UNIVERSITY OF LJUBLJANA

FACULTY OF ECONOMICS

MASTER'S THESIS

# THE INFLUENCE OF PRE-DEPARTURE TRAINING ON EXPATRIATE ADJUSTMENT ON NON-STANDARD INTERNATIONAL ASSIGNMENTS: THE MODERATING EFFECT OF SPOUSE ADJUSTMENT

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# INTRODUCTION

A vast majority of multinational organisations have recognised that time when they could operate solely within one specific country or one geographical region has come to an end. Today's extreme dynamics of business environment is increasingly forcing companies to send employees abroad. In order to remain competitive in international arena, multinational organisations are putting enormous emphasis on international human resource management. They have found it crucial to employ expatriates in a number of international assignments, which are becoming indispensable to organisations due to a variety of developmental and functional reasons (Caligiuri, Phillips, Lazarova, Tarique, & Rock, 2001).

These core individuals who are required to effectively perform in cross-national job assignments have collectively become vital for the success of multinational organisations since they fill critical staffing needs in subsidiaries, transfer knowledge and competence between the various units, and manage key projects. Taking into consideration the great importance of their roles and the immense responsibility associated with international assignments, maximising expatriates' cross-cultural effectiveness and adjustment has recently become a significant HR activity (Stahl & Björkman, 2006).

The importance of pre-departure training in preparing expatriates for an international assignment has therefore become increasingly apparent in recent years, and pre-departure training has become perceived as a means of ensuring successful expatriate performance (Dowling & Welch, 2004). In an effort to attain global competitiveness, multinational organisations increasingly recognise that they must take necessary steps to promote the expatriate success and to avert failure (Bennett, Aston, & Colquhoun, 2000). In the survey report conducted by Brookfield Global Relocation Services (2013), this positive trend is clearly noticeable since 83 % of respondent multinational organisations indicated that pre-departure training was available for at least some international assignments.

Given the criticality of international assignments for multinational organisations, it is of prime importance to examine antecedents to expatriate adjustment. First, expatriate maladjustment may cause termination and premature return from international assignment, which may not only generate significant costs for the companies, but may damage company reputation and cause lost reputation or business opportunities as well. Second, failure to complete international assignment may be potentially harmful to an expatriate and host company, and may result in unsatisfying job performance upon repatriation. Finally, an expatriate's failure will most probably have an adverse effect on the decision of consequent managers to accept international posts, which may in turn endanger company position and competitiveness on foreign markets (Aycan, 1997).

The great majority of studies focusing on expatriate adjustment have done so predominantly from the perspective of the expatriate manager. Even though several studies verified that the inability of the expatriate spouse to adjust was an important direct and

indirect determinant of expatriate adjustment and also vital for the success of the international assignment, only few studies have looked at the expatriate adjustment process specifically from the expatriate spouse's point of view. Expatriate spouses have instead been merely placed in the context of non-work factors influencing expatriate adjustment, and the attempts to grasp their experiences connected to international assignment have been minimal (Andreason, 2008).

However, according to Petrovic, Harris and Brewster (2000), 62 % of respondent multinational organisations reported an increase in short-term assignments, and 52 % of them stated that commuter assignments and frequent business travel increased over the last two years, which implies that spouse adjustment to non-standard international assignments is becoming an ever growing challenge for multinational organisations. The same trend was recorded by Brookfield Global Relocation Services (2013), stating that 55 % of short-term assignments were unaccompanied.

As proposed by Shaffer and Harrison (1998), spouse maladjustment is one of the most salient reasons for failed assignments. Therefore, it seems crucial to comprehend more about what constitutes spouse adjustment since the attempts to understand the experiences of spouses have been minimal, which lies in stark contrast to the amount of research that has been accumulated about the expatriate adjustment.

As can be inferred from the previous paragraphs, my master thesis will focus on the influence of pre-departure training on expatriate adjustment on non-standard international assignments with the special emphasis being given to the moderating effect of spouse adjustment. I will first review the existing literature and theoretical findings to be able to develop a research framework that will be empirically tested within the scope of my master thesis later on. The purpose of this master thesis is, therefore, to deepen understanding of the factors affecting expatriate adjustment, to raise awareness of pre-departure training significance, and to contribute to the enhanced training methods and practices in multinational organisations, which can consequently facilitate expatriate success on non-standard international assignments.

By researching the moderating effect of spouse adjustment, I would like to highlight the importance of spouse's pre-departure training and adjustment for expatriate adjustment. The objective of the master thesis is to study the influence of pre-departure training on expatriate adjustment, and to examine the moderating effect of spouse adjustment.

Hence, the thesis is intended to provide an answer to the following research questions:

a) Does pre-departure training influence expatriate adjustment on non-standard international assignments?
b) Does spouse adjustment moderate expatriate adjustment?

The master thesis consists of six chapters, and is systematically divided into two parts, theoretical and empirical one. I will first provide a theoretical framework by briefly

describing the characteristics of non-standard international assignments, and then continue by focusing on pre-departure training. The role and types of pre-departure training that expatriates receive prior to their departure to non-standard international assignment will be presented in detail. The next chapter will present the constructs of expatriate and spouse adjustment. It will first focus on expatriate adjustment by explaining its facets and then continue by presenting the U-curve theory, which importantly adds to the understanding of expatriate adjustment. The second part of this chapter will be devoted to the construct of spouse adjustment, which will be explained by considering theoretical findings that were made by identity theorists. The last part of the chapter will be dedicated to dimensions of spouse adjustment. In the empirical part, I will introduce the conceptual model, develop hypotheses based on the literature review, describe the research procedure, and present the results obtained in the research. I will conclude my master thesis with discussion of the findings gained during the analysis and recommendations for future analysis and enhanced practises for multinational organisations.

# 1 NON-STANDARD INTERNATIONAL ASSIGNMENTS

In the following chapter I am going to define the construct of non-standard international assignments, which is of paramount importance for further comprehension of this master thesis.

## 1.1 Types of non-standard international assignments

Globalisation is becoming a permanent feature in today's business operations, and the number of employees embarking on non-standard international assignments is increasing (Johnson, Kristof-Brown, Van Vianen, De Pater, & Klein, 2003). Within the strategic context of international human resource management employees are relocated to non-standard international assignments for varying lengths of time depending on the purpose of the relocation and the nature of the task to be performed. Most of the research into assignment topic has focused on traditional long-term assignment type, mainly because it forms the bulk of international assignments (Dowling & Welch, 2004). However, multinational organisations are now gradually using non-standard international assignments to meet business objectives and to reduce assignment costs (Balbona, Sartorio, & Woods, 2006). Mayerhofer, Müller and Schmidt (2010) explain that non-standard international assignments embody short-term, unaccompanied and business travel assignments by people who still hold their job at home office but have an international work-load, while their place of residence remains unchanged. Even though the category is rather broad in nature, all types of non-standard international assignments possess two chief characteristics – frequent alternation between different work locations, including different national and regional cultural contexts, and a flexible schedule even across several time zones with few daily routines.

Welch, Worm and Fenwick (2003) define short-term assignments as transfers abroad that last longer than a business trip, but shorter than the traditional long-term assignment.

Dowling and Welch (2004) additionally emphasize that short-term assignments are usually intended for troubleshooting, project supervision or simply represent a stopgap measure until a more permanent arrangement can be found.

Welch et al. (2003) further define rotational assignments as an assignment type that covers commuting from a home country to the place of work in another country for a short predefined timeframe that is followed by a holiday in the home country.

Dowling and Welch (2004) describe commuter assignments as special arrangements where the employee commutes from the home country on a weekly or bi-weekly basis to the work location in another country, while the family remains at home. Commuter assignments have been on rise in recent years, and may be ideal for plugging a temporary skill gap or to support an employee whose family cannot or is not willing to relocate. However, they generally do not support an employee with the advantages of adapting to a new culture (Hauser & Taylor, 2010).

International business travellers are employees for whom business travel to foreign markets represents an essential component of their work. In spite of advances in electronic communication, such as e-mail and video conferencing, the need for international business travel has remained largely unaffected. Group and regional meetings, staff briefing sessions, joint training sessions, product development meetings and solving technical problems are just some of the activities that require travelling from one country location to another. On the external side, international business travellers frequently undertake activities related to stakeholders in various international markets such as negotiating and closing deals, sales activities, attending trade fairs or maintaining the important relationships with global stakeholders. The frequency and volume of personal visits to international destinations vary according to circumstances and market dynamics (Welch, Welch, & Worm, 2007).

## 1.2 Business drivers of non-standard international assignments

Multinational organisations have traditionally used long-term expatriate assignments as the main method of performing their international operations. Lately, however, they are increasingly paying attention to the cost-effectiveness and appropriateness of such expatriations in a fast-paced global environment. Changes in the profiles of international managers and growing challenges in maintaining work-life balance have led multinational organisations to start proffering non-standard international assignments over long-term ones (Harris, 2004).

Hauser and Taylor (2010) suggest further reasons for multinational organisations to shift away from traditional expatriate assignments. Project-based assignments are the main reason for the increase in non-standard international assignments, followed by knowledge transfer. Training and developmental opportunities for early career and/or high potential employees have encouraged an extensive number of global business operations. The next most important drivers are skill gap, the limited nature of a project, start-up support,

technical support, market exploration, dual-career issues and family considerations. Due to the changing drivers for non-standard international assignments it is now becoming prevalent for multinational organisations to have multiple short-term assignments that need to be administered instead of fewer long-term ones. Figure 1 graphically shows business drivers of non-standard international assignments.

*Figure 1*. Most important business drivers of non-standard international assignments
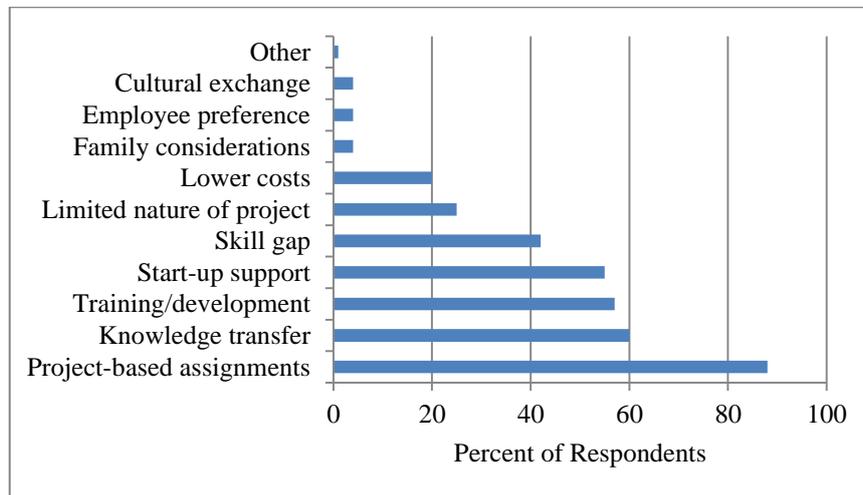


Source: J. Hauser & J. Taylor, *Short Term International Assignments*, 2010, p. 1.

## 1.3 Advantages and disadvantages of non-standard international assignments

In comparison to traditional expatriate assignments, non-standard international assignments appear to offer several advantages to multinational organisations that are seeking to improve their global business operations. They offer flexibility in purpose, location, skills, and timing, in contrast to long-term assignments that involve long-term commitments in one location. However, non-standard international assignments offer similar intrinsic benefits to employees concerned, ranging from high-level of challenge and autonomy to permitting employees to escape the monotony of daily work routines. Arguably, non-standard international assignments may facilitate a global understanding of business operations and the development of global competence (Mayerhofer, Hartmann, & Herbert, 2004). According to Petrovic et al. (2000), non-standard international assignments are financially less complex to administer since there are no relocation or repatriation costs involved and no complex compensation packages needed. Decisions on compensation packages are thus not complicated by taxation issues and lifestyle comparisons. By using non-standard international assignments, the mobility barriers such as dual career issues for expatriate spouses are eliminated. Many stresses arising from relocation and repatriation issues are decreased as well.

Nevertheless, new issues are related to non-standard international assignments that multinational organisations must surmount. Non-standard international assignments disrupt regular social, health and cultural activities of the individual. Social and family life is forced to fit with travel schedule and job demands, which may cause great disturbances in

social integration (Mayerhofer et al., 2004). Work-life imbalance and family separation pose a considerable challenge to those involved in any type of non-standard international assignment and are cited as a possible mobility barrier. Some of the multinational organisations are thus finding it hard to encourage employees to accept the non-standard international assignment. The requirements for cross-cultural adaptation needed to successfully perform this type of assignments are only intermittent. Even more, cultural contexts change rapidly; therefore difficulties in effectively dealing with cultural differences are rather frequent. In addition, preventing burnout and travel fatigue are common problems that multinational organisations are coping with (Petrovic et al., 2000). It is also notable that it is difficult for multinational organisations to establish consistent policy for non-standard international assignments. They usually have several assignment policies and, as a result, multiple programs to administer (Hauser & Taylor, 2010). Table 1 summarizes advantages and disadvantages of non-standard international assignments that were described in this chapter.

Table 1. Advantages and disadvantages of non-standard international assignments

| Advantages | Disadvantages |
|---|---|
| applicable to many types of project or skill based needs | shorter duration limits immersion in a new culture |
| support career and personal growth experience objectives | costs may increase if sequential or multiple assignments are needed |
| variability in duration and objectives | administratively more challenging: same amount to do in a shorter time frame |
| lower assignment costs and financially less complex to administer | work-life imbalance |
| repatriation and relocation challenges lessened | family separation may be difficult |
| more feasible to some employees due to family considerations | no consistency in assignment policy |

Source: *based on the work of authors presented in the chapter.*

## 2 PRE-DEPARTURE TRAINING

### 2.1 The role of pre-departure training

The increased dynamics of international business results in the increased number of expatriates, and intercultural competence is definitely one of the crucial factors in the context of effective international assignments (Gertsen, 1990). Multinational organisations are increasingly gaining awareness that a great majority of international assignments tend to fail because of a lack of intercultural skills that enable expatriates to adjust to the new environment (Hurn, 2007). In fact, most managers who are assigned abroad have a proven domestic record. The areas in which pre-departure training is greatly required are those pertaining to the local customs, language facility and socio-political environment (Baliga & Baker, 1985).

Several authors have recognised that a well-designed pre-departure training can be extremely beneficial with assisting individuals to more easily adjust to the new culture. While Earley (1997, p. 686) points out that "a major objective of intercultural training is to help people cope with unexpected events in a new culture", Gertsen (1990, p. 353) notes that "successful intercultural training should provide participants with conceptual tools to handle their experiences in a foreign culture later on." Selmer, Torbiörn and de Leon (1998, p. 835), in addition, advocate that "cross-cultural training aims to increase the applicability of new behaviours which are more appropriate to the host culture."

Briscoe, Schuler and Claus (2009) claim that expatriates should have the capacity to anticipate not only the firm's operating conditions, but also to predict socio-political developments and their implications for the firm. The preparation of the selected expatriate prior to departure to non-standard international assignment is therefore at least as crucial to their successful performance abroad as selecting the right candidate in the very beginning.

Pre-departure training should help expatriates to: a) become aware that behaviours vary across countries and cultures, and learn to carefully observe them; b) build a cognitive cultural map and understand values, norms and behaviours of the local people; and c) practice the behaviours they will need in order to be successful in their new post. The authors further suggest that pre-departure training should comprehensively focus on the following competencies:

- **cognitive competency**, relating to knowledge and facts about the host county;
- **behavioural competency**, relating to the ability to adapt to diverse conditions, to show cross-cultural communication skills, to learn the appropriate business etiquette, and to successfully cope with stress;
- **performance competency**, relating to the ability to perform well on the non-standard international assignment in the host country. This competency includes the appropriate technical or managerial skills, learning on the job, and the ability to develop support network for accomplishing the task at hand.

In the interest of enhancing success of non-standard international assignments, Bennet et al. (2000) put forth specifics about what the effects of a successful pre-departure training should be. They contend that pre-departure training objectives should be designed to help expatriates: a) manage change in terms of personal and professional transition; b) manage cultural differences; and c) manage professional responsibilities within the host country. Dowling and Welch (2004) propose that, at a minimum, expatriate pre-departure training should consist of cross-cultural training, language training, preliminary visits and practical assistance on daily issues in order to enable a smooth transition to a foreign location.

In order to reach the objectives of pre-departure training and improve its effectiveness, Tarique and Caligiuri (in Harzing & Van Ruysseveldt, 2003) propose to follow a five-step process as a general strategy for designing effective pre-departure training programme:

- **Identify the type of international assignment for which pre-departure training is needed**. Since non-standard international assignments vary in nature, pre-departure training will differ according to the goals required for the successful completion of each type of the assignment. Black and Mendenhall (1989) have expressed the opinion that the content of the pre-departure training for the needs of non-standard international assignments should be more focused and topic-specific than for the expatriates who are assigned to long-term assignments;
- **Determine the specific pre-departure training needs.** This involves conducting a need analysis across three levels: a) the organisational level; b) the individual level; and c) the assignment level;
- **Establish pre-departure training goals and measures.** This involves determining short-term and long-term goals for the training and expatriate assignment outcomes as well as measures for determining pre-departure training effectiveness;
- **Develop and deliver the pre-departure training programme in accordance with the training goals.** This involves determining the specific instructional content needed in order to achieve the stated goals and the methods to deliver the instructional content, and the sequencing of the training sessions;
- **Evaluate the pre-departure training programme effectiveness**, which is normally measured in terms of the benefits an expatriate receives from pre-departure training.

