Intellectual competencies involve goal analyses through analytical thinking, diagnostic information generation to assess the situation, planning for alternative courses of action and self-reflection for strengthening self-efficacy belief. Finally, action-oriented competencies are comprised of attention to details, persistence to pursuits, concern for time-frame, interpersonal sensitivity and empathy, and non-defensive and supportive posture to gain others' acceptance. Affective, intellectual and action-oriented competencies as indicators of managerial resourcefulness are expected to facilitate coping with stress and increase expatriate effectiveness in both work and non-work contexts.

> *Proposition 2*: Affective, intellectual and action-oriented competencies as components of managerial resourcefulness increase the likelihood of expatriate overseas adjustment to both work and non-work contexts.

Technical and managerial competence   Another factor that is expected to reinforce adjustment is an expatriate's technical and managerial competence (e.g., Bardo and Bardo, 1980; Hawes and Kealey, 1981). Technical and managerial expertise are likely to foster adjustment for three reasons. First, expertise helps to reduce the uncertainties associated with the new job role which, in turn, helps to reduce stress and facilitate adjustment. Second, competence in one's job increases the confidence in one's self. Self-confidence is likely to generate courage to execute new behaviour, and, hence,

facilitate culture learning (cf. Bandura, 1977). Finally, the trust and co-operation of co-workers in the local unit are likely to increase if the expatriate manager demonstrates his/her competence in the assigned job (Zeira and Banai, 1985).

Proposition 3: The expatriate manager's technical and managerial competence leads to increased work adjustment.

Cross-cultural experience Previous cross-cultural experience has been shown to be related to successful adjustment (Church, 1982; Searle and Ward, 1990). Expatriates themselves report that having previous cross-cultural experiences helps them in the process of adjustment in subsequent assignments (Brewster, 1991). It has also been associated with commitment to the local work unit during expatriation (Gregersen and Black, 1992). Social learning theory (Bandura, 1977) predicts that an individual, during previous cross-cultural experiences, acquires skills to cope with uncertainties through observation, modelling and reinforcement. Previous experiences also help in the formulation of realistic expectations as to the degree of difficulty one should expect. Realistic expectations, as well as skills to cope with ambiguities, facilitate adjustment (Searle and Ward, 1990; Weissman and Furnham, 1987).

The relationship between previous cross-cultural experience and adjustment, however, is moderated by two factors: the time gap between the previous and the present international assignment, and the nature of the previous assignment (Black, Gregersen and Mendenhall, 1992). Previous assignments in the immediate past and in similar cultural and work contexts prepare managers for the upcoming post better than those which took place a long time ago and in substantially different cultural and work settings.

The basic rationale behind the value of the prevouis cross-cultural experience is that it increases familiarity with international settings in general, and with a specific cultural setting in particular. In this respect, the ethnic and cultural background of a manager should be taken into consideration during the selection phase. For example, those who are born and raised in the culture of the assignment (or a very similar one) have a better chance of adjusting and being accepted by the locals (Mamman, 1995).

Proposition 4a: Previous cross-cultural experiences facilitate expatriate overall adjustment to the extent that they occurred in similar work and cultural contexts and in the near past.
Proposition 4b: Expatriate managers who are assigned to cultural contexts similar to their own cultural background will adjust better than those who are assigned to completely unfamiliar cultural contexts.

Relational skills and personality traits Relational skills that facilitate coping with stress are assets for cross-cultural assignments. Two important relational skills that are associated with coping are cultural flexibility and conflict resolution skills. Cultural flexibility generally refers to the ability to orient oneself to a new cultural setting. One aspect of cultural flexibility includes the ability to substitute for the activities enjoyed in the home country those in the new culture (Black, 1990; David, 1976).

Cultural flexibility also includes a lack of prejudice with respect to other's opinions and behaviours, and a willingness to change one's own behavioural patterns whenever needed (Torbiorn, 1982). Hawes and Kealey (1981) and Ruben and Kealey (1979), for example, found that the most important set of behaviours related to success in

international assignments were being flexible, sensitive, respectful and non-judge-mental. Trying to understand the new culture without being judgemental not only reduces stress, but also facilitates cultural learning and adjustment.