## 2.2 Types of pre-departure training

Gudykunst, Guzley and Hammer (in Stahl & Björkman, 2006) divide the methods available to deliver pre-departure training into four categories based on learning approach and training content: a) didactic culture general; b) didactic culture specific; c) experiential culture general; and d) experiential culture specific.

Didactic culture general methods provide general information on culture to expatriates and include lectures, seminars, reading material, discussions, videotapes and culture-general assimilators. Didactic culture specific methods, on the contrary, aim at making expatriates

competent in a particular culture. Methods belonging to this category include area studies, videotapes, case studies and orientation briefings.

The experiential training methods stress skills acquisition and highlight the assumption that individuals learn best from their own experiences. While experiential culture general methods help expatriates experience the impact of cultural differences on their behaviour by utilising such methods as immersion programmes or intensive workshops, experiential culture specific methods help expatriates experience and learn from interactions with host country nationals. This method generally comprises role-playing, field experiences, in-country cultural coaching and language training. Presented methods for designing pre-departure training are graphically depicted in Figure 2.

*Figure 2*. Classification of cross-cultural training methods
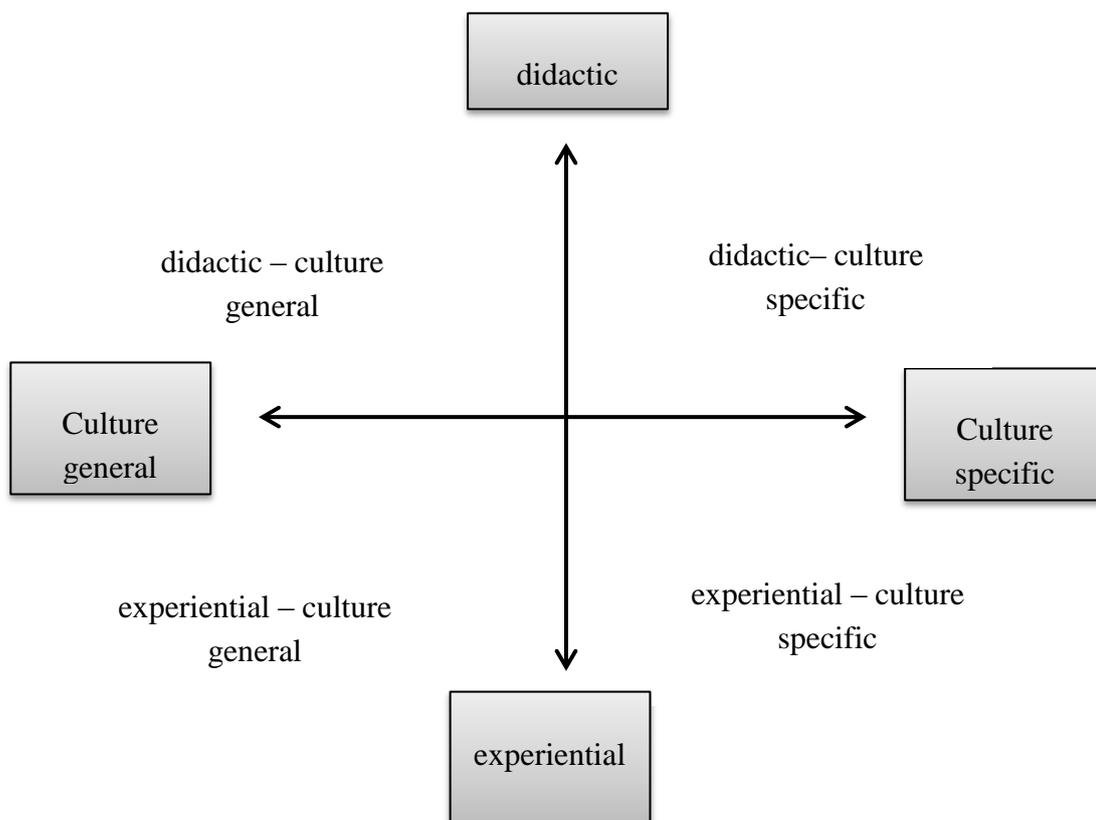


Source: J.F. Puck, M.G. Kittler & C. Wright, *Re-assessing the impact of pre-departure cross-cultural training on expatriate adjustment*, 2008, p. 2185.

Another stream of research into this topic brings forth pre-departure training rigor as an important determinant in designing cross-cultural training programme. Black and Mendenhall (1989) essentially define training rigor as the level of cognitive involvement, participation and effort of the trainee to learn the required concepts. They have stated that rigor is also associated with the length of time dedicated to the training programme. Thus, all other things being equal, a training programme that would involve a total of 25 hours

over five days would be less rigorous than a programme spanning 100 total hours over three weeks.

Three dimensions are generally relevant for determining the appropriate degree of training rigor: a) cultural toughness; b) communication toughness; and c) job toughness. These dimensions are briefly explained in the next paragraphs.

Some cultures are more difficult to adapt to than others. The tougher the new culture is to adapt to, the more rigorous training the expatriate should receive prior to the departure in order to perform effectively in the host country. The next step in assessing the cultural toughness is the previous overseas experience of the specific expatriate. The more experience the expatriate has had with the specific culture in the past, the less rigorous training programme the person is expected to need to successfully cope with the challenges in the host culture.

The degree of interaction between the expatriate and the local population needed to successfully perform work tasks further determines the level of rigor needed. The more interaction is required, the higher the level of expected communication toughness. As the intensity of interaction increases, the need for training rigor increases proportionally. This means that if interaction is face-to-face, two-way or informal, the training required should be more rigorous than in the opposite situation. The extent of communication toughness can thus be determined by examining the extent to which the non-standard international assignment requires communicating with host country nationals.

The third important factor determining the level of rigor is the job novelty and its related tasks. The more novel and tougher the tasks on the non-standard international assignment, the more assistance and support the expatriate will need through rigorous pre-departure training to be able to produce the necessary behaviour to be effective (Stroh, Black, Mendenhall, & Gregersen, 2005).

Moreover, Tung (1981) identified five categories of pre-departure training, which are presented here in the ascending order of rigor:

- **Area studies programmes** include environmental briefing and cultural orientation programmes. Their main goal is to provide the expatriate with the information about the politics, economics, history, geography, climate, and cultural institutions of the host country the person has been assigned to. Since cultural differences between any two countries are countless, it is almost impossible that area studies programmes could pass on to the expatriate all the knowledge that would be required over the course of the non-standard international assignment.
- **Culture assimilator** consists of a series of brief episodes depicting a cross-cultural encounter. These encounters are believed to be critical to the interaction situations between members of various cultural groups. The technique, however, is primarily designed for expatriates who had to be assigned abroad on a short notice. In

assignments that require an extensive interaction with host country nationals, this technique should be supplemented by the more rigorous training programs.

- **Language training** enables expatriates to learn the language of a host country to which they are assigned. As Baliga and Baker (1985) additionally explain, good host language skills can improve the expatriate's access to information regarding the host country's economy, government and market; it can also enhance the expatriate's entry into the social environment in the host country.
- **Sensitivity training** focuses on developing an emotional flexibility within the expatriates so they accept that unfamiliar modes of behaviour and values are also valid ways of doing things in the host culture. This training technique thus facilitates respect between groups of people of different gender, races or religions.
- **Field experiences** involve sending the expatriates to the host country where they are exposed to the situations they might encounter during the non-standard international assignment. They may undergo the same emotional stress that might be expected while living and working in the host country. Field experiences do not need to involve months or several weeks. A full week of experience would suffice to introduce expatriates to the business environment in the host country, and helps assure more informed pre-departure preparation.

The five categories of training programmes presented above vary in terms of medium of instruction, information content, and time and resources required. They should supplement each other and, depending on the assignment type and the country of assignment, the expatriate should be exposed to one or several of these training techniques.

Tung (1981) proposes that multinational organisations should consider several factors when designing pre-departure training programme. The first step in assessing the choice of the appropriate training technique is the identification of the degree of interaction between the expatriate and host country nationals that is required by the job. In job positions involving extensive contact with local population and an understanding of the local values the training content should focus on cross-cultural skill development as well as on new job tasks. Moreover, if dissimilarity between the home and host culture is large, the level of training rigor should be moderate to high. If contact with the local population is minimal and the degree of dissimilarity between the home and the host culture is low, then the training content should focus on job-related issues and the level of training rigor necessary for the expatriate's effectiveness in the non-standard international assignment should be relatively low. Since different assignments call for different degree of cross-cultural skills, personnel administrators should locate the job in question along this continuum, and determine the appropriate training technique that would be suitable for the specific expatriate.

In her study of American, European and Japanese multinationals, Tung (1982) again highlighted the importance of the systematic analysis of variations in task and environmental factors with the intention to prescribe the best type of pre-departure training programme. These factors, as has already been mentioned, are: a) the differences in degree

of contact required with the host culture; b) varying duration of stay in the host culture; and c) the varying degrees of differences between home and host cultures.

Even though Tung's model names criteria for determining pre-departure training methods, it does not specify which training methods to use or what constitutes more or less rigorous training. Tung (1998) hence revisited her early work and reported that her original recommendations still hold true, but with some provisions.

She stresses that it is important for the pre-departure training to take on a lifelong dimension as opposed to a brief programme with an area-specific focus only. Foreign language proficiency is critical to the expatriate success on the non-standard international assignment. On non-standard international assignments, an emphasis should be put on communication competence so that the expatriate becomes bicultural and bilingual, which makes a transition between home and host cultures smoother. While in her early work Tung explained that the primary goal of sensitivity training is to raise awareness of cross-cultural differences, now she points out that the objective of such training should rather be to value and celebrate diversity among cultures. By taking part in sensitivity training, expatriates should consequently be encouraged to combine the better elements from both the home and host cultures to facilitate effective performance. Last but not least, an important component of pre-departure training programme is to provide the expatriate with a realistic preview of what to expect in the non-standard international assignment.

Mendenhall and Oddou (1986) and Mendenhall, Dunbar and Oddou (1987) made further recommendations for improving pre-departure training on the basis of the acculturation profiles of expatriates that will be elaborated more deeply in the next chapter. These are: a) self-oriented dimension; b) others-oriented dimension; and c) perceptual dimension. The authors support the idea that multinational organisations must encompass all of the dimensions of acculturation by utilising interviews, psychological tests or assessment centres, and not simply looking at technical or managerial skills. Knowledge of how expatriates rate on acculturation dimension would allow multinational organisations to enhance pre-departure training programmes.

According to Mendenhall and Oddou (1986), before expatriates are sent to the non-standard international assignment it is vital for them that: a) they receive an evaluation of their current skills that are crucial to their adjustment abroad; b) they receive training in the skills where they are most weak; c) they receive training programme that encompasses all the skills necessary to adjust successfully to the non-standard international assignment; d) they receive training programme that is appropriate to the necessary degree of integration into the host country; and e) training programme is facilitated by well-qualified trainers who possess a sound knowledge of the acculturation process.

Thus, expatriates should have access to the evaluation of their acculturation profiles so they can, with the assistance of cross-cultural trainers, pay attention to the areas they are weak in, and improve these skills prior to their departure to prevent negative experiences when abroad.

Based on Landis and Brislin's (1983) typology, Mendenhall et al. (1987) constructed a new model that incorporates three dimensions: a) training methods; b) level of training rigor; and c) duration of the training relative to the degree of interaction and culture novelty. They classified cross-cultural training programmes into three types: a) the information-giving approach that involves the acquisition of information or skills from a lecture-type orientation; b) affective approach that involves the acquisition of information and skills through techniques that raise affective responses to cultural insights; and c) the immersion approach that involves techniques providing realistic simulations to the expatriate. A comprehensive training programme would, nevertheless, employ all these approaches to cross-cultural skill acquisition.

Moreover, a mediating factor to this model proposed by Mendenhall et al. (1987) would be the length of non-standard international assignment and the degree of integration within the host culture that is necessary for the successful completion of the assignment. Degree of integration refers to the level of cultural skills the expatriates need to perform effectively. For example, short-term business negotiations in regions such as Saudi Arabia or China require high levels of cultural fluency in comparison with other regions such as Australia or Canada.

As can be inferred from Table 2, with an increased need for the expatriate to integrate into the host country, the training type should increase in depth from being primarily information-giving in nature to being increasingly affective and immersion-oriented. Also, as degree of integration increases, length of time needed for pre-departure training to be successfully implemented increases as well (Mendenhall & Oddou, 1986).

Table 2. 1. Relationship between degree of integration into the host country and rigor of cross-cultural training, 2. Relationship between length of stay and length of training and training approach

| Length of stay | Length and rigor of training | Cross-cultural training approach |
|---|---|---|
| 1-3 years | 1-2 months/high | Immersion approach: assessment centre field experiences simulations sensitivity training extensive language training |
| 2-12 months | 1-4 weeks/moderate | Affective approach: culture assimilator role playing critical incidents cases stress reduction training moderate language training |
| 1 month or less | less than a week/low | Information-giving approach: area briefings cultural briefings films/books use of interpreters survival-level language training |

Source: M. Mendenhall & G. Oddou, *Acculturation Profiles of Expatriate Managers: Implications for Cross-Cultural Training Programs*, 1986, p. 78.

Later, Black and Mendenhall (1989; 1990) concluded that the model developed by Mendenhall et al. (1987) did not consider the expatriate's new tasks and the new host culture. They, therefore, paid their attention to the former training techniques basing on social learning theory, and recognised that pre-departure training is important, but the

expatriate's willingness and ability to act upon the pre-departure training are crucial as well.

# 3 EXPATRIATE AND SPOUSE ADJUSTMENT

## 3.1 Expatriate adjustment

### 3.1.1 Facets of expatriate adjustment

In the context of expatriate research, expatriate adjustment is generally defined as the degree of a person's fit or psychological comfort and familiarity with various aspects of foreign culture (Black & Stephens, 1989; Black & Gregersen, 1991).

The notion of adjustment can be understood as both a subjective and objective concept. As Black (1988) noted, subjective view of adjustment refers to the degree of comfort the expatriate experiences in the new role and the degree to which a person feels adjusted to the new role requirements. In objective terms, adjustment is the degree to which the expatriate masters the role requirements she or he is faced with in the new environment.

While some authors conceptualise expatriate adjustment as a unitary construct, the vast majority of more recent research posit that it is in fact a multidimensional construct. Although the primary focus of the literature on expatriate adjustment concerns the adaptation of the expatriate to a new country, Pires, Stanton and Ostenfeld (2006) argue that expatriation additionally involves the adaptation to a new social organisation and to a different way of doing things, embodied in a new culture.

By far the most popular conceptualisation of expatriate adjustment among researchers is the framework of Black (1988) and Black and Stephens (1989), who differentiated expatriate adjustment into three facets (in Takeuchi, 2010):

- **General adjustment** that refers to psychological comfort related to the host country general living conditions;
- **Work adjustment** that refers to psychological comfort related to different work values, roles, standards and expectations;
- **Interaction adjustment** that refers to psychological comfort related to different communication styles in the host culture, and to interpersonal relations with host country nationals.

Various factors are believed to have significant impact on expatriate adjustment. These are subdivided into individual, job, organisational and non-work factors.