Conflict-resolution skills enable one to cope with stress in interpersonal conflicts. They include an understanding of others' viewpoints and an effort to relate to them, initiating a collaborative approach and increasing mutual respect. Similar to cultural flexibility, conflict resolution is also expected to facilitate cultural learning and reduce stress. Abe and Wiseman (1983) and Hawes and Kealey (1981) demonstrated a significant relationship between conflict resolution skills and adjustment. Black (1990) also found significant relations of both conflict resolution and cultural flexibility with all three aspects of adjustment in expatriates.

> *Proposition 5a*: Cultural flexibility and conflict-resolution skills facilitate psycho-logical, socio-cultural and work adjustment.

In recent years, there has been an upsurge of interest in personality traits as predictors of job behaviour (e.g., Adler, 1996; Buss, 1989; Costa, 1996). Similarly, in the international domain, application of personality test to predict adjustment and performance is considered to be fruitful (e.g., Caligiuri, 1996; Deller, 1997; Ones and Viswesvaran, 1997). Among various personality traits, extraversion (e.g., Benson, 1978; Gardner, 1962; Mendenhall and Oddou, 1988; Parker and McEvoy, 1993; Searle and Ward, 1990), agreeableness (e.g., Black, 1990) and openness to new experiences (e.g., Abe and Wiseman, 1983; Hammer, Gudykunst and Wiseman, 1978) are found to be the most important predictors of cross-cultural adjustment. Individuals possessing such personality traits are more likely to initiate and maintain meaningful interactions with host nationals, show interest in learning their values and treat such new experiences with respect and empathy.

> *Proposition 5b*: Extraversion, agreeableness and openness are personality traits that facilitate general and work adjustment.

Pre-departure period: organizational characteristics

In this section, responsibilities of both the parent company and the local unit in preparing the expatriate for the assignment will be discussed. MNCs' international structure, value orientation, life-cycle, strategic planning, and organizational support will be examined in relation to the parent-company preparation, whereas cultural-diversity training and planning for succession will be addressed in relation to the local unit preparation.

MNCs' structure, value orientation and life-cycle   It has been demonstrated that MNCs' structure of international operations (Rosenzweig and Singh, 1991), head-quarter's value orientation (Schuler, Dowling and DeCieri, 1993) and organizational life-cycle (Milliman, Von Glinow and Nathan, 1991) have an impact on its international human resource management practices and policies. In the expatriation context these factors are expected to determine not only the strategic goal of the assignment but also the extent to which cultural-sensitivity training is provided and the expatriate's assignment is treated as a career-development opportunity.

On the basis of its structure, value orientation and stage in the organizational life-cycle, an MNC decides how much control should be exerted on the local unit and how

much sensitivity to the local environment is needed (Schuler, Dowling and DeCieri, 1993; Rosenzweig and Singh, 1991). For example, an MNC requires the local unit to mirror the heaquarters with minimal autonomy and high centralization if their structure of international operation is based on an 'international division design' (Punnett and Ricks, 1992), if headquarter's value orientation is towards 'ethnocentricism' (Perlmutter and Heenan, 1979), and/or the organizational life-cycle is at the first stage of 'organizational initiation'. Consequently, the expatriate manager is expected to control the local operation and transfer the company culture and policies overseas. Because demands of the local socio-cultural, political, legal and economic environment are paid little attention to by these companies, cultural-sensitivity training is expected to be minimally emphasized in the preparation of the expatriate. inadequate cultural training leads to more adjustment problems upon arrival to the new culture. Similarly, the expatriate's assignment is not likely to be treated as a part of his/her long-term career planning by such organizations (Milliman *et al.*, 1991) which, in turn, decreases the expatriate's performance, satisfaction and intent to stay (Feldman and Thomas, 1991; Stroh, 1995).