Research has indicated that certain personal traits and characteristics seem to facilitate expatriate adjustment during the non-standard international assignment. These include: a) motivation to adjust; b) technical or managerial competence; c) social relation skills; d) tolerance for ambiguity or open-mindedness; e) self-confidence; f) reinforcement substitution; and g) met expectations.
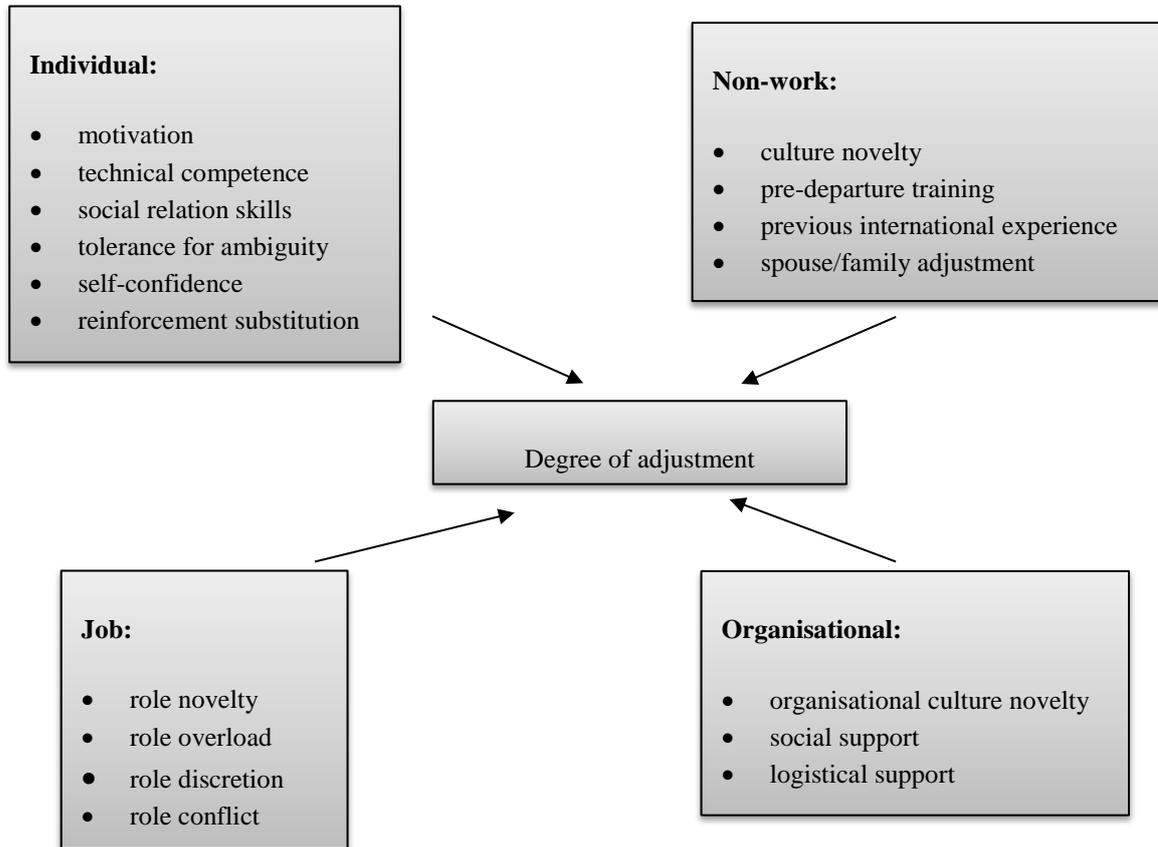
Conversely, several job-related factors have been hypothesised to exert the greatest influence on the facet of work adjustment and tend to increase the uncertainty and unpredictability of the new work role, thus inhibiting the adjustment. These include: a) role novelty; b) role overload; c) role discretion; and d) role conflict. Role novelty implies the difference between the past role and the new one, and increases the degree of uncertainty and unpredictability. Higher role novelty thus suggests lower adjustment to work demands, and more time is needed for the expatriate to reach a level of proficiency. If expatriates have too many demands to execute, they will be less able to respond adequately to all of them. Role overload is, therefore, negatively correlated to work adjustment (Black, 1988). Black, Mendenhall and Oddou (1991) further explain that role discretion allows expatriates to adapt the new work role and setting to themselves rather than adapting themselves to the role. Accordingly, greater role discretion is positively correlated to expatriate adjustment since it enables expatriates to utilize previous behaviour patterns, thus reducing the uncertainty in the novel situation. In contrast, role conflict supposedly increases uncertainty and inhibits adjustment. Conflicting signals about what is expected in a novel cultural setting can generate a high degree of uncertainty since expatriates must first understand the messages and then execute appropriate behaviours accordingly.

Moreover, Black et al. (1991) differentiated organisational factors into: a) organisational culture novelty; b) social support from organisational members; and c) logistical support. The first two of these factors mainly influence work adjustment, whereas logistical support influences general and interaction adjustment. The greater the difference between the organisational culture in the home organisation in comparison to the organisational culture in the host country, the more difficult the expatriate adjustment would be. Social support from organisational members providing expatriates with the information about what is acceptable or unacceptable in the host organisation reduces uncertainty and is positively associated with degree of expatriate adjustment. On the other hand, logistical support regarding schools, transportation, housing or shopping is strongly connected with interaction and general adjustment rather than with work adjustment.

Non-work factors including culture novelty, pre-departure training, previous international experience and spouse/family adjustment are significant predictors of expatriate adjustment as well. Similar to high organisational culture novelty, high culture novelty, defined as the perceived difference between the home and host culture, has the strongest impact on interaction and general adjustment and is negatively associated with expatriate adjustment. It has been proposed by Black et al. (1991) that previous international experience may be an important source of information from which expatriates form accurate expectations regarding the assignment, which in turn reduces uncertainty. Just as previous international experience can facilitate expatriate adjustment so too can pre-departure training. It has the potential of providing expatriates with helpful information for reducing uncertainty related to non-standard international assignment, and for forming accurate expectations about living and working in the host country. Black et al. (1991), moreover, argued that poor family adjustment inhibits the expatriate adjustment.

As further claimed by Harvey (1985), family adjustment, especially that of a spouse, has a profound impact on the expatriate adjustment. In most cases, family/spouse adjustment plays a crucial role in determining whether non-standard international assignment will be successful or not, therefore it is argued to be positively related to expatriate adjustment. Figure 3 offers a summary of the factors affecting expatriate adjustment.

*Figure* 3. Factors affecting expatriate adjustment



**Individual:**

- motivation
- technical competence
- social relation skills
- tolerance for ambiguity
- self-confidence
- reinforcement substitution

**Non-work:**

- culture novelty
- pre-departure training
- previous international experience
- spouse/family adjustment

Degree of adjustment

**Job:**

- role novelty
- role overload
- role discretion
- role conflict

**Organisational:**

- organisational culture novelty
- social support
- logistical support

Source: Black et al., *Toward a Comprehensive Model of International Adjustment: An Integration of Multiple Theoretical Perspectives,* 1991, p. 296.

In relation to the factors believed to affect expatriate adjustment that were proposed by Black et al. (1991), Mendenhall and Oddou (1985) and Mendenhall and Oddou (1986) identified four further dimensions that emerged as components of expatriate adjustment. These are: a) the self-oriented dimension; b) the others-oriented dimension; c) the perceptual dimension; and d) the cultural-toughness dimension.

The self-oriented dimension refers to activities and attributes that serve to strengthen the expatriate's self-esteem, self-confidence, and mental hygiene. An expatriate with a healthy self-oriented dimension is able to replace activities that bring pleasure in the home culture with similar yet different activities in the host culture. Also, expatriates with a strong self-oriented dimension are able to consistently use specific stress reduction techniques in order to reduce the pressures arising from a non-standard international assignment. They are also

self-confident about their technical competence to accomplish the task overseas. These behavioural factors allow expatriates to feel secure in the host country.

The others-oriented dimension comprises activities and attributes that enhance the expatriate's ability to effectively interact with host nationals. The factors of relationship development and willingness to communicate form this dimension. Expatriates who desire to affiliate with and establish close relationships with host nationals are more likely to integrate themselves into the host culture and more effectively satisfy their basic needs for social interaction. Language and communication skills are a useful help toward expatriate adjustment too. They, in general, seem to be related to the expatriate's willingness to use the host nationals' language, confidence in interacting with others, and desire to understand and learn from their host national counterparts.

Furthermore, the perceptual dimension reflects the expertise the expatriate possesses in accurately understanding why host nationals behave the way they do. The ability to make correct assumptions about the reasons of host nationals' behaviour allows the expatriate to predict how they will behave in the future, thus reducing uncertainty in interpersonal relationships. A well-adjusted expatriate tends to be open-minded, non-judgemental and non-evaluative in his or her worldview when interpreting the behaviour of host nationals, and has a high tolerance for ambiguity.

The last component, cultural-toughness dimension, corresponds with the dimension of culture novelty identified by Black et al. (1991), and implies that some cultures might be tougher to adapt to than others. Therefore, the country of assignment significantly influences how well the expatriate adjusts to the non-standard international assignment.

Another conceptualisation of expatriate adjustment that is extensively used in cross-cultural adjustment research was developed by Searle and Ward (1990). While acknowledging the need for the assessment of job productivity and task performance, they suggest that expatriate adjustment can be broadly divided into two distinct facets: a) psychological; and b) socio-cultural.

Psychological facet refers to psychological and emotional well-being and satisfaction, thus reflecting the affective facet of adjustment, whereas socio-cultural facet relates to the ability to fit in, to acquire culturally-related skills and to negotiate interactive aspects of the host culture, thus reflecting the behavioural facet of adjustment.

Ward and his colleagues (in Ward & Kennedy, 1993) further claim that psychological adjustment can be defined in terms of depression or global mood disturbance, and is therefore affected by personality traits, life changes, and social support. Both locus of control and extraversion have been linked to the feelings of psychological well-being in expatriates. Conceivably, a low incidence of life changes and adequate social support facilitate psychological facet of expatriate adjustment.

On the other hand, research has shown that general cultural knowledge, length of residence in the host country and interaction with host nationals impact on socio-cultural facet of adjustment. Emphasis on cultural learning and similarity or dissimilarity between one's home and host cultures further affect the socio-cultural adjustment.

To sum up, these aspects conceptually correspond to the suggested facets of general and interaction adjustment proposed in the model developed by Black (1988) and Black and Stephens (1989).

Following the research carried out by Ward and colleagues, Aycan (1997) states that psychological adjustment characterised by a low level of stress and a high level of satisfaction with altered living conditions tends to increase task performance and commitment. Interaction with host nationals and participation in social activities are also believed to enhance effectiveness and commitment. The more one interacts with host nationals, the more one is getting acquainted with the appropriate behaviour in both work and non-work domains, which in turn increases overall job performance. Psychological and socio-cultural adjustment is hence the most immediate predictor of work adjustment as marked by increased effectiveness and commitment.

### 3.1.2    The U-curve theory

Several scholars have consistently used the U-curve theory (hereinafter: UCT) to describe the cross-cultural adjustment process experienced by expatriates within a host culture. They argue that expatriate adjustment occurs in four stages often referred to as the U-curve, which relates the time path of an adjustment to a host culture (Gullahorn & Gullahorn, 1963; Torbiorn, 1982; Black & Mendenhall, 1991; Lysgaard, 1995; Usunier, 1998).

Usunier (1998) discovered that difficulties in expatriate adjustment process relate not only to cultural differences, which are frequently very hard to comprehend, but also to a feeling of absence of the familiar habits, behaviours and context. His research of American expatriates in France, nevertheless, supports the UCT, but additionally notices that expatriate adjustment never reaches full assimilation to the host culture.

The expatriate in the novel environment almost automatically behaves in a manner compatible with his or her home culture. When one is deeply engaged in a learning experience of emotional significance, the U-curve appears. The initial excitement over novel environment is replaced by feelings of depression and perhaps even decrement in output as one encounters difficulties, and finally, a feeling of satisfaction and personal growth emerges as one restructures the situation in order to work effectively. An expatriate learns value orientations which provide a framework for successfully evaluating behaviour in interpersonal relations (Gullahorn & Gullahorn, 1963).

This explanation matches the four stages proposed by UCT, which are shown in Figure 4. The first stage, also referred to as the honeymoon stage, occurs during the first weeks after

arrival and is characterised by the expatriate's fascination and excitement about the new culture. The newness of the host culture produces the honeymoon effect. This is followed by a period of disillusionment and frustration once the individual must seriously cope with the reality of everyday life. Hostility toward the host country and host nationals is typical of the second stage since the individual receives the negative feedback regarding his or her behaviour. Culture shock generally appears at the transition between the second and the third stage when the individual has received a great amount of negative feedback from the environment, but has yet a very poor conception as to what appropriate behaviour might be. This eventually turns into the third stage, also known as adjustment stage, which is characterised by a gradual adaptation to the host culture and learning of cultural norms. Besides, the individual develops some proficiency in host language skills. The fourth stage, also known as the mastery stage, is marked by small incremental increases in the individual's ability to function without anxiety in the host culture. The individual can now undertake appropriate behaviour (Black & Mendenhall, 1991; Black, 1988).

*Figure 4.* The U-curve of cross-cultural adjustment

Degree of adjustment
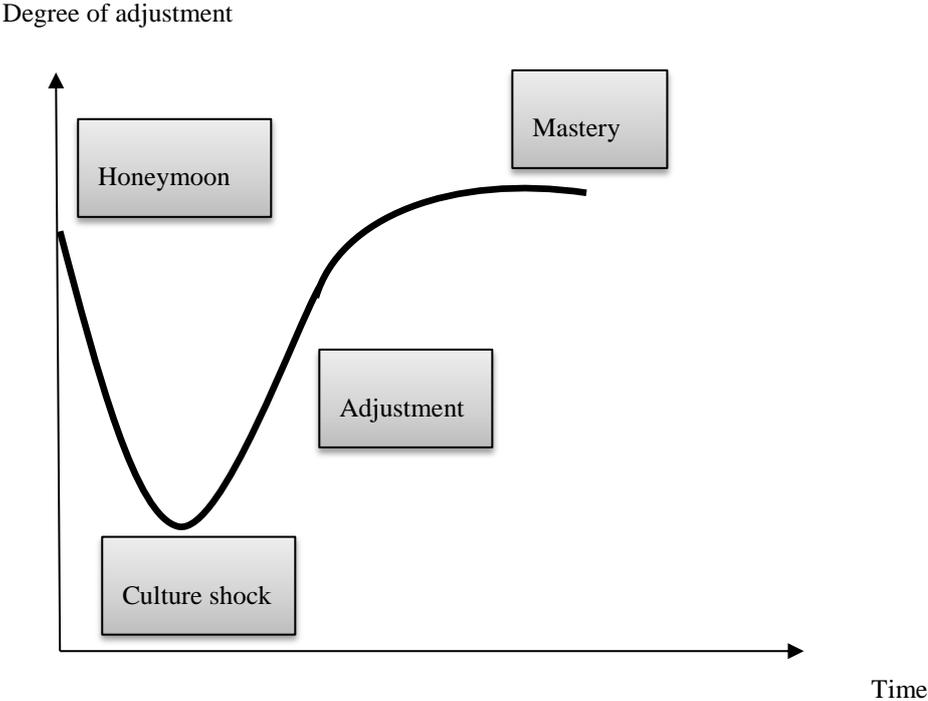


Source: Black et al., *The U-Curve Adjustment Hypothesis Revisited: A Review and Theoretical Framework,* 1991, p. 227.

The same concept applies to non-standard international assignments, but the four phases of the U-curve are not as distinct as for the traditional long-term assignments. Instead, there will be a stronger mixture of positive and negative emotions, of uncertainty and clarity, and of enjoyment and frustration.

However, non-standard international assignments involve the same components of adjusting to the host culture, and similar reactions to personal and management issues occur. Psychologically, expatriates on non-standard international assignments have to cope

with mood swings, understand host country nationals, and establish a social and professional network in order to perform effectively, which corresponds to the UCT explained in the previous paragraphs (Marx, 1999).

Black and Mendenhall (1991) propose that the shift from culture shock to adjustment is a function of the individual's ability and willingness to establish relationships with host nationals and to learn appropriate actions and behaviours that are compatible with the host culture. This, in turn, shortens the time it takes an individual to reach the adjustment stage.

## 3.2 Expatriate spouse adjustment

In order to understand the expatriate spouse adjustment process, we can refer to the Burke's (1991) identity theory, which suggests that disruptions in the identity process occur when individuals are faced with major changes or novel situations. Furthermore, Black and Gregersen (1991) suggest that an expatriate spouse's motivation to make the adjustment plays a crucial role in the spouse adjustment process. They claim that the greater the motivation to make the transition to the new situation, the greater will be the person's efforts to actually adjust. For expatriate's spouses, however, it is proposed that the more favourable opinion about accepting the non-standard international assignment, the greater their level of motivation will be. Consequently, the favourableness of the expatriate spouse's opinion about the partner's non-standard international assignment is believed to be positively related to spouse adjustment.
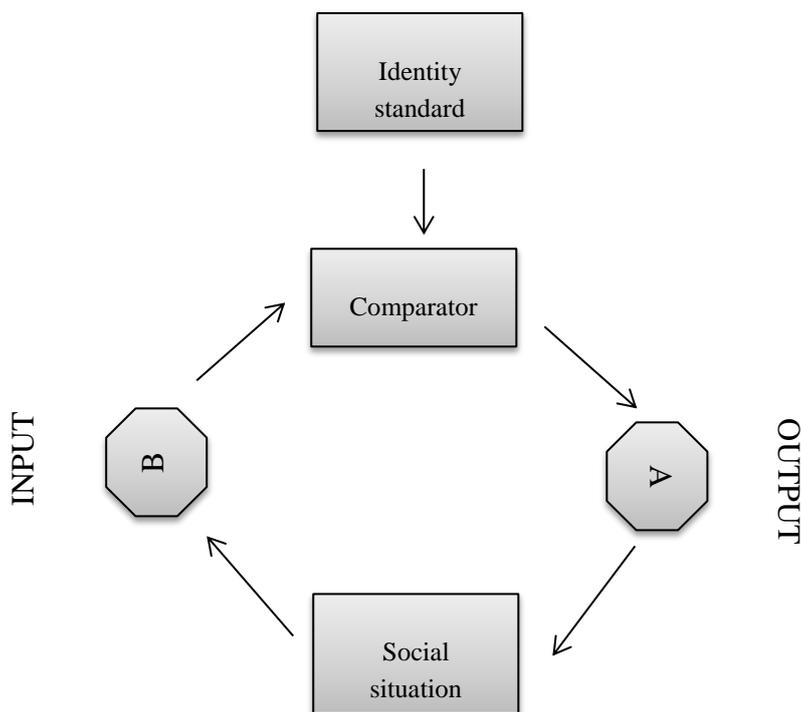
### 3.2.1  Identity theory

Burke and Stets (2009, p. 3) define an identity as "the set of meanings that define who one is when one is an occupant of a particular role in society, a member of a particular group, or claims particular characteristics that identify him or her as a unique person". For example, individuals apply meanings to themselves when they are a student, a spouse or a parent, when they belong to a political party, or are members of a particular group.