In contrast, if the international structure is more towards a 'multinational design' with a 'polycentric' value orientation, and/or if the company is at the 'strategic integration' stage, sensitivity to local demands is increased and each local unit is given autonomy within a decentralized operation (Dowling and Schuler, 1990). In this context, the mission of the expatriate is mainly to provide support, training and developmental opportunities for local-unit employees who dominate the operation with optimum sensitivity to local market needs. A true integration and co-operation with the local work-force is expected from the expatriate. Therefore, cultural sensitivity training is recognized as an integral part of the preparation phase. Milliman *et al.* (1991) assert that such organizations are also more concerned with expatriates' long-term career issues and cross-cultural training needs which, eventually, will lead to increased effectiveness and commitment.

Proposition 6a: The parent organization's international structure, value orientation towards globalization and life-cycle influence the expatriate's work adjustment in such a way that MNCs with high sensitivity towards the demands of the local environment will provide their expatriates with better cultural training programmes which will facilitate their adjustment.

Proposition 6b: MNCs that consider international experiences as strategic advantages for both the company and the expatriate will treat the expatriate's assignment as an important step in his/her career-pathing which will, in turn, increase the expatriate's commitment and performance.

Strategic planning   In most cases, expatriate selection and training is done without proper planning (Mendenhall, Dunbar and Oddou, 1992). However, there needs to be a congruence between the strategic goal of the assignment and the criteria of selection, training and performance appraisal. As mentioned in the previous section, depending on the structure, value orientation and life-cycle, there may be several reasons for companies to send a manager to an overseas assignment (Black *et al.*, 1992): to provide technical expertise where local manpower is not available, to provide training to the local work-force, to co-ordinate and control the local operation, to ensure information flow and exchange between the parent firm and the local unit, to provide developmental opportunities for managers and so on.

Depending on the strategic goal(s) of the assignment, different criteria and techniques have to be utilized in selection, training and performance appraisal. For example, if the mission is to facilitate information flow and exchange between the headquarter and the local unit, communication skills are most critical for selection and performance appraisal. For such assignments, highly rigorous training (Black *et al*., 1992) is required with tools such as simulations and practices, and advanced language training, being utilized to enhance communication and interpersonal relations skills.

Strategic planning in the pre-departure period is very important to reduce un-certainties about the assignment and to increase the fit between the expatriate manager and the new work environment. Moreover, detailed planning implies that the company anticipates the potential problems of adjustment and tries to minimize them for the expatriate. This leads to a perception that the company is dependable and caring towards its employees. This perception strengthens the commitment and willingness to succeed.

During the strategic planning, the parent company should consult with the local unit. Local managers know the demands of the new cultural and work context the best, and are most helpful in determining relevant criteria and tools for selection, training and performance evaluation. Agreement between the parent and local company becomes more critical in the later stages of expatriation, especially during the performance evaluation. The expatriate's prior knowledge of appraisal criteria and a consensus reached by the two companies in the pre-departure period reduce inconsistencies, conflicts and stress, and increase work effectiveness and commitment.

> *Proposition 7a*: Strategic planning which includes a fit between the strategic goal(s) of the assignment and criteria for selection, training and performance appraisal yields better work-adjustment outcomes.
> *Proposition 7b*: Consulting with the local unit about the training needs and tools and appraisal criteria of the expatriate will decrease pre-departure uncertainties and increase the expatriate's efficiency and commitment upon arrival.

An integral part of strategic planning is the job design. Among other job characteristics, job discretion and job clarity are the most frequently discussed in expatriate adjustment literature. Studies have considered job characteristics to play a significant role *upon* arrival in the new work setting (e.g., Black and Gregersen, 1991; Black, Mendenhall and Oddou, 1991). This model, however, considers clear commu-nication of the new job role *prior to* arrival in the new work unit as being more critical, because it reduces pre-departure uncertainties.

Lack of clarification of the new work role not only increases the uncertainties upon arrival, but also leads to misunderstandings between the parent company and the expatriate in the later stages of the assignment. Torbiorn addressed the 'role shock' experienced by expatriates: 'unclear and confusing expectations, the inadequate information and conflicting demands imposed upon [an expatriate] will all make it difficult for him/her to know how to act and may interfere with his her happiness in the job' (1992: 37). Prior knowledge of what is expected from the expatriate manager is likely to reduce stress and uncertainties, and increase the sense of responsibility and commitment (Fisher and Gitelson, 1983; Gregersen, 1992).

In addition to role clarity, role discretion gives the manager flexibility on the job (Black *et al*., 1992). It also enhances the sense of responsibility and commitment. Moreover, role discretion brings a certain amount of flexibility into the relationship

between the expatriate and the new work environment. Nicholson (1984) argues that greater role discretion results in better adjustment, because it allows individuals to adapt their work setting to themselves, rather than changing themselves to fit into the new environment. Accordingly, greater role discretion makes it easier for individuals to utilize successful behaviour patterns which, in turn, reduces uncertainty in the new situation and facilitates adjustment (Black, 1987).

It is important, however, to note a caveat regarding job discretion. This model suggests that there is a curvilinear relationship between job clarity and job discretion. Work performance and effectiveness will be optimum if job clarity is at a high and job discretion is at a *moderate* level. Too much job discretion reduces job clarity and effectiveness as it tends to increase uncertainties. Therefore, the model proposes that in order to facilitate work adjustment, a company should design an expatriate's new job in such way that it brings maximum clarity and moderate flexibility to the new work role.

Proposition 7c: An expatriate's job designed to include a high level of role clarity and a moderate level of role discretion predicts better work adjustment.

Organizational support   Another factor that facilitate expatriate adjustment is the social and logistic support provided by the organization before the move. Expatriation is a stressful event, because it involves substantial changes in social and professional life. Housing, schooling, medical insurance, legal requirements for entry (e.g., visa, work permit), spousal employment, work transfer are a few of the issues to be taken care of prior to the entry. Organizational assistance reduces the time the expatriate has to spend on these issues and facilitates adjustment to the new work setting. The more support and assistance provided by the company, the less stress and uncertainties experienced by the expatriate manager (e.g., Munton and Forster, 1993).

Organizational support also enhances the commitment. Guzzo, Noonan and Elron (1994) found that expatriates felt more committed to the operation when they perceived organizational support at an expected level. Guzzo *et al*. explained their findings by using Schein's (1980) notion of 'psychological contract'. Psychological contracts are expectations held by employees about the nature of the exchange between themselves and the employers. Perceived violation of the psychological contract resulted in expatriates' dissatisfaction and retention failure (Guzzo *et al*., 1994). In sum, social and logistic support received during the pre-departure period facilitates an expatriate's work and general adjustment.

Proposition 8: Logistic and social support provided by the parent company in the pre-departure period facilitates the expatriate's overall adjustment.

Cultural-diversity training in the local unit   In the expatriation research, preparation of the host-country work-force has not received adequate attention (Vance and Ring, 1994). The local unit has an equal responsibility to become informed about the cultural and personal characteristics of the expatriate, as the expatriate has the responsibility to learn about the new culture and work setting.

Cultural-diversity training received by the local work-force is expected to enhance expatriate adjustment for several reasons. First, according to attribution theory (Heider, 1958) individuals determine the cause of a piece of behaviour on the basis of their

evaluations of the motive and intention for that behaviour. The accuracy of such attributions increases as we acquire more information about that person's characteristics (Bell *et al.*, 1976). Therefore, the more we know about a person, the less error we make in evaluating his or her behaviour. This, in turn, decreases the interpersonal conflicts and misunderstandings, and increases the accuracy and efficiency of communication (expatriate cultural-awareness training is important in the pre-departure period for the same reason).

Second, a better understanding of an expatriate's cultural background and personal characteristics is likely to facilitate interpersonal attraction and increase the likelihood of social support and co-operation for the expatriate from the local employees. This will increase the expatriate's job effectiveness and commitment to the local unit.

Third, cultural-diversity training in the local unit should ideally include a confrontation with the stereotypes and biases the work-force may have about the cultural/racial background and/or gender of the expatriate. Being aware of such biases and learning the ways to minimize them will create a more culturally tolerant and conscious environment that increases the effectiveness and commitment of the expatriate (Cox, 1994). This training is important, because the slightest possibility of a bias prevents companies from sending, especially, women and members of the minority groups to overseas assignments (Davison and Punnett, 1995). Therefore, cultural training in the local unit will also give competent managers of under-represented groups an equal opportunity to get overseas assignments.