People possess multiple identities since they occupy various roles, belong to various groups, and claim various personal characteristics. This set of meanings constitutes what is called an identity standard (Burke, 2004). Identity standard starts to operate when any of multiple identities is activated (Burke, 2006). As stated by Burke and Stets (2009), identity standard functions as a reference with which people compare their perceptions of self-meanings in a specific situation. When an identity is activated in any particular situation, a feedback loop is established. This loop is composed of four components: a) the identity standard or setting; b) an input from the environment or social situation, including one's perceptions of self-relevant meanings; c) a process that compares the perceptual input with the identity standard (a comparator); and d) an output to the environment in form of a meaningful behaviour that is the result of the comparison.

As displayed in Figure 5, the four components of the identity process are interconnected in a cyclic arrangement, and are organised into a control system that operates to control the

input to the system. The identity control system works by modifying output (behaviour) to the social situation with the aim to change the input to match the internal identity standard (Burke, 1991). The behaviour people undertake as a result of the relation between perceived self-meanings in a specific situation and internal self-meanings held in the standard with an attempt to counteract the disturbance cannot be predicted in advance. Instead, the behaviour is thought of as being goal-directed since it aims at establishing the congruence between perceptions and standards (Burke, 2004). Outputs are altered to make the input perceptions of meanings correspond with the meanings held in the identity standard (Burke & Stets, 2009).

*Figure 5*. The identity control system

In terms of the identity theory, the identity standard is scaled in the meanings people hold for themselves in an identity or in a role. For example, a gender identity may be arrayed along dimensions of masculinity/femininity, or a student identity along dimensions of intellectualism, sociability and academic responsibility. These standards within the identity process establish the meaning of one's identity. Identity control system considers the inputs to the identity process to be in the form of perceived meanings of who one is as suggested by the social situation. The comparator then evaluates the degree to which the input and the identity standard correspond (Burke, 1991). When the perceptions match the meanings in the identity standard, people's identities are being verified, and the meaning of behaviour is consistent with the meaning of the identity standard. Consequently, no changes in behaviour are needed.

However, a difference between these is output as an error or a discrepancy signal. In case some discrepancy in the specific social situation causes the perceived self-meanings to deviate from individual's identity standard, the error signal affects the patterns and sequences of one's verbal and nonverbal behaviour. One will start to act so as to resist the discrepancy, and restore the match between perceptions and standards. The discrepancy represents the incongruence between the meanings in the identity standard and the meanings in the situation.

Another element in the identity control system is one's social behaviour, which is understood as a function of the output of the comparator. The undertaken behaviour changes meanings in the situation and alters perceptions, thus reducing any discrepancy. This process of establishing the match between self-perceptions and the identity standard is the process of identity-verification (Burke, 2006).

However, it is important to stress that identity-verification process is operating continuously, which implies that individuals adjust their behaviour to keep perceptions of self-relevant meanings in a particular situation congruent with their identity standards every time an identity is activated. In familiar situations, this adjustment process is efficient and nearly automatic, thus requiring little or no attention. On the other hand, the presence of relatively large disturbances such as any form of non-standard international assignment indicates some type of interruption that has intermitted the continuous congruence between the perceptions and the identity standards (Burke & Stets, 2009).

### 3.2.2 Identity change

Identity theory, in fact, presupposes that identity meanings are constantly changing. Burke and Stets (2009) point out that the rate at which they change is generally very slow under normal conditions, and is only noticeable over longer time periods ranging from weeks or months to even years. For the majority of people, the change is therefore ubiquitous, but gradual and cumulative. Identities generally resist change, and strive for maintaining stability. Resistance to change, however, does not imply that no change whatsoever occurs. The meanings in identity standards do change, thus creating the incongruence between the inputs and one's identity standards that grows beyond the minimal discrepancies that are handled almost automatically. When one's established identity processes fail or are interrupted, incongruence increases and the person feels distress that calls for remediating the problem discrepancy. Any process, event or situation that causes the interruption of the continuously adjusting identity processes can lead to a varying degree of distress. The magnitude of distress experienced by the person concerned is dependent on the severity of the interruption, the degree to which the interrupted identity process is organised, the degree to which the person is committed to the identity, and the importance to the person of an interrupted source of input (Burke, 1991).

Burke (1991) and Burke and Stets (2009) consider four sources of change that lead to feelings of distress: a) changes in the situation; b) identity conflicts; c) identity standard and behaviour conflicts; and d) episodic identities. Since only the first source of change is

relevant for a complete comprehension of spouse adjustment process, it is the only one to be described into greater detail in the next paragraph.

External changes in a situation interrupt the normal, continuous and automatic adjustment process, and generate a discrepancy between the identity-standard meanings and the self-relevant meanings in the situation. The identity process is a closed loop through the situation from input to output and back to input. When the loop is interrupted, the identity process discontinues operating normally. As a consequence, people suffer from some form of distress and uncertainty since their identity is no longer applicable, and they can no longer behave in the usual way. People would normally try to restore the situational meanings to match the meanings held in the identity standard. When this is not possible, the only thing that reduces the discrepancy is for the identity standard to change in order to be brought into alignment with the situational meanings.

Non-standard international assignments, along with the death of a spouse, job promotion, job loss or moving to a different location, could be classified as a major situational change with profound effects on individual involved in the disruption pattern. For the expatriate spouse in particular, non-standard international assignment is a very challenging experience causing the individual to lose their normal means of verifying their identities, thus being forced to alter their behaviour patterns. Non-standard international assignment interrupts daily routines and role expectations of a spouse who needs to manage family life disruptions and enter into new roles that are incongruent with his or her identity standards.

According to Andreason (2008), spouse adjustment is therefore seen as a process of reformulating the identity in response to the altered lifestyle. The inclusion of spouses in the initial selection process and later on in pre-departure training can help spouses better prepare themselves for identity interruption, and enable them to undertake necessary changes in behaviour to again establish the congruence between self-perception and identity.

### 3.2.3. Dimensions of spouse adjustment

Since the early beginnings of the identity theory, identity researchers have concentrated on role identity and the meanings people attribute to themselves while occupying various roles, such as being a parent, child, student, employee or spouse (Burke & Stets, 2009).

As defined by Burke and Reitzes (1981, p. 85), a role identity is "a set of meanings that are taken to characterize the self-in role". Burke and Stets (2009) additionally emphasise that role identity is tied to a social position that guides people's attitudes and behaviour. For the role identity of spouse, for example, the identity standard would include what it means to be a husband or wife. Individuals apply these internalized meanings to themselves, and act in ways that are consistent with the meanings in the spousal identity standard.

Moreover, Burke and Stets (2000) claim that having a particular role identity implies that people act to fulfil the role expectations, to coordinate interaction with role partners, and

manipulate the social situation to control the resources for which the role has responsibility. The underlying part of role identity resides in the differences in the perception and behaviour that associate with a specific role as it relates to counter roles. Therefore, role is a situation-specific external component of an identity, and can only be understood in relation to counter roles. The role identities "husband" or "male" are, hence, not isolated, but relate to the role identities "wife" and "female" respectively (Burke & Tully, 1977).

According to Stryker (1968), people recognise each other as occupants of roles, and invoke internalised expectations with respect to their actions and behaviour. Actions and behaviour are, however, not simply determined by these expectations, but rather are the product of a role-making process. This process is initiated by creating certain expectations, but fully developed through a subtle interchange among people in given situation that reshapes the form and the content of the interaction.

In addition to the role identity explained in the previous paragraph, the results of the exploratory study done by Mohr and Klein (2004) led to the identification of a dimension of spouse adjustment that accounts for the changes in spousal role as a consequence of non-standard international assignment. Spouses who participated in this study pointed out that they were confronted with a major change in their roles after the expatriates were sent to non-standard international assignment. As it has already been described, in such situations people strive to achieve identity-verification by enacting role performances that will keep their perceived self-meanings in a situation in line with their identity standard. Since more people are involved in role performance, mutual and coordinated effort might be required in order to accomplish identity-verification.

If people, however, do not obtain verification for role identities they claim, they will eventually become less committed to their role, and they might withdraw from an interaction. Alternatively, when role identity-verification is successful, people develop a strong commitment to the role, and the sense of self-efficacy reflects successful role performance (Burke & Stets, 2009). This, in turn, positively influences spouse adjustment to non-standard international assignments.

In their qualitative research, Shaffer and Harrison (2001) gained insights into spouse adjustment process that led them think of the notion as being a transformation of the spouse's personal and social roles, being either perceived in a different manner or being redefined by a change in personal situation as a consequence of the non-standard international assignment. They believe that all spouses go through some form of disruption or change when faced with the altered life situation, which arises as a result of the non-standard international assignment. Such disruptions may vary from simple disruption of the household routine or having to deal with the expatriate's tiredness to coping with the constant state of waiting for the expatriate to return home. This change in personal roles, according to their findings, requires a certain degree of psychological or behavioural adaptation for the spouses to feel comfortable in the new situation.

Moreover, social identity of a spouse during the non-standard international assignment is significantly undermined. As a result of the non-standard international assignment, expatriates and their spouses are separated for different periods of time, which may cause feelings of isolation, loneliness and depression. During expatriate's absence, spouses may even experience feelings of exclusion from particular social groups and may suffer from not receiving adequate social support from expatriates due to the lack of face-to-face contacts. Changes in social network and resources may consequently lead to psychological distress.

Similar to the findings of Mohr and Klein (2004) that role adjustment seems to be of great importance to spouses, Copeland and Norell (2002) point out that changes in roles, arising as a result of international mobility, may not be desirable for spouses. Physical separation due to non-standard international assignment forces spouses to temporarily take on a role of being a parent or single person only and not performing their usual roles as a spouse during the expatriate's absence.

However, expatriate spouses are faced with fundamental shifts caused by non-standard international assignments. They need to undertake great behavioural and psychological changes in order to adjust to the altered life situation, and to maintain their original identity or establish a new one. Considering the above theoretical explanation, it can be assumed that spouse adjustment, similar to expatriate adjustment, can be conceptualized as a multidimensional construct, consisting of three facets of adjustment: a) personal; b) social; and c) role adjustment. This theoretical model will be tested later on in the empirical part of this master thesis.

# 4 CONCEPTUAL MODEL

On the basis of the literature review and existing theoretical findings presented in the previous chapters, I will design a conceptual model that will be empirically tested in the consequent phases of my research. The model will provide me with the grounds for examining the relationship between the concepts of pre-departure training, expatriate adjustment on non-standard international assignments and spouse adjustment.

Figure 6. Research framework
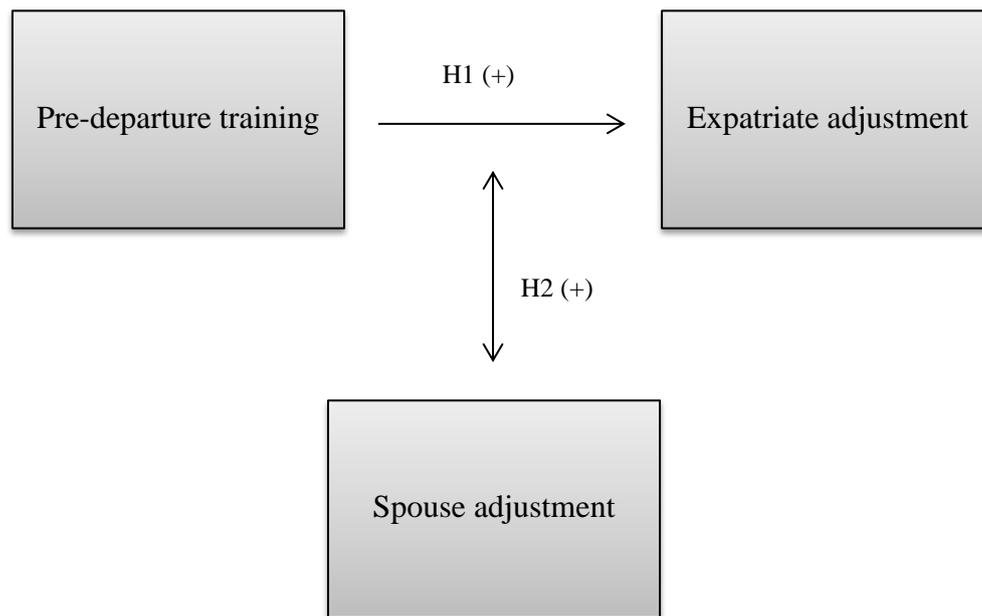


**4.1 The influence of pre-departure training on expatriate adjustment**

Pre-departure training for expatriates has received considerable attention as expatriate failure rates were attributed to a lack of adequate training (Shen, 2005). In her study of American multinationals, Tung (1987) indicated that the inability of the expatriate to adjust to a different physical or cultural environment and the inability to cope with the challenges posed by the non-standard international assignment are the most common reasons for expatriate failure.

Broadly speaking, the main objective of the pre-departure training is to enhance success and prevent failure of non-standard international assignments, therefore it is important that multinational organisations are aware of the fact that a thorough preparation of expatriates prior to the beginning of their assignment significantly contributes to their adjustment to local environment and to the accomplishment of their business objectives. Several authors agree that the objectives of a well-designed pre-departure training are threefold: a) to enable expatriates to determine the appropriate behaviours and norms in the host country; b) to help expatriates cope with unexpected events and situations in the host country; and c) to create realistic expectations with regard to living and working abroad (Brewster & Pickard, 1994; Black & Mendenhall, 1990; Earley, 1987; Kealey & Protheroe, 1996).

If multinational organisations expect expatriates to perform effectively, expatriates must possess the skills, knowledge and attitudes to be successful in a cross-cultural environment, and they must understand how to maximize developmental opportunities while abroad (Bennet et al., 2000). Numerous benefits can be achieved by providing expatriates with pre-departure training since it is seen as a means of reducing uncertainty in interactions with foreign nationals, and as a means for conscious switching to a culturally appropriate behaviour (Zakaria, 2000).

Relating to these facts, pre-departure training will assist expatriates in their adjustment to the host country and in successful performance, thereby reducing costs associated with a potential failure (Brewster, Sparrow, & Dickman, 2008). Even more, Briscoe and Schuler (2004) claim that appropriate pre-departure training is at least as important to expatriate's successful performance as selecting the right candidate in the first place. Research that has been conducted in recent years suggests that expatriates who are not well-prepared to confront with challenges they might encounter on non-standard international assignments find it difficult to adjust to living and working abroad and will consequently incur costly implications (Harzing & Van Ruyseeveldt, 2004).

Possessing this knowledge, multinational organisations can choose the appropriate profile of people with higher probability of adjustment on non-standard international assignments and take required steps to facilitate their adjustment. Thus, the way in which multinational organisations anticipate and provide suitable pre-departure training for future expatriates is an important starting point for enhancing the success of non-standard international assignments (Dowling & Welch, 2004). Based on the theoretical findings presented in the previous paragraphs, I assume that expatriates who receive pre-departure training prior to their non-standard international assignment are better able to determine the appropriate cultural behaviour and norms, and adjust more easily to the novel environment. I therefore propose the following hypothesis:

Hypothesis 1: Pre-departure training is positively related to expatriate adjustment.

Hypothesis 1a: Pre-departure training is positively related to interactional adjustment.

Hypothesis 1b: Pre-departure training is positively related to general adjustment.

Hypothesis 1c: Pre-departure training is positively related to work adjustment.

## 4.2 The moderating effect of spouse adjustment

Expatriate spouses are believed to have an immense impact on success of non-standard international assignments. The inability or unwillingness of the expatriate spouses to adjust to non-standard international assignments has been reported by several theorists as one of the most frequent causes of expatriate turnover (Black, 1988; Harvey, 1985; Suutari & Brewster, 1998; Tung, 1981). In their study of factors that contribute to the success of expatriates, Arthur and Bennett (1995) confirmed that spouses represent a potential asset or liability for multinational organisations.

In the survey report conducted by Brookfield Global Relocation Services (2013) spouse adjustment is cited to be the main challenge to the success of non-standard international assignments and eclipses all the factors combined at 91 % of respondents noting it as the key assignment challenge. Spouse adjustment, in fact, was also reported by many respondents to be the number one reason for assignment refusal. If reciprocal relationship between spouse and expatriate adjustment indeed exists, and spouses can exercise

significant influence over the expatriate's ability to adjust, then it seems crucial to gain a better understanding of what constitutes their adjustment and how this moderates expatriate adjustment (Black & Gregersen, 1991b).

An impressive body of research suggests that the adjustment of expatriates and their spouses is a mutually reinforcing process (Aycan, 1997; Black & Mendenhall, 1990; Fukuda & Chu, 1994; Caligiuri, Hyland, Joshi, & Bross, 1998). In their study of Japanese expatriates, Fukuda and Chu (1994) revealed that family situation has a profound impact on the success of an expatriate, and that the adjustment of the spouse is highly correlated to the adjustment of the expatriate. These findings are consistent with the results obtained by Takeuchi, Yun and Tesluk (2002) who found crossover effects between expatriate and spouse adjustment. In accord with their study, the authors suggest that when spouses are well-adjusted to non-standard international assignments, more emotional and psychological resources may be available to support the expatriate.

The extant research underscores the crucial role spouse adjustment plays in non-standard international assignments. Because spouse adjustment directly influences the level of adjustment experienced by expatriates, Shaffer, Harrison and Gilley (1999) propose that multinational organisations must put more emphasis on providing support to spouses who stay at home during the expatriate's non-standard international assignment. Despite this fact, a vast majority of multinational organisations are not doing enough to provide spouses with adequate support prior to the non-standard international assignment.

In spite of their immense importance, spouses still are a neglected variable in the field of non-standard international assignments. As far as it holds true that many non-standard international assignments fail due to the spouse maladjustment, I therefore develop the following hypotheses:

Hypothesis 2: Spouse adjustment to non-standard international assignments positively moderates between pre-departure training and expatriate adjustment.

Hypothesis 2a: Everyday life, daily tasks and household chores adjustment positively moderate between pre-departure training and expatriate adjustment.

Hypothesis 2b: Social identity, social life and social activities adjustment positively moderate between pre-departure training and expatriate adjustment.

Hypothesis 2c: Identity and personal development adjustment positively moderate between pre-departure training and expatriate adjustment.

# 5 METHODOLOGY

With the intention to gain insights into a model of expatriate and spouse adjustment, I applied and integrated both, qualitative and quantitative research methods. The chosen methodology tends to exploit the benefits of both approaches, while minimizing their respective disadvantages.

## 5.1 Inductive development of spouse adjustment model

I initially chose to delve into the model of spouse adjustment by using an inductive qualitative approach seeking to develop a conceptual framework for empirical testing. The purpose of this inductive phase was to clarify what constitutes spouse adjustment to non-standard international assignments, and to identify factors that facilitate or inhibit the adjustment process. As noted by Saunders, Lewis and Thornhill (2009), semi-structured interviews are non-standardised interviews with a set of themes and questions to be covered, but the procedure may vary from interview to interview, depending on a specific context. In order to be able to best elicit the experiences of the interviewees, I prepared a list of themes and questions to follow during the semi-structured interviews. In the beginning of each interview, the interviewees were asked about general demographic data, such as their age, number of children, their and their spouse's current occupation, and type and duration of non-standard international assignment their spouse is embarking on. Later on, I adapted the interview process to each interviewee, giving them the opportunity to reveal their own experiences.

The in-depth review of the existing literature on spouse adjustment and identity theory served as the basis for drafting an interview protocol that was used as a guideline for conducting semi-structured interviews with expatriate spouses:

1. Everyday life, daily tasks and household chores

- To what degree, based on your personal feeling and evaluation, does your everyday life change when your spouse is absent?
- Which aspects of your daily life change the most when your spouse is absent?
- How do you cope with new or unfamiliar tasks and responsibilities that you have to take on during your spouse's absence?
- What fundamental changes did you make in order to adjust to these new challenges?
- How stressful did you find these tasks?
- Considering daily tasks and responsibilities, what do you find positive about it?

2. Social identity, social life and social activities

- Do you think that your social role and social identity change during your spouse's absence?
- How does your spouse's absence impact on your social relationships?

- How do you feel among your friends or acquaintances when your spouse is absent? Do you feel pleasant, excluded, isolated, confident, accepted?
- Do you change your behaviour in the society during your spouse's absence? If yes, could you please provide an example?
- How does your spouse's absence impact on your relation to your friends?
- Would you say that the number of your friends and acquaintances have decreased, increased or remained the same during your spouse's absence?
- How often do you meet your friends and family? Could you please compare the period when your spouse is at home and when he or she is away?
- How would you evaluate your social life when your spouse is at home and when he or she is absent?
- Have you taken up any new activity during your spouse's absence that you would like to proceed with?
- How does your spouse's absence influence your relation to his or her family? Do you have fewer contacts with them or more? The same? How do you feel in the company of your spouse's family during his or her absence?
- How do you perceive the level of help and support that you receive from your family and friends? Do you get the support you need? Could you please provide an example?

3. Identity and personal development

- Do you feel that you have changed as a person during your spouse's absence?
- What aspects of yourself have remained the same?
- What aspects of yourself have changed?
- What challenged your identity the most when your spouse moved abroad?
- To what degree does your spouse's absence influence your perception of yourself?
- How do you feel during the non-standard international assignment?
- How would you evaluate your overall well-being when your spouse is absent?
- How stressful do you find the period when your spouse is absent? What stresses you the most?
- Would you say that you are proactive or self-initiative during the absence? Do you come up with new ideas? Do you make decisions on your own? Or would you rather say that you are passive, waiting for your spouse to return?
- Could you please think of everything you have experienced or learnt during the non-standard international assignment? What makes you proud? What gives you a feeling of satisfaction?
- Do you think that your spouse's absence impacts on your job performance and productivity in any way?

4. Experience evaluation

- How would you evaluate the experience as a whole?
- How do you feel about it after many years of experience? Please, compare the beginnings and now.
- What do you see as helpful to you in overcoming separation?
- What are you most proud of? What was the hardest part for you?
- What advice would you give to others in the similar situation?
- Based on your experience, what do people in similar situation need?
- Did you receive any type of training as an expatriate spouse? If yes, could you please tell what type?
- How do you perceive the role of organisation? Does the organisational support match your expectations?
- In your opinion, what kind of support or training would be optimal?

Semi-structured interviews were conducted with 5 expatriate spouses. I tried to maximize the heterogeneity of the sample in terms of age, gender, family responsibilities and non-standard international assignment type to capture as broad range of adjustment experiences as possible as depicted in Table 3.

Table 3. Interview participants

| Participant | Gender | Age | Assignment type | Number and age of children |
|:-----------:|:------:|:---:|:----------------|:---------------------------|
| A | female | 31 | short-term assignment | 2 children, 10 and 11 years |
| B | female | 57 | frequent business travel | 1 child, 34 years old |
| C | male | 56 | frequent business travel | 1 child, 29 years old |
| D | male | 49 | short-term assignment and frequent business travel | 4 children, 25, 18, 16 and 5 years old |
| E | female | 56 | short-term assignment and frequent business travel | 2 children, 34 and 25 years old |

I conducted face-to-face interviews that lasted between 30 and 60 minutes. However, I used a standardised set of questions listed above as a guideline, but allowed myself to adjust the interview process to each interviewee and their answers in order to get a detailed overview of the topic concerned. Interviews were recorded, transcribed and analysed with the aim of identifying dimensions that constitute spouse adjustment. During the interviews and the consequent analysis I noticed great differences between those interviewees whose spouses are frequent business travellers and those whose spouses were sent to a short-term assignment. Both reported that they feel changes in everyday life, but the changes were more severe in case of a short-term assignment, which I would explain by the fact that their everyday life was greatly interrupted and changed and they, consequently have more difficulties adapting to the altered lifestyle. Participant A so explained:

"I have always taken care of myself and had to learn practical things very early. I am very independent in this regard. But when he was away, I had to take care of everything, bills, costs, even his finances. I felt it as if a big burden was put on me, I was totally overloaded."

On the other hand, participants whose spouses are frequent business travellers stated:

"We all have a similar daily routine even if she is away."

"Our daily life does not change much because she is very busy even when she is at home."

None of the participants exposed big changes in relation to daily tasks and household chores, either because they are always responsible for them or because their spouses are frequently absent and had to overtake them in the course of their non-standard international assignment. They mentioned they need to arrange various tasks that are usually taken care of by their spouse, but none of them experiences it as a severe change that would greatly influence their everyday life. However, the participants who mentioned that they need to take care of tasks that are normally not a part of their responsibility were male. This insight is illustrated by the following comments:

"I do not miss him when it comes to household chores since I usually do them."

"I manage and organise everything even when he is at home."

"Maybe I have to go to the supermarket alone in order to buy something, for example cleaning products or food."

"When she is here, she usually does the washing-up. But when I am alone, I have to clean what I use."

All of the participants, however, mentioned that their social life and social activities markedly change when their spouses are absent due to their job responsibilities. The following extracts show the sort of changes they experience:

"When he is away, I have less social life since it is in his domain and he usually organises socializing with friends."

"If we plan to invite someone over or if we are invited to visit our friends, we do it together. Not really if one of us is alone."

"I spend more time socialising with my personal friends via social media."

"If he is absent for a longer period, I call my high school friends. Those we have been friends with for 30 or 40 years, but usually do not have time to socialise with."

In addition to that, participants A and D reported that not only do they socialise less frequently with the friends they have in common with their spouse, but they do not feel as relaxed and accepted in their company as when their spouses are present too.

"Our friends do invite me, but I feel better when we are both together."

"I might be less relaxed in the company of our friends when he is not present."

The expatriate spouses interviewed for this study emphasised they miss their partners during their absence. All of them commented that they miss their presence and the feeling of sharing their time and thoughts with them as they are accustomed to when they are at home:

"After he had gone, I missed his company, everyday conversations and getting up together the most."

"I feel like I am missing something when he is away."

"It is not a problem for me to physically arrange things, but the emotional connection is missing."

Surprisingly, three of the expatriate spouses who took part in the interview consider a non-standard international assignment as a very positive experience in terms of their independence and self-confidence. They emphasised that this type of lifestyle greatly influenced the way they perceive themselves in comparison to a time before their spouses had started to travel or departed on a short-term assignment. They were afraid of having to live, handle and organise things independently with no support received from their spouses before they were faced with the altered lifestyle. However, such responses were given from female participants. The following statements summarize their opinions:

"Perhaps I even feel more independent and self-confident because I see that I would be able to manage everything what he usually does."

"You see that you can handle things alone. From this point of view, this is a path to greater independency for me."

"This even increases my self-confidence and self-reliance."

Last but not least, the participants were asked to evaluate the whole experience arising due to their spouse's non-standard international assignment. All of them stressed that it requires a lot of energy and work on the relationship with their spouse, but on the other hand, they do not have any regrets to have decided for such lifestyle since they are well aware that this is a great opportunity for their spouses:

"It is a constant work on your relationship."

"You have to fight. If you become passive or give up, it has no point. It is over, you destroy the family."

In comparison to other participants, participant C takes a different standpoint and stresses that, due to his preference for constant change, he sees this way of life as very exciting, contributing to a dynamic relationship. Besides, expatriate spouses strongly emphasised that modern technology and possibility to communicate with your spouse very easily definitely makes the whole situation easier. The comments below illustrate this standpoint:

"Today you can stay in touch due to technology. Children can see her on the screen and talk to her. They can have a contact, which makes it a lot easier."

"The possibility to communicate for a reasonable price or even for free is important for the feeling that even if you are not physically together you can have a daily link in this way."

In the consequent steps of the analysis, I followed recommendations made by Slavec and Drnovšek (2012) in their article on scale development. I first generated a pool of potential items that sample the domain of the constructs identified on the basis of the literature review. As it was already mentioned, these constructs are: a) everyday life, daily tasks and household chores; b) social identity, social life and social activities; c) identity and personal development; and d) experience evaluation. From this pool of items, a new scale was derived. My initial pool included a large number of items; their appropriateness and relatedness to the constructs was assessed in the next step, which was content validity evaluation. Slavec and Drnovšek (2012, p. 43) define content validity as "the assessment of adequacy of the proposed items from the item pool by the relevant audience." The pool of potential items was administered to the relevant audience that was requested to evaluate their content validity. The audience comprised 16 international students at the Faculty of Economics in Ljubljana and 13 married or cohabitating couples, again trying to maximise their heterogeneity. They were requested to rate each item from the pool on a scale ranging from (1) not consistent at all to (3) very consistent, based on their perception about which construct is best described with the item in question. After the content validity phase was concluded, I analysed the results and chose 19 items that were best representative to the identified constructs. These items, according to the steps in the process of scale development, were included in the questionnaire on spouse adjustment and administered to the appropriate sample of respondent expatriate spouses in the consequent phase of the research.

**5.2 Quantitative study**

The second phase of my research included questionnaire development, translation and back-translation of the questionnaire, and sampling and data collection. I developed a dyadic questionnaire that was translated and back-translated into English. The equivalency of the original and back-translated version was evaluated prior the questionnaire was administered to the respondents.

**5.2.1    Data collection procedure**

Data for the empirical part of this master thesis were collected by administering an online questionnaire to expatriates and their spouses. The questionnaire was dyadic; the first part relating to pre-departure training and expatriate adjustment was administered to the sample of expatriates, while the second part related to spouse adjustment was administered to the sample of expatriate spouses. Potential respondents were initially contacted through social networks and online forums, and requested to contact me in case they would be interested in participation in order for me to be able to send them the hyperlink to the questionnaire. Besides, emails introducing the nature and purpose of the study were sent to international organisations and EU institutions with a request to forward it to their employees. Similar emails were sent directly to the members of the European Parliament with a request to participate as well. Moreover, I requested my personal contacts, who classified as appropriate respondents, to fill in the questionnaire. Since I asked them to introduce me to other potential members of my desired population, snowball sampling was used in order to come into contact with potential respondents, and it is therefore not possible to estimate the accurate number of emails sent. However, more than 500 emails were sent to different email addresses from my side only. By doing this, I gathered 52 expatriates and their spouses who expressed their willingness to respond to the questionnaire. Therefore, 52 dyadic questionnaires were generated and emails with hyperlinks were sent directly to these sample. Of the total 52 dyadic questionnaires sent out, 37 were filled in.

Data collection took place from mid-October to the end of November 2013. Each respondent was asked to fill in the questionnaire within one week, and a follow-up email was sent to those who did not respond in the given timeframe with a reminder asking them to do so within another week.

**5.2.2    Data analysis**

After collecting the necessary data, statistical software IBM SPSS Statistics was used to interpret the results obtained in the previous research phases. For this study, hierarchical multiple regression analysis was carried out, a statistical technique used to analyse the relationship between a single dependent variable and several independent variables. The objective of multiple regression analysis is to use the independent variables with known values to predict the single dependent value selected by the researcher (Hair, Black, Babin, Anderson, 2009).

### 5.2.3 Measures

The following variables were measured in the questionnaire: expatriate adjustment, pre-departure training, and spouse adjustment. Demographic data such as age, gender, nationality, current position in the organisation and type and duration of non-standard international assignment were included in the questionnaire as well.

Expatriate adjustment was measured on a 14-item scale that was originally developed by Black (1988) and taken directly from Black and Stephens (1989). The authors divided the construct of expatriate adjustment into three facets – general, interaction and work adjustment – that were employed in this study. Sample items for each of the facets examined in the study included items such as "living conditions in general", "interactions with host nationals on a day to day basis" and "specific job responsibilities". The respondents indicated the extent to which they feel adjusted or unadjusted to each item on a 7-point Likert scale starting with (1) very unadjusted to (7) very adjusted.

Pre-departure training was operationalized on the basis of nine training techniques proposed by Tung (1981) and Mendenhall and Oddou (1986). These training techniques are: a) factual briefings; b) role playing; c) critical incidents and cases; d) culture assimilator; e) language training; f) stress reduction training; g) assessment centre; h) field experiences; and i) sensitivity training. Pre-departure training was measured by the duration of each training technique, and by its overall effectiveness for expatriate adjustment in the host country. Respondents were first asked to indicate the amount of time that was dedicated to each training technique prior to their departure to non-standard international assignment on a scale ranging from (1) none to (8) more than one month. Besides, respondents were asked to rate each training technique in terms of its effectiveness for their adjustment. The scale ranged from (1) very ineffective to (5) very effective.

A measure of spouse adjustment was developed on the basis of semi-structured interviews with 5 expatriate spouses as described in the previous chapter. Spouse adjustment was measured with four constructs, each of them described by several items. These constructs are: a) everyday life, daily tasks and household chores; b) social identity, social life and social activities; c) identity and personal development; and d) experience evaluation. Sample items described possible situations that spouses might encounter during non-standard international assignments, and included statements such as "I cook more rarely since I can eat at work", "I have not taken up any new activity in this period", "This way of life has even increased my self-confidence and self-reliance", and "It takes a lot of energy". Participating spouses were asked to indicate their agreement with each of the statements on a 5-point Likert scale ranging from (1) strongly disagree to (5) strongly agree.

### 5.2.4 Sample

The survey was completed by 37 expatriates. A total of 21 or 56.8 % were male and a total of 16 or 43.2 % were female. The average age of the sample was 41.2 years. The youngest respondent was 23 years old, and the oldest was 59 years old. People aged between 41 and 50 years are prevailing in the sample and represent 29.7 % of all respondents, followed by the age group between 21 and 30 years and people older than 51 years, representing 24.3 % of the sample each. 21.3 % respondent expatriates were aged between 31 and 40 years.