> *Proposition 9*: Cultural-diversity training in the local unit, that raises awareness of and sensitivity towards an expatriate's cultural and personal characteristics, will facilitate collaboration between the expatriate and local workers which, in turn, increase the expatriate's effectiveness and commitment.

Planning for succession in the local unit Both the parent company and the local unit have an equal responsibility to ensure that the work transition from the expatriate predecessor manager to his or her successor is a smooth one (Brewster, 1991). However, in this model, succession planning is considered to be a part of the local unit preparation, as the transition actually takes place in the local unit.

According to Selmer and Luk (1995: 91), a proper succession 'ensures continuity and the accumulation of experience in the foreign operation'. As a part of the preparation process in the pre-arrival period, the local unit should make arrangements to facilitate the information exchange between the previous expatriate and his/her successor (Selmer, 1995). If there has been no previous overseas assignment to the local unit, a mentor who will provide assistance to the expatriate manager during the transition period should be trained to assist the expatriate. In addition to cultural-awareness training which prepares the local unit to provide *social support* to the expatriate, succession planning prepares the local unit to provide *job-related assistance* to the expatriate. As such, it will reduce uncertainties associated with the job, and facilitate work adjustment.

> *Proposition 10*: An overlap period between the previous and present expatriates enables the expatriate to make a smooth work-role transition and facilitates work adjustment.

ISSUE 1

Is it considered to be of
value to maintain own cultural
identity and characteristics?

	YES	NO
ISSUE 2 ... YES	Integration	Assimilation
Is it considered to be of value to maintain relationships with members of the host society? ... NO	Separation	Marginalization

Source: Berry (1980)

Figure 2 *Model of acculturation attitudes*

Post-arrival period: employee characteristics

In this section, acculturation attitudes, family adjustment and coping strategies will be discussed as predictors of adjustment in the post-arrival period.

Acculturation attitudes Not only the MNC's but also the expatriate's attitude towards how to integrate into the new culture and the local unit could influence his/her adjustment. In the acculturation literature, acculturation attitudes are considered to be important for a successful adjustment. The model of acculturation attitudes (Berry, 1980) addresses two critical issues (Figure 2).

The first issue is whether or not an individual values maintaining his/her own cultural characteristics. The second issue is whether or not maintaining relationships with members of the host society is considered to be of value. According to the model, if the response to the first issue is 'no' and to the second issue is 'yes', 'assimilation' occurs. It is an option when an acculturating individual does not wish to maintain his/her cultural characteristics but seeks relations with groups in the larger society. 'Separation', as opposed to assimilation, is preferred when there is a strong urge to maintain one's own culture and identity and not to interact with groups in the larger society. 'Integration' is the option when there is an interest in interacting with others, while conserving the cultural identity. Finally, 'marginalization' occurs if an individual is interested in neither maintaining the culture of origin nor interacting with others in the larger society. Among the four acculturation attitudes, integration was found to predict good mental health and low stress, whereas marginalization predicts poor mental health and high stress. Separation and assimilation were found to be in-between in predicting mental health and stress (see Berry *et al*., 1987, for a review).

Application of acculturation attitudes is evident in organizational behaviour literature (e.g., Korabik, 1994; Nahavandi and Malekzadeh, 1988), but the framework has never been utilized in studies of expatriate adjustment. The present model predicts that an integrationist attitude in both work and social life will yield the best adjustment outcomes for two main reasons. First, upon arrival, expatriates may find the new culture very different from their own. In order to function efficiently in the social and work contexts, it may be necessary to adopt the norms and values of the new culture. Willingness to interact with host nationals becomes very important at this point.

According to the social learning theory (Bandura, 1977), interaction with others is an important source of information regarding the appropriate behaviour and its consequences, which will increase an individual's efficiency in daily contact with others.