*Figure 7.* Expatriate age distribution
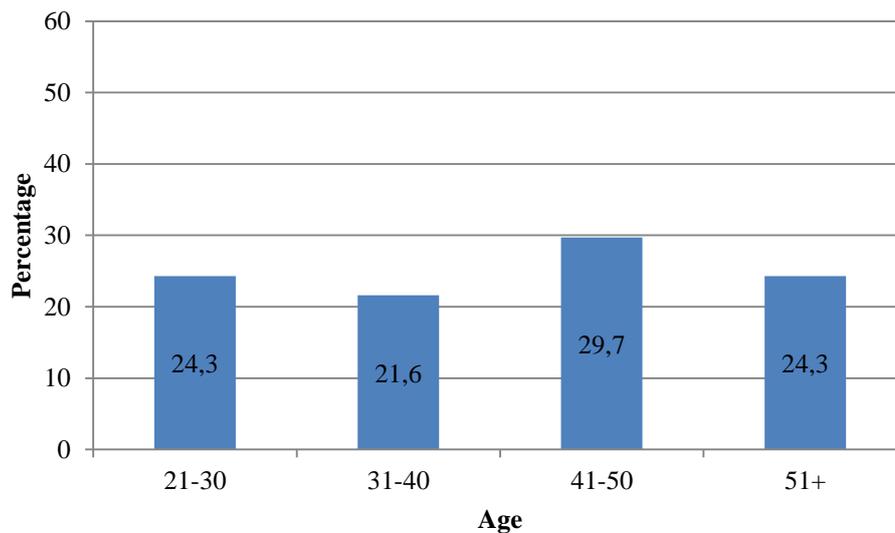


In terms of expatriate nationality, 56.8 % of the respondents are of Slovene nationality and 43.2 % are of other nationality, including Swedish, Austrian, British, Turkish, Hungarian, Austrian, Bulgarian, Danish, Spanish, Greek and Canadian.

Figure 8. Expatriate nationality in %



*Figure 8.* Expatriate nationality in %
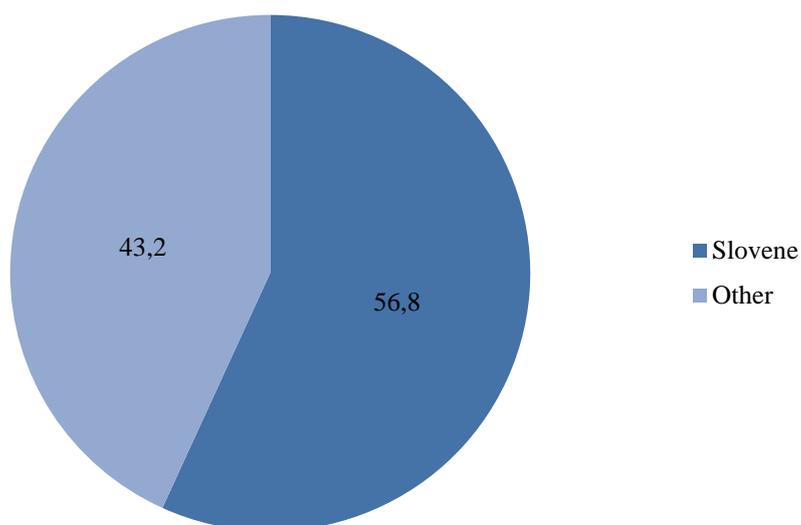
The expatriate sample consists of the following: 45.9 % executives and top managers, 18.9 % translators and interpreters, 10.8 % business consultants, 10.8 % academic members and 5.4 % military members. The lowest share of respondents is represented by pilots and politicians, comprising 2.7 % of all respondents each.

*Figure 9.* Current occupation
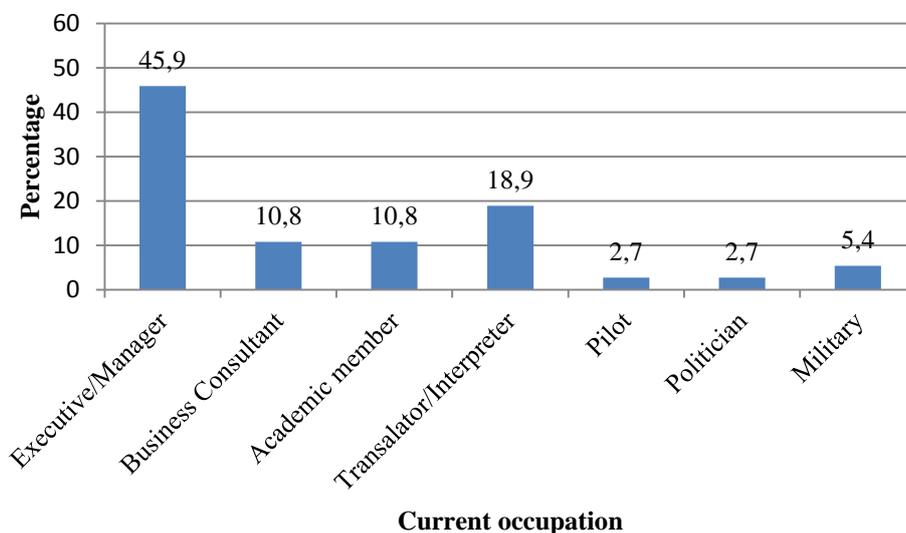


Most of the respondents are on a short-term assignment, representing 43.2 % of the total sample, followed by frequent business travel with 32.4 % and commuter assignments with 21.6 %. The duration of non-standard international assignments ranges from 1 to 520 weeks, with the average being 95.67 weeks.

*Figure 10*. Assignment type



*Figure 10*. Assignment type
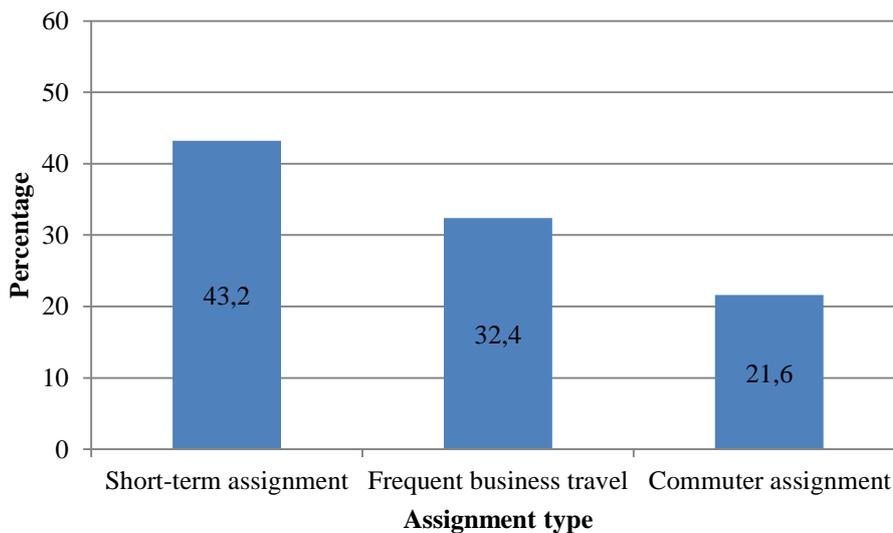
37 expatriate spouses responded to the survey too. As regards gender distribution, the picture for expatriate spouses is exactly reverse in comparison to the expatriate sample. A total of 16 or 43.2 % of respondents were male, while a total of 21 or 56.8 % were female. The expatriate spouses are, on average, 40.8 years old. The youngest of expatriate spouses is 25 years old and the oldest is 60 years old. A majority of expatriate spouses belong to the age group between 31 and 40 years, which represents 35.1 % of all expatriate spouses in the sample, followed by the age group above 51 with 24.3 %. 21.6 % of expatriate spouses are aged between 41 and 50 years, while 18.9 % of them belong to the age group between 21 to 30 years.

*Figure 11*. Age distribution for expatriate spouses
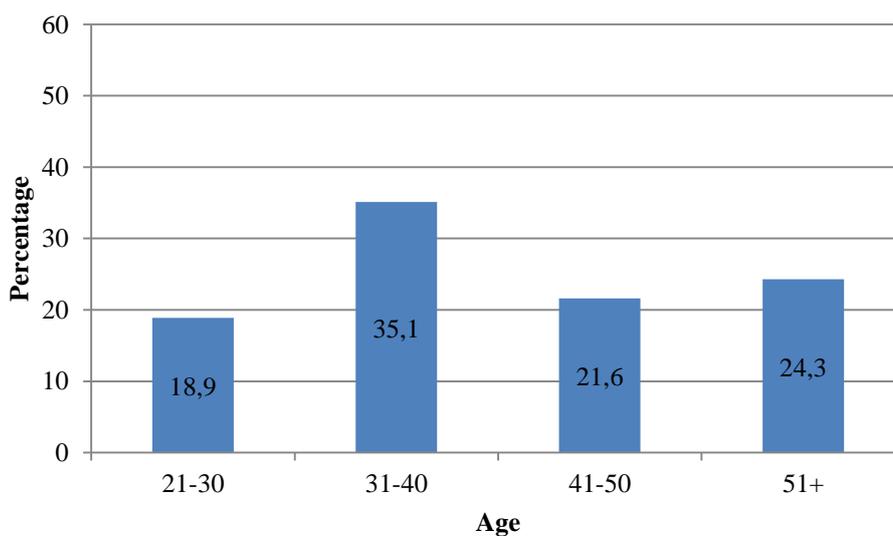


In terms of their nationality, 43.2 % of expatriate spouses are of Slovene nationality and 56.8 % are of other nationality, including Swedish, Austrian, German, British, Turkish,

Hungarian, Austrian, Bulgarian, Danish, Spanish, Greek, Russian, French, Croatian and Chinese.

*Figure 12*. Expatriate spouses' nationality in %
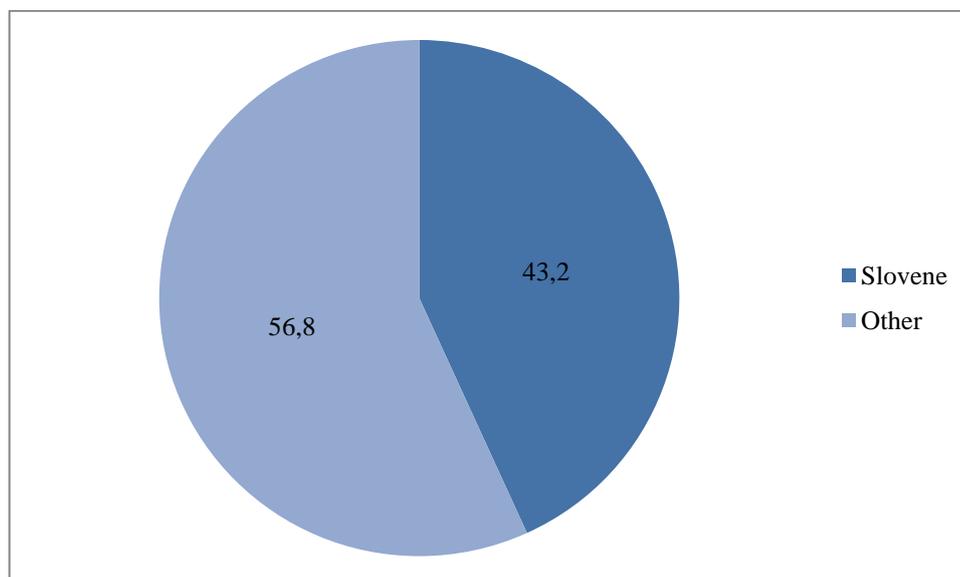


## 6 RESULTS AND DISCUSSION

### 6.1 The influence of pre-departure training on expatriate adjustment

As already explained in the theoretical part, expatriate adjustment can be differentiated into three facets – general, work and interaction adjustment – that were measured in the questionnaire. Pre-departure training, moreover, was operationalised by two questions in the questionnaire, one relating to how much time was dedicated to each training technique, and the other relating to overall effectiveness of each training technique for the expatriate adjustment in the host country.

Simple linear regression was performed to test the first hypothesis. In order to be able to test the first hypothesis I first computed new variables from the existing ones and got the following variables: a) general adjustment; b) interactional adjustment; c) work adjustment; d) total adjustment; and e) pre-departure training[1]. Table 4 presents correlation analysis between dependent (work adjustment, interactional, adjustment, general adjustment, total adjustment) and independent variables (pre-departure training). As can be inferred from the table, none of the dependent variables has a significant relationship with the independent variable.

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[1] A computed measure of hours of training received and effectiveness as rated by expatriates

Table 4. Correlation matrix

| | | Total adjustment | General adjustment | Interactional adjustment | Work adjustment | Pre-departure training |
|---|---|---|---|---|---|---|
| **Total adjustment** | Pearson correlation | 1 | .085** | .740** | .585** | .114 |
| | Sig (2-tailed) | | .000 | .000 | .000 | .510 |
| **General adjustment** | Pearson correlation | .805** | 1 | .258 | .268 | .121 |
| | Sig (2-tailed) | .000 | | .124 | .109 | .481 |
| **Interactional adjustment** | Pearson correlation | .740** | .258 | 1 | .368* | -.070 |
| | Sig (2-tailed) | .000 | .124 | | .025 | .685 |
| **Work adjustment** | Pearson correlation | .585** | .268 | .368* | 1 | .293 |
| | Sig (2-tailed) | .000 | .109 | .025 | | .083 |
| **Pre-departure training** | Pearson correlation | .114 | .121 | -.070 | .293 | 1 |
| | Sig (2-tailed) | .510 | .481 | .685 | .083 | |

*Note.* **Correlation is significant at the 0.01 level (2-tailed).
*Note.* *Correlation is significant at the 0.05 level (2-tailed).

### 6.1.1 Hypothesis 1: Pre-departure training is positively related to expatriate adjustment

The value of $R^2$ for the above model is 0.013, implying that pre-departure training can account for 1.3 % of total variation in expatriate adjustment. As depicted in Table 5 below, the beta value (Beta = 0.114, p = 0.510) shows no statistical significance, again indicating that pre-departure training does not influence expatriate adjustment. The F-value of 0.444 is not statistically significant at p = 0.510 and the null hypothesis that there is no correlation between pre-departure training and expatriate adjustment cannot be rejected.

Table 5. Model summary – expatriate adjustment

| Independent variable | Unstandardized Coefficients | | Standardized Coefficients | Sig. |
|---|---|---|---|---|
| | B | Std. Error | Beta | |
| Constant | 5.107 | .161 | | .000 |
| Pre-departure training | 8.803E-5 | .000 | .114 | .510 |

Based on the results presented in the above paragraph, I cannot claim that there is a positive relation between pre-departure training received by expatriates before they embark on non-standard international assignment and their adjustment in the host country. Therefore, I have to reject the first hypothesis.

### 6.1.2 Hypothesis 1a: Pre-departure training is positively related to interactional adjustment

The value of $R^2$ is 0.005 and indicates that pre-departure training explains only 0.5 % of total variation in interactional adjustment. As the model summary in Table 6 tells us, the beta value (Beta = - 0.070, p = 0.685) is not statistically significant, indicating that pre-departure training does not have an influence on interactional adjustment. The F-value of 0.167 is not statistically significant at p = 0.685. Therefore, the null hypothesis that there is no correlation between pre-departure training and interactional adjustment cannot be rejected.

Table 6. Model summary – interactional adjustment

| Independent variable | Unstandardized Coefficients | | Standardized Coefficients | Sig. |
|---|---|---|---|---|
| | B | Std. Error | Beta | |
| Constant | 4,751 | .279 | | .000 |
| Pre-departure training | -9.363E-5 | .000 | -.070 | .685 |

### 6.1.3 Hypothesis 1b: Pre-departure training is positively related to general adjustment

The results tell us that $R^2$ value is 0.015, which means that pre-departure training accounts for 1.5 % of the variation in general adjustment. Table 7 summarizes details of the model parameters and the significance of these values. The beta value (Beta = 0.121, p = 0.481) is again not statistically significant and it can be concluded that pre-departure training does not influence general adjustment. Furthermore, the model summary shows that the null hypothesis cannot be rejected since F-value of 0.507 is not statistically significant at p = 0.481. This tells us that there is no correlation between pre-departure training and general adjustment as predicted.

Table 7. Model summary – general adjustment

| Independent variable | Unstandardized Coefficients | | Standardized Coefficients | Sig. |
|---|---|---|---|---|
| | B | Std. Error | Beta | |
| Constant | 5.039 | .201 | | .000 |
| Pre-departure training | .000 | .000 | .121 | .481 |

### 6.1.4   Hypothesis 1c: Pre-departure training is positively related to work adjustment

Analysis revealed that pre-departure training can account for 8.6 % of the variation in work adjustment ($R^2$ = 0.086). Table 8 provides details of the model parameters and their significance value. Since we assume that there is directional relationship between pre-departure training and work adjustment – pre-departure training contributes to increased adjustment – we test the model by using one-tailed significance test. The beta value (Beta = 0.293, p = 0.083) shows weak statistical significance, indicating that pre-departure training is positively related to work adjustment.

Table 8. Model summary – expatriate adjustment

| Independent variable | Unstandardized Coefficients | | Standardized Coefficients | Sig. |
|---|---|---|---|---|
| | B | Std. Error | Beta | |
| Constant | 5.748 | .165 | | .000 |
| Pre-departure training | .000 | .000 | .293 | .083 |

### 6.2 Spouse adjustment to non-standard international assignments positively moderates between pre-departure training and work adjustment

Hypothesis 2 was tested by performing hierarchical multiple regression analysis. Since only the dimension of work adjustment showed any statistical significance in the previous step of the analysis, I decided to include only this dimension into further analysis to get relevant results. Before carrying out the analysis, I decided not to consider two statements referring to spouse adjustment as it is not clear enough whether higher level of agreement with each of the statements indicates greater or lower level of adjustment. These statements are: a) Being able to keep in touch via Skype is very beneficial; and b) You have to reorganise your life anew.

Table 9 demonstrates correlation coefficients between the predictors in the model. The results show that only the correlation between pre-departure training and work adjustment is statistically significant (r = 0.317, p-value = 0.041).

Table 9. Correlation coefficients

| | | Work adjustment | Age | Gender | Pre-departure training | Pre-departure training*spouse adjustment |
|---|---|---|---|---|---|---|
| **Pearson correlation** | **Work adjustment** | 1.000 | -.055 | -.016 | .317 | -.184 |
| | **Age** | -.055 | 1.000 | -.263 | .110 | .144 |
| | **Gender** | -.016 | -.263 | 1.000 | -.174 | .147 |
| | **Pre-departure training** | .317 | .110 | -.174 | 1.000 | .127 |
| | **Pre-departure training*spouse adjustment** | -.184 | .144 | .147 | .127 | 1.000 |
| **Sig. (1-tailed)** | **Work adjustment** | | .385 | .465 | .041 | .160 |
| | **Age** | .385 | | .076 | .278 | .220 |
| | **Gender** | .465 | .076 | | .175 | .216 |
| | **Pre-departure training** | .041 | .278 | .175 | | .248 |
| | **Pre-departure training*spouse adjustment** | .160 | .220 | .216 | .248 | |

The results obtained in the analysis demonstrate that gender and age explain 0.4 % of the variation in work adjustment. By adding pre-departure training into the model, further 10.9 % of total variation in work adjustment can be explained. The last predictor, the moderating effect between pre-departure training and spouse adjustment, accounts for 5.1 % of total variation. The total variation explained by all predictors in the model is 16 %. However, F-test is not statistically significant for any of the predictors.

Based on the estimates of b-values, which are displayed in Table 10, the model can be defined as follows:

Work adjustment = − 0.02 − 0.039 *age + 0.066*gender + 0.331*pre-departure training − 0.267*pre-departure training*spouse adjustment.

Table 10. Model summary - spouse adjustment

| Independent variables | Unstandardized Coefficients | | Standardized Coefficients | Sig. |
|---|---|---|---|---|
| | B | Std. Error | Beta | |
| Constant | -.020 | .169 | | .905 |
| Age | -.039 | .178 | -.042 | .826 |
| Gender | .066 | .180 | .070 | .719 |
| Pre-departure training | .331 | .168 | .363 | .060 |
| Pre-departure training*spouse adjustment | -.267 | .213 | -.235 | .221 |

However, none of the b-values is statistically significant, implying that none of the predictors is making a significant contribution to work adjustment. For this reason, we cannot assume that spouse adjustment to non-standard international assignments positively moderates between pre-departure training and work adjustment. The standardized beta value for moderating effect between pre-departure training and spouse adjustment does not have a statistically significant p-value (Beta = -.235, p = .221), implying that the relationship between work adjustment and pre-departure training does not depend on the values of spouse adjustment.

### 6.2.1 Hypothesis 2a: Everyday life, daily tasks and household chores adjustment positively moderate between pre-departure training and work adjustment

Table 11 presents correlation analysis between the predictors in the model. As can be inferred from the table, the correlations between age and gender, pre-departure training and work adjustment and between the moderating effect of pre-departure training and spouse

adjustment – everyday life, daily tasks and household chores and gender are statistically significant.

Table 11. Correlation coefficients

| | | Work adjustment | Age | Gender | Pre-departure training | Pre-departure training*spouse adjustment – everyday life |
|---|---|---|---|---|---|---|
| **Pearson correlation** | **Work adjustment** | 1.000 | -.035 | .025 | .333 | .052 |
| | **Age** | -.035 | 1.000 | -.298 | .168 | -.075 |
| | **Gender** | .025 | -.298 | 1.000 | -.166 | .284 |
| | **Pre-departure training** | .333 | .168 | -.166 | 1.000 | -.188 |
| | **Pre-departure training*spouse adjustment – everyday life** | .052 | -.075 | .284 | -.188 | 1.000 |
| **Sig. (1-tailed)** | **Work adjustment** | | .421 | .444 | .025 | .384 |
| | **Age** | .421 | | .041 | .168 | .334 |
| | **Gender** | .444 | .041 | | .170 | .049 |
| | **Pre-departure training** | .025 | .168 | .170 | | .140 |
| | **Pre-departure training*spouse adjustment – everyday life** | .384 | .334 | .049 | .140 | |

The results tell us that gender and age account for 0.1 % of the variance in work adjustment, while pre-departure training accounts for further 12.1 % of total variance. By including another predictor, the moderating effect between pre-departure training and spouse adjustment - everyday life, daily tasks and household chores, the value of $R^2$ increases from 0.123 to 0.133, which means that this predictor explains additional 1.0 % of

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total variance in work adjustment. All the predictors together explain 13.3 % of total variance in work adjustment. F-test is, however, statistically significant only for the model including age, gender and pre-departure training with p-value being 0.047.

Based on the estimates of b-values, which are displayed in Table 12 below, the model can be defined as follows:

Work adjustment = – 0.097 – 0.078 *age + 0.032*gender + 0.362*pre-departure training + 0.137*pre-departure training*spouse adjustment – everyday life, daily tasks and household chores.

Table 12. Model summary - everyday life, daily tasks and household chores

| Independent variables | Unstandardized Coefficients | | Standardized Coefficients | Sig. |
|---|---|---|---|---|
| | B | Std. Error | Beta | |
| Constant | -.097 | .166 | | .563 |
| Age | -.078 | .175 | -.080 | .660 |
| Gender | .032 | .181 | .033 | .862 |
| Pre-departure training | .362 | .171 | .372 | .043 |
| Pre-departure training*spouse adjustment – everyday life | .137 | .231 | .106 | .558 |

However, the t-test shows statistical significance only for pre-departure training, implying that this predictor is making a significant contribution to work adjustment. The standardized beta value for moderating effect between pre-departure training and spouse adjustment – everyday life, daily tasks and household chores does not have a statistically significant p-value (Beta = .106, p = .558), which means that the relationship between work adjustment and pre-departure training does not depend on the values of spouse adjustment - everyday life, daily tasks and household chores. Hypothesis 2a must, therefore, be rejected.

### 6.2.2 Hypothesis 2b: Social identity, social life and social activities adjustment positively moderate between pre-departure training and work adjustment

Correlation coefficients between the predictors analysed in the model are shown in Table 13. The results demonstrate that the relationship between age and gender and between age and the moderating effect of pre-departure training and spouse adjustment is statistically significant with p-value of 0.033 in both cases.

Table 13. Correlation coefficients

| | | Work adjustment | Age | Gender | Pre-departure training | Pre-departure training*spouse adjustment – social identity |
|---|---|---|---|---|---|---|
| **Pearson correlation** | **Work adjustment** | 1.000 | -.012 | -.079 | .266 | -.140 |
| | **Age** | -.012 | 1.000 | -.315 | .151 | .314 |
| | **Gender** | -.079 | -.315 | 1.000 | -.166 | .046 |
| | **Pre-departure training** | .266 | .151 | -.166 | 1.000 | .023 |
| | **Pre-departure training*spouse adjustment** | -.140 | .314 | .046 | .023 | 1.000 |
| **Sig. (1-tailed)** | **Work adjustment** | | .474 | 326 | .061 | .212 |
| | **Age** | .474 | | .033 | .194 | .033 |
| | **Gender** | .326 | .033 | | .170 | .397 |
| | **Pre-departure training** | .061 | .194 | .170 | | .448 |
| | **Pre-departure training*spouse adjustment – social identity** | .212 | .033 | .397 | .448 | |

The values of $R^2$ show that gender and age identify only 0.8 % of total variance in work adjustment and pre-departure training accounts for 6.9 % of total variance. The moderating effect between pre-departure training and spouse adjustment - social identity, social life and social activities accounts for additional 1.7 % of variance in work adjustment. All the predictors together explain 9.3 % of total variance in work adjustment, suggesting that there might be other factors with a significant influence on the model, which were not

considered in the analysis. However, F-test does not show statistical significance for any of the predictor. For this reason, the hypothesis 2b cannot be accepted. Therefore, it cannot be assumed that social identity, social life and social activities positively moderate between pre-departure training and expatriate adjustment.

Considering the estimates of b-values, the model can be described as follows:

Work adjustment = 0.038 − 0.017*age − 0.031*gender + 0.244*pre-departure training − 0.157*pre-departure training*spouse adjustment - social identity, social life and social activities.

However, b-values indicate that none of the predictors in the model is statistically significant. It can be assumed that none of the predictors is making a worthy contribution to work adjustment. The standardized beta value for moderating effect between pre-departure training and spouse adjustment - social identity, social life and social activities does not have a significantly small p-value (Beta = - 0.138, p = 462), implying that the relationship between work adjustment and pre-departure training does not depend on the values of spouse adjustment - social identity, social life and social activities. Table 14 presents values into detail.

Table 14. Model summary - social identity, social life and social activities

| Independent variables | Unstandardized Coefficients | | Standardized Coefficients | Sig. |
|---|---|---|---|---|
| | B | Std. Error | Beta | |
| Constant | .038 | .158 | | .812 |
| Age | -.017 | .178 | -.019 | .923 |
| Gender | -.031 | .171 | -.034 | .856 |
| Pre-departure training | .244 | .162 | .267 | .143 |
| Pre-departure training*spouse adjustment – everyday life | -.157 | .211 | -.138 | .462 |

### 6.2.3 Identity and personal development adjustment positively moderate between pre-departure training and work adjustment

Table 15 displays the values of Pearson correlation coefficients and the corresponding significance values. The results reveal that the correlation between the predictors of age and gender is statistically significant with p-value of 0.053. Besides, the relationship between pre-departure training and work adjustment proved to be statistically significant as well (r = .289, p = .046).

Table 15. Correlation coefficients

| | | Work adjustment | Age | Gender | Pre-departure training | Pre-departure training*spouse adjustment – identity |
|---|---|---|---|---|---|---|
| **Pearson correlation** | **Work adjustment** | 1.000 | -.021 | .000 | .289 | -.047 |
| | **Age** | -.021 | 1.000 | -.278 | .130 | .026 |
| | **Gender** | .000 | -.278 | 1.000 | -.127 | .044 |
| | **Pre-departure training** | .289 | .130 | -.127 | 1.000 | .302 |
| | **Pre-departure training*spouse adjustment - identity** | -.047 | .026 | .044 | .302 | 1.000 |
| **Sig. (1-tailed)** | **Work adjustment** | | .452 | .500 | .046 | .395 |
| | **Age** | .452 | | .053 | .229 | .442 |
| | **Gender** | .500 | .053 | | .234 | .401 |
| | **Pre-departure training** | .046 | .229 | .234 | | .039 |
| | **Pre-departure training*spouse adjustment –identity** | .395 | .442 | .401 | .039 | |

On the basis of the results obtained in the analysis, gender and age does not explain any variance in work adjustment, while pre-departure training accounts for 8.7 % of total variance. The last predictor, moderating effect between pre-departure training and spouse adjustment − identity and personal development identifies 2.1 % of total variance. The values for F-test, nevertheless, are not statistically significant. Consequently, we cannot assume that spouse adjustment - identity and personal development positively moderate between pre-departure training and work adjustment, and hypothesis 2c must therefore be rejected.

As can be inferred from Table 16 below, the model can be defined as follows:

Work adjustment = − 0.029 − 0.053 *age + 0.036*gender + 0.345*pre-departure training − 0.121*pre-departure training*spouse adjustment − identity and personal development.

However, since b-values are not statistically significant it can be assumed that none of the predictors greatly contribute to work adjustment. The standardized beta value for moderating effect between pre-departure training and spouse adjustment − identity and personal development does not have a statistically significant p-value (Beta = -.152, p = .410), implying that the relationship between work adjustment and pre-departure training does not depend on the values of spouse adjustment − identity and personal development.

Table 16. Model summary - identity and personal development

| Independent variables | Unstandardized Coefficients | | Standardized Coefficients | Sig. |
|---|---|---|---|---|
| | B | Std. Error | Beta | |
| Constant | -.029 | .171 | | .868 |
| Age | -.053 | .184 | -.052 | .774 |
| Gender | .036 | .182 | .036 | .843 |
| Pre-departure training | .345 | .183 | .347 | .069 |
| Pre-departure training*spouse adjustment – identity | -.121 | .144 | -.152 | .410 |

## 6.3 Discussion

The analysis performed for the purposes of this research demonstrated quite surprising results. Only one of the hypotheses could have been confirmed, which is in my opinion primarily so due to the small sample size and a great number of missing values. As claimed by Takeuchi (2010), the relatively low response rate hinders international studies on expatriate adjustment. However, obtaining a large enough sample size has become even greater issue when attempting to collect additional data from other stakeholders, such as spouses, which has become apparent in my empirical study as well.

The results obtained in the analysis demonstrate weak statistical evidence that pre-departure training influences work adjustment, but not interactional and general adjustment. This finding is in consistence with meta-analysis performed by Bhaskar-Shrinivas, Harrison, Shaffer and Luk (2005) that has identified work adjustment as one of the strongest predictors of expatriate effectiveness. Besides, multinational organisations primarily focus only on managerial and technical skills when selecting and preparing their employees for international assignments therefore it seems logical that pre-departure training and work adjustment turned out to be positively related.

As it turned out during the analysis, a vast majority of respondents did not receive any type of pre-departure training prior to the beginning of their non-standard international assignment, which strongly corresponds to theoretical findings that a large number of multinational organisations are still reluctant to provide any type of pre-departure training to their expatriates. According to Briscoe and Schuler (2004), a lot of evidence suggests that multinational organisations generally still do not pay much attention to preparing their expatriates for the challenges they are confronted with on non-standard international assignments. Surveys point out that only approximately 35 % of multinational organisations offer any kind of pre-departure training even though the expatriate's inability to adjust is cited as the major reason for failures in international business settings. In addition to that, survey conducted by Brookfield Global Relocation Services (2013) reveals that only about 22 % of expatriates have previous assignment experience, which clearly supports the fact that multinational organisations should become cognizant of the importance of pre-departure training and its potential benefits for future expatriates. These findings, nevertheless, build a solid ground to claim that pre-departure training, if appropriately advocated to expatriates, would facilitate their adjustment on non-standard international assignments. In spite of the fact that I was not able to confirm a positive relationship between pre-departure training and expatriate adjustment, I still allow a possibility that the results would turn out differently if I would be able to collect more respondents. As it was already mentioned, my analysis was greatly hindered by a large number of missing values and non-applicable options chosen by the respondents who did not undergo any type of pre-departure training and were consequently not able to respond to the question, which has certainly had an impact on the analysis results.

The results obtained for the question relating to the overall effectiveness of training techniques for expatriate adjustment to the host country display a relatively similar picture. A great number of non-applicable options has caused immense difficulties with statistical analysis and most probably contributed to the fact that the first hypothesis could not be supported. This, on the other hand, is consistent with theoretical findings that multinational organisations are not doing enough in terms of pre-departure training and cross-cultural skill development for their expatriates. Several authors have delved into the concept of pre-departure training programmes (Black & Mendenhall, 1989; Tung, 1981; 1998), and reached a conclusion that the more rigorous the training the more effectively the expatriate will be able to appropriately execute the learned behaviour while on non-standard international assignment. As explained by Black and Mendenhall (1989) in their article, rigor refers to the level of cognitive involvement required by the expatriate during the pre-departure training, whereby higher training rigor increases expatriate's attention and consequently improves his or her reproduction ability.

Besides, Tung (1998) mentions that pre-departure training aims at providing the expatriates with a realistic picture of what they can expect in the host country, and more rigorous training techniques certainly better fulfil this aim. The analysis results collected on the basis of respondents who actually received this training technique prior to their departure to non-standard international assignment reveal that field experience was rated as the most effective training technique, followed by factual briefings, critical incidents and cases, and sensitivity training. Culture assimilator, on the other hand, was rated as the least effective training technique. It can be noticed that more rigorous training techniques were rated as more effective by participating sample of expatriates, while culture assimilator identified as a less rigorous training technique was rated as the least effective training technique for adjustment in the host country. Despite the fact that factual briefings are classified as a training technique with low rigor this technique was identified by the respondents as somewhat effective, which can be interpreted by the fact that it is most widely provided to the expatriates by the majority of multinational organisations, and was consequently rated by the highest number of respondents. Since factual briefings require little time and financial resources, they are often used as the only training technique offered to expatriates. They, for this reason, most probably do not have experience with any other type of pre-departure training, which may explain why this training technique received high mean in the analysis. The fact that more rigorous training techniques were rated as more effective can be an important finding for multinational organisations since they usually offer pre-departure training that is low in rigor and does not adequately prepare expatriates for non-standard international assignments.

The second hypothesis relating to spouse adjustment could not have been accepted as well. The main reason, most probably, again lies in a small sample size and we can assume that a positive relation might have been found if the sample of respondent expatriate spouses would have been bigger. Nevertheless, the results still offer some interesting insights into the concept in question. As it turned out in the course of the analysis, age seems to account for a certain percentage in total variance in spouse adjustment. This explanation seems

plausible as Mohr and Klein (2004), in their empirical study, found out that older expatriate spouses experience fewer problems adjusting to the altered lifestyle in comparison to their younger counterparts. Older spouses have likely experienced more changes in the course of their lives and are consequently better able to adjust to the changes and interruptions caused by non-standard international assignments. This could indicate that age is a predictor of adjustment and that older spouses probably experience less stress and anxiety when faced with new situation. Since the expatriate spouses in my sample were, on average, 40.8 years old, it can be assumed that this is the reason why they have generally reported to experience fewer difficulties during the expatriates' absence.