Second, by interacting with others in the new society and by trying to learn their way of doing things, the expatriate proves to the locals that s/he values and appreciates the new culture and is putting effort into learning their ways. This will please the host nationals who will display greater acceptance and co-operation towards the expatriate. If, on the contrary, the expatriate demonstrates an attitude of separation and imposes his/her own values on others, this will create tension, conflict and stress in interpersonal relations which, eventually, will adversely affect his/her effectiveness. An atmosphere of mutual respect, acceptance, co-operation and understanding created by an integrationist attitude increases the likelihood of work effectiveness and commitment to the local unit.

Researchers, including Mendenhall and Oddou (1985) and Black (1987, 1990), pointed out that the willingness to communicate with host nationals was an important determinant of all aspects of expatriate adjustment. On the other hand, limiting one's interactions to the 'expatriate ghetto' (i.e., exhibiting a separatist attitude) was considered to be undesirable since it creates a barrier to understanding host nationals (Adler, 1991; Kealey, 1989). Confirming the importance of integration, Lee and Larwood (1983) found that competent expatriates were the ones who deliberately sought an accommodation with the host country while maintaining their own cultural values.

In light of these studies, the model predicts better adjustment if an expatriate prefers integration over separation, assimilation and marginalization in his/her approach towards others in the work and social settings.

> *Proposition 11*: An integrationist attitude displayed in the work and social contexts facilitates expatriate work and general adjustment.

Family adjustment   Adjustment of family members is one of the most frequently cited antecedent factors for expatriate adjustment (e.g., Black, 1987; Black & Stephens, 1989; Black & Gregersen, 1991; Torbiorn, 1982; Tung, 1981). Problems of adjustment to a new school environment for children and employment problems for the spouse may be some major sources of stress for the expatriate. Those managers whose family members have adjustment difficulties are most likely to feel responsible for their unhappiness. This is expected to elevate stress. On the other hand, well-adjusted families provide social support which plays a buffer role against stress and facilitates general adjustment.

Family adjustment is also expected to have an impact on expatriate work adjustment. If a spouse or a family member is experiencing difficulty in making cross-cultural adjustment, performance and commitment may be adversely influenced as a result of high level of stress and discontent (Bhagat, 1983; Naumann, 1992).

> *Proposition 12*: Family adjustment will have a positive impact on expatriate's psychological, socio-cultural and work adjustment.

Coping strategies   Coping strategies are important tools that facilitate adjustment. Coping is defined as 'constantly changing cognitive and behavioral efforts to manage

specific external and/or internal demands' (Lazarus and Folkman, 1984: 141). The concept of coping is particularly important for expatriates, because they are confronted with problems related not only to living in a foreign country but also to work transfer.

Coping strategies have been identified in three major categories by Lazarus and Folkman (1984): problem-focused (e.g., work long hours), emotion-focused (e.g., psychological withdrawal) and search for social support. Diaz-Guerrero (1979) proposed an additional active–passive dimension to coping style where preference for an active style reflects a tendency to alter the situation whereas preference for a passive style reflects self-modification. Coping strategies have the main goal of reducing the emotional impact of stress through actions and thoughts (Lazarus and Folkman, 1984).

Feldman and Thomas (1991) found that active coping strategies, including changing the work environment and seeking out information and training, are positively related to success of expatriate assignments, whereas psychological withdrawal was related to adjustment problems.

Proposition 13: Active and social-support-seeking-oriented coping strategies yield better adjustment outcomes than passive, problem- and emotion-focused coping strategies.

Post-arrival period: organizational characteristics

In this last section, performance-reward contingency, continuous communication and support, and organizational socialization in the local unit will be discussed as predictors of adjustment.

Performance-reward contingency In expatriation literature, the role of performance appraisal and reward management are often overlooked. Poor performance appraisals and inappropriate reward allocation are likely to reduce motivation, effectiveness and commitment.

As previously discussed, the definition of the expatriate's job and criteria for performance evaluation have to be clarified in the strategic planning stage. These are the first two steps in performance management. Monitoring, appraisal and rewarding are further steps of performance management that become especially critical during the assignment.

A multi-rater multi-dimensional approach is expected to yield a more reliable performance appraisal (Black *et al*., 1992; Gregersen, Black and Hite, 1995). For example, an expatriate's general adjustment, interpersonal relational skills, communication competencies and ability to work with the local team can be best assessed by local unit managers and co-workers, whereas the quality and quantity of output and effectiveness in information exchange between the headquarter and the local unit are better evaluated by the parent company. Also, applying different criteria at different stages of adjustment was recommended as it is found to be related to high success for European expatriate managers (Tung, 1987): for example, companies may consider making allowance for performance that is less than adequate and put more emphasis on general adjustment in evaluating an expatriate's performance in the initial period of the assignment.

Once the performance is properly appraised, the next challenging task is rewarding the expatriate. It is not unusual to find disappointed expatriates who get less than what

they hoped for (Black *et al*., 1992; Kerr, 1975). The important point in reward allocation is that a reward (either intrinsic or extrinsic) motivates the expatriate only when it is salient, valued and contingent upon performance (Kanungo and Hartwick, 1987). The 'performance-reward contingency approach' was developed from value-expectancy theory (Vroom, 1964) which suggests that an employee is motivated to the extent that s/he perceives his or her effort leading to a desired performance, and that the performance results in valued outcomes (monetary or non-monetary).

In sum, an expatriate's motivation to succeed increases if s/he believes that his or her performance is appraised adequately, and that s/he receives rewards that are valued (e.g., a free visit to home country). A proper performance appraisal is expected to increase effectiveness by providing accurate feedback. Performance-reward contingency is likely to enhance both performance and commitment, as it increases the perception of equity and justice.

Proposition 14a: An adequate (multi-rater and multi-dimensional) performance appraisal predicts better work adjustment.
Proposition 14b: A valued reward which is contingent upon performance yields better work adjustment.

Continuous communication and assistance   One of the most persistent themes in the expatriation literature is the 'out of sight, out of mind' phenomenon. A majority of companies assume that they have fulfilled their responsibilities to the expatriate by providing training and support in the pre-departure period. Once the expatriate is overseas, there is an expectation that the expatriate will manage the rest by himself or herself. However, there may be a number of unforeseen matters after the move that require company assistance (Black *et al*., 1991). Support during the assignment will not only accelerate the adjustment but also strengthen the commitment to the parent company and its overseas operation.

Continuous communication is also important to reduce the anxiety associated with repatriation. The new position in the company after the return is one of the major sources of stress for expatriates which negatively influences performance (Feldman and Thomas, 1991). Communication with the expatriate, especially with respect to his or her position upon repatriation, helps reduce the anxiety associated with reintegration into the home company work-force, and elevates work effectiveness and commitment.

European and Japanese multinationals appear to provide a more comprehensive support system which includes a mechanism of ''parenting'' or ''mentoring'' whereby an expatriate is paired to a superior in corporate headquarters who takes the role of sponsor. The sponsor . . . appraises the expatriate regularly about the situation at home, and has the responsibility of finding a position for the expatriate upon his return' (Tung, 1987: 121). Expatriates who feel confident about company support are likely to adjust better than those who experience uncertainties and stress about their future.

Proposition 15: Continuous communication and assistance provided by the parent company during the assignment decrease repatriation-related anxiety and increase work adjustment.

Organizational socialization in the local unit   In the expatriate literature, anticipatory socialization by the parent company, that is, obtaining advance information about the new context, has been discussed (e.g., Black *et al*., 1991; Feldman, 1981), but the

impact of socialization in the local unit on an expatriate's work adjustment has not been given enough attention (Black *et al*.(1991) examined this variable in relation to role innovation).

Organizational socialization has been defined as 'the fashion in which an individual is taught and learns what behaviours and perspectives are customary and desirable within the work setting as what others are not' (Van Maanen and Schein, 1979: 211). From a social learning perspective, socialization that takes place in the new organizational culture will facilitate cultural understanding and, subsequently, adjustment and work-effectiveness. Through the process of mentoring or modelling during the orientation process, expatriates not only learn appropriate skills, but also come into contact with host national and develop a mutual trust and understanding that will facilitate adjustment. Commitment (Wiener, 1982) and person–organizational culture fit (Chatman, 1989) are found to be the functions of organizational socialization following entry. Therefore, it is expected that orientation programmes provided by the local unit will facilitate work-related adjustment.

There are six major socialization strategies identified by Van Maanen and Schein (1979). Among them, collective, serial, investiture and informal tactics are expected to yield better adjustment outcomes. Collective socialization involves sharing common experiences with other expatriates, as opposed to socializing the new expatriate in isolation from others. Going through the socialization process with other expatriates is helpful in reducing the stress of adjustment (e.g., knowing that others also go through the same experience). Also, information exchange among expatriates facilitates culture learning and adjustment.

Serial socialization strategy involves assignment of an experienced member in the local unit to act as a mentor to the expatriate. Informal socialization focuses on integrating the newcomer into the work-force by treating him/her as a natural member of the unit. Finally, through investiture socialization it is communicated that the knowledge and experiences of the expatriates are valued among his/her co-workers.

Socialization process which utilizes such tactics is likely to generate mutual trust and co-operation at work and will foster commitment to local unit. It will also be helpful in reducing stress and facilitate culture learning and work effectiveness.

Proposition 16: Socialization process in the local unit where collective, serial, informal and investiture tactics are utilized enhances work adjustment.

Conclusions and implications

The model proposed in this paper identified factors that are expected to account for a substantial amount of variance in expatriate adjustment. Adjustment was conceptualized as the degree of fit between the expatriate and his/her environment in a direction of reduced stress and increased effectiveness. To capture the entirety of the process, adjustment was identified as a multidimensional phenomenon comprising psychological (psychological well-being and satisfaction with different aspect of the new life), socio-cultural (effective functioning in social and cultural life) and work (effectiveness on job and positive work attitudes) adjustment. Psychological and socio-cultural adjustment were proposed as the most immediate predictors of work adjustment. It was argued that expatriates will be effective in and committed to their new job to the extent that they experience low stress and high integration into the new cultural milieu.

One of the most critical arguments in this paper was that a successful adjustment was a function of not only the expatriate manager's personal characteristics, but also of

organizational (both parent and local) support and preparation for expatriation. Therefore, an expatriate's failure (premature return or inadequate performance) should not be attributed solely to his/her inability to adjust. The adequacy of the planning and preparation process in parent and local companies requires a close examination, as it is an equally important source of failure.

There are a number of issues discussed in this paper that provide directions for future research. First, organizational commitment is an important feature associated with work adjustment. The ways in which different facets of commitment (i.e., affective, normative, continuance) are related to expatriate adjustment is worth exploring. Second, the role of managerial resourcefulness deserves a closer examination in the expatriation literature. Affective, intellectual and action-oriented competencies that make a manager resourceful seem to be critical, especially for expatriate managers, because such competencies are particularly important for coping with ambiguous, challenging and stressful circumstances. Third, characteristics of previous cross-cultural experiences (e.g., when and where it took place, and what the position was) are important moderators that need to be taken into consideration in future research. Fourth, the ways in which role discretion interacts with role clarity to determine the level of job performance is to be investigated. Fifth, host-country work-force preparation should be construed as an issue of managing cultural diversity. As such, insights provided by cultural diversity management literature could be fruitful in understanding the best practices that lead the local work-force to work efficiently with the expatriate manager.

Finally, the parent organization's approach towards expatriation is asserted as one of the major determinants of overseas success. An MNC's international structure, orientation towards globalization and stage in the organizational life-cycle are expected to determine the strategic goal of the assignment and the role of the expatriate. In turn, these will have an impact on the value attached to an expatriate's international experience and the quality of the pre-departure training. A congruence among organizational determinants (i.e., structure, value orientation and stage in life-cycle), strategic goal(s) of the assignment and the operational planning (selection, training and performance appraisal) increases the likelihood of expatriate success. Future research, therefore, should look into the issue of fit in managing expatriates from the organizational development perspective.

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