The analysis has shown that there is a considerable difference in the way how men and women adjust to non-standard international assignments, especially with regard to everyday life, daily tasks and household chores. This fact can be supported on the basis of the Burke's identity theory, which explains that disruptions in the identity process occur when people are confronted with major changes (Burke, 1991). Since women are usually responsible for household chores and daily tasks that need to be arranged in a family, the absence of their spouse does not pose such a big challenge to them as opposed to their male counterparts. A majority of them is, all of a sudden, confronted with a totally unknown situation they are forced to surmount, which can account for the difference in adjustment between male and female respondents in this category.

Furthermore, post hoc comparisons using Games-Howell test determined that differences in spouse adjustment occur in relation to the type of non-standard international assignment. Results demonstrate that spouses are generally better adjusted in the category of identity and personal development when expatriates embark on short-term assignment. Non-standard international assignments can, by all means, be classified as an extreme situational change that profoundly affects expatriate spouses and greatly interrupt their daily routines and lifestyle. However, as can be concluded on the basis of identity theory, identity meanings are greatly challenged in case of a non-standard international assignment as they represent a considerable interruption in spouses' regular life. Consequently, spouses must resist distress and re-establish their identity standard. These interruptions are much more severe in case of frequent business travel or commuter assignments as in comparison to short-term assignments since interruptions are continuous and spouses are constantly faced with severe changes and must repeatedly go through the process of re-establishing their identity standard. This fact explains why spouses better adjust to short-term assignments.

Based on the interviews that I conducted with expatriate spouses, it can be inferred that spouses are not even aware of the topic concerned. None of them has ever considered their adjustment as an issue that requires any attention and all of them have put the expatriate in the foreground, not considering their situation, needs or expectations. This again corresponds to theoretical findings. Dowling and Welch (2004) namely indicate that multinational organisations are still reluctant to include expatriate spouses into selection

process and do not provide them with any kind of pre-departure training, thus treating them merely in a peripheral way.

On the basis of the insights that I have gained during the interviews with expatriate spouses, I suppose that spouse adjustment is also greatly influenced by their employment status. Those spouses who are full-time employed and fully occupied with daily routines generally perceive this situational change as less severe in comparison to those spouses who have more free time. Additionally, spouse adjustment could also be culture-specific. Since expatriate spouses who responded to my questionnaire belong to differing cultural backgrounds I allow a possibility that the results might have been influenced by this fact. Perhaps it would be reasonable to conduct a culture-specific study. The study in question provides very general results and did not consider cultural background of respondents and its specific way of reacting to non-standard international assignments. However, I now think that control questions relating to expatriate spouse's employment status and cultural context should be included in the questionnaire.

However, I suppose that results could turn out differently if my sample would have been bigger since Field (2009) claim that when we have small samples, for example only a few participants, moderate correlations may misleadingly not reach statistical significance. When we have large samples, on the other hand, small correlations may misleadingly prove to be significant. Significance should, therefore, be reported, but perhaps should receive less focus when it comes to Pearson's correlation coefficient. Based on this fact, there might be a feasible possibility that I would be able to find a positive relation between dependent and independent variables in my model in case of a bigger sample.

# 7  LIMITATIONS

As in all studies, this master thesis also has several limitations that may limit its findings and should be considered when regarding the significance of study results.

The major limitation I coped with during this research was limited access to expatriates and their spouses who would be willing to fill in the questionnaire. Since I used a dyadic questionnaire as a means of gathering empirical data and therefore targeted couples to participate, I first had to send an introductory email to appropriate candidates explaining them the research purpose and procedure, and requested them to reply to me in case they had been interested in participating. Only then did I send them the link to the questionnaire, which proved to be time-consuming, but it was the only option for me to be able to link the couples together. A viable solution would be to simply add an extra question requesting expatriates and their spouses to write for example a certain number that would enable me to link them later on. Besides, this would also make it possible that expatriates would forward the link to the questionnaire to other potential respondents, thus enlarging the sample size.

Field (2009) suggests that between 40 and 60 answers are required to compute multiple regression analysis with two predictors in order to obtain reliable results. 37 couples

responded to my questionnaire in total, which makes the sample size sufficiently big to carry out the analysis, but the small sample size, by all means, turned out to be a great limitation for my research and causes that the strength of a multiple regression analysis becomes smaller too. Small sample size obstructed the analysis by itself, but in addition to this, I had to deal with many missing values and non-applicable options, which posed immense challenge during the procedure of hypothesis testing since many respondents did not undergo pre-departure training prior to their departure on non-standard international assignment, which makes the results even weaker. However, bigger sample size would without any doubt give more accurate findings, and results could be better applicable to general population.

Moreover, focusing on couples as a unit of analysis presented a significant challenge during my research since I had many difficulties finding both, expatriates and their spouses to respond to the questionnaire. I received many responses from expatriates who were willing to help me, but unfortunately did not have a spouse, which made them inappropriate candidates. This, in turn, contributed to the smaller sample size.

In addition to that, I allow a possibility that the questionnaire might not be structured in the best possible way. Even though I have studied the literature connected to this topic in advance (Field, 2009; Saunders et al., 2009), I have noticed several imperfections when performing the statistical analysis that might have mislead the respondents and consequently influenced the results. For this reason, I omitted two statements referring to spouse adjustment as I realised that it might not have been clear enough whether higher level of agreement with each of the statements indicates greater or lower level of adjustment.

Last but not least, a wide range of literature and theoretical findings is included in the master thesis, but I still might have overlooked some fundamental work referring to the topic researched.

## CONCLUSION

Non-standard international assignments have gained immense importance in a modern fast-paced and diverse business environment. Globalisation has a great impact on the way multinational organisations conduct their business operations, and expatriate adjustment has become a crucial topic in international business arena. The purpose of my master thesis was to deepen understanding of the factors affecting expatriate adjustment, to raise awareness of pre-departure training significance, and to contribute to the enhanced training methods and practices in multinational organisations, which can consequently facilitate expatriate success on non-standard international assignments. By researching the moderating effect of spouse adjustment, I aimed at shedding light on the importance of spouse adjustment and its consequent influence on expatriate adjustment. Apart from studying extensive literature on the topic concerned I wished to conduct an in-depth empirical study on a sample of expatriates and their spouses to gain realistic insights into

how multinational organisations, expatriates and their spouses perceive and deal with non-standard international assignments. Not only can the results of my empirical study inspire some future research in this field, but can also help that multinational organisations gain critical knowledge in the field concerned and take required steps to provide appropriate pre-departure training for expatriates and their spouses.

Based on the insightful information I gained in the interviews with expatriate spouses and the results of the empirical study, I can reach the following conclusions: a) multinational organisations provide their expatriates with very little pre-departure training; b) expatriate success on non-standard international assignments is primarily attributed to their professional and technical skills and competence, whereby the importance of expatriate adjustment to working and living in a host country is greatly neglected; and c) expatriate spouses are not included in the selection process and do not undergo any form of pre-departure training that would be offered to them from multinational organisations, and are not even aware of the fact that they are playing a significant role in the process of their partners' non-standard international assignment and should therefore be given a considerable attention. However, the study could be repeated and extended to a larger number of expatriates and their spouses in order to obtain generalizable results. Cultural background of the respondents and its influence on their adjustment should be considered as well to provide valuable insights into the topic.

Considering the knowledge and information I have gained on the basis of literature review and my empirical study, I would propose that multinational organisations which are using non-standard international assignments as part of conducting their business operations heavily reconsider their assignment policy. A vast majority of such organisations do have perfected policy for long-term assignments, while non-standard international assignments are usually neglected and not paid much attention to in terms of pre-departure training and expatriate adjustment. Multinational organisations should, by all means, provide pre-departure training to their expatriates embarking on non-standard international assignments, but should strongly consider the specifics of such assignments. As non-standard international assignments vary in nature, duration and host country expatriates are being assigned to, pre-departure training should be adapted to these specifics in order to provide a desired effect.

The content of pre-departure training should be more focused and topic-specific as in comparison to traditional long-term assignments. Prior to sending expatriates to the host country, personnel department should determine the degree of interaction with host country nationals required by the job. Apart from that, cultural differences and cultural toughness of the host country should be determined. Since different non-standard international assignments require different cross-cultural and technical skills, these specifics should be taken into consideration while designing pre-departure training.

Moreover, the content of pre-departure training should be dependent on the type of non-standard international assignment too. Personnel department should regard whether an

expatriate is assigned to one host country only as is the case with commuter or short-term assignments, or an expatriate is a frequent business traveller, implying that he or she is regularly assigned to several host countries with differing cultural contexts. For this reason, pre-departure training should be distinct for each assignment type. Short-term and commuter assignments generally require more specific training content and, as a consequence, culture specific training methods should be offered to expatriates. Frequent business travel, on the other hand, requires more general topics as expatriates are doing business in various cultural settings, and culture general training methods should be provided to expatriates on such assignments.

Besides, multinational organisations should evaluate the level of cultural intelligence of their future expatriates as it has been widely recognised that cultural intelligence is a critical capability that enhances people effectiveness in a culturally diverse environment. As such, cultural intelligence provides insights about individual skills to cope with multicultural situations and to perform effectively in a challenging cross-cultural environment. It could be an extremely helpful tool for designing pre-departure training that would be adapted to an individual needs. Contemporary research has shown that people with higher cultural intelligence require less pre-departure training and, for this reason, multinational organisations should contemplate the use of such tests. As a result, they could offer tailor-made training programs adapted to expatriate's specific needs and competence in order to enhance their performance and facilitate success of non-standard international assignments.

Last but not least, an effective method for enhancing expatriate and spouse adjustment that does not require heavy financial and time investment could be the introduction of a mentorship programme. Multinational organisations could create a pool of expatriates and their spouses who already have experiences with any type of non-standard international assignment. Each future expatriate and his or her spouse could get a mentor assigned to assist them with advice and support, thus contributing to improved adjustment of both, expatriates and their spouses.

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**APPENDICES**

**TABLE OF APPENDICES**

i

## Appendix A: Questionnaire for expatriates

Dear participant,

this research aims at deepening understanding of the factors that affect expatriate adjustment, and at raising awareness of pre-departure training significance for expatriates. Moreover, it desires to emphasize the immense importance of spouse adjustment to the altered living conditions that arise as a result of a non-standard international assignment.

Therefore, I am seeking your help since your participation is crucial for obtaining meaningful data and very much appreciated. I would kindly ask you to take approximately 10 minutes to fill in the questionnaire.

Please note that your responses will be kept strictly confidential and anonymous. You will not be asked to disclose any form of personal identification.

In case you need any additional information I am available on posavec.tina@gmail.com.

Thank you in advance for your help and cooperation.

Best regards,

Tina Posavec

**Research on non-standard international assignments**

Section 1

The following statements refer to the aspects of your living and working in the host country. Please indicate the extent to which you feel adjusted or unadjusted to each aspect given below. Please note the scale range provided.

| | very unadjusted | unadjusted | somewhat unadjusted | neither unadjusted nor adjusted | somewhat adjusted | adjusted | very adjusted |
|---|---|---|---|---|---|---|---|
| Living conditions in general | □ | □ | □ | □ | □ | □ | □ |
| Housing conditions | □ | □ | □ | □ | □ | □ | □ |
| Food | □ | □ | □ | □ | □ | □ | □ |
| Shopping | □ | □ | □ | □ | □ | □ | □ |
| Cost of living | □ | □ | □ | □ | □ | □ | □ |
| Entertainment and recreation facilities | □ | □ | □ | □ | □ | □ | □ |
| Health care facilities | □ | □ | □ | □ | □ | □ | □ |
| Socializing with host nationals | □ | □ | □ | □ | □ | □ | □ |
| Interacting with host nationals on a day-to-day basis | □ | □ | □ | □ | □ | □ | □ |
| Interacting with host nationals outside work | □ | □ | □ | □ | □ | □ | □ |
| Speaking with host nationals | □ | □ | □ | □ | □ | □ | □ |
| Specific job responsibilities | □ | □ | □ | □ | □ | □ | □ |
| Performance standards and expectations | □ | □ | □ | □ | □ | □ | □ |
| Supervisory responsibilities | □ | □ | □ | □ | □ | □ | □ |

Section 2

**I**

A list of training techniques together with their description is given below. Please, indicate the amount of time dedicated to each training technique prior to your departure to international assignment. Note the scale range provided.

| Training technique | Description |
|---|---|
| Factual briefing | Lectures, videos, films or books on geography, climate, economics, politics, customs and traditions of the host country. |
| Role playing | Participants are involved in playing roles similar to those they might encounter in the host country. |
| Critical incidents and cases | Participants analyse critical incidents or cases enabling them to get to know various situations in the business or work environment that might occur during the international assignment. |
| Culture assimilator | Computerised learning approach containing brief descriptions that depict people from different cultural backgrounds interacting with each other together with feedback on what the cultural problem is. |
| Language training | Participants are involved in learning the host language with the emphasis on verbal communication. |
| Stress reduction training | A technique aimed at helping participants cope with stress in the host country. |
| Assessment centre | Involves evaluation techniques, such as different types of job-related simulations, interviews or psychological tests. |
| Field experiences | Participants are sent to the host country to be exposed to the situations they might encounter during the international assignment. |
| Sensitivity training | A technique that strengthens the emotional flexibility and facilitates respect between groups of people of different gender, races or religions. |

| | none | up to 5 hours | 1 day | 2-5 days | 1 week | between 1 week and 1 month | 1 month | more than 1 month |
|---|---|---|---|---|---|---|---|---|
| Factual briefings | □ | □ | □ | □ | □ | □ | □ | □ |
| Role playing | □ | □ | □ | □ | □ | □ | □ | □ |
| Critical incidents and cases | □ | □ | □ | □ | □ | □ | □ | □ |
| Culture assimilator | □ | □ | □ | □ | □ | □ | □ | □ |
| Language training | □ | □ | □ | □ | □ | □ | □ | □ |
| Stress reduction training | □ | □ | □ | □ | □ | □ | □ | □ |
| Assessment centre | □ | □ | □ | □ | □ | □ | □ | □ |
| Field experiences | □ | □ | □ | □ | □ | □ | □ | □ |
| Sensitivity training | □ | □ | □ | □ | □ | □ | □ | □ |

**II**

The same list of training techniques is provided. Based on the scale given below, please indicate the overall effectiveness of such training technique for your adjustment in the host country. Choose the "not applicable" option next to techniques you have not undergone prior to the non-standard international assignment.

| | very ineffective | somewhat ineffective | neither effective nor ineffective | somewhat effective | very effective | not applicable |
|---|---|---|---|---|---|---|
| Factual briefings | □ | □ | □ | □ | □ | □ |
| Role playing | □ | □ | □ | □ | □ | □ |
| Critical incidents and cases | □ | □ | □ | □ | □ | □ |
| Culture assimilator | □ | □ | □ | □ | □ | □ |
| Language training | □ | □ | □ | □ | □ | □ |
| Stress reduction training | □ | □ | □ | □ | □ | □ |
| Assessment centre | □ | □ | □ | □ | □ | □ |
| Field experiences | □ | □ | □ | □ | □ | □ |
| Sensitivity training | □ | □ | □ | □ | □ | □ |

Section 3 – demographic data

Please, indicate the total amount of time you have lived in a foreign country so far.

Total time spent abroad [                    ]

Do you feel comfortable in a multicultural environment?

☐        never

☐        rarely

☐        sometimes

☐        often

☐        always

Please, indicate your gender.

☐        male

☐        female

Please, write your age.

[                    ]

Please, write your nationality.

[                    ]

Please, write your current position in the organisation.

[                    ]

Please, indicate type and duration of your non-standard international assignment. Use the given table for reference.

| Type of the assignment | Description |
|---|---|
| Short-term assignment | Relocation abroad for a period of less than a year |
| Commuter assignment | The person commutes from a home country on a weekly or bi-weekly basis to the place of work in another country, while the family remains in the home country. |
| Frequent business travel | Trip due to fulfilling tasks and duties outside of employee's place of living or working |

Type of non-standard assignment

Duration of non-standard assignment

You have completed the survey. Thank you very much for your participation!

## Appendix B: Questionnaire for expatriate spouses

Dear participant,

this research aims at deepening understanding of the factors that affect expatriate adjustment, and at raising awareness of pre-departure training significance for expatriates. Moreover, it desires to emphasize the immense importance of spouse adjustment to the altered living conditions that arise as a result of a non-standard international assignment.

Therefore, I am seeking your help since your participation is crucial for obtaining meaningful data and very much appreciated. I would kindly ask you to take approximately 10 minutes to fill in the questionnaire.

Please note that your responses will be kept strictly confidential and anonymous. You will not be asked to disclose any form of personal identification.

In case you need any additional information I am available on posavec.tina@gmail.com.

Thank you in advance for your help and cooperation.

Best regards,

Tina Posavec

**Research on non-standard international assignments**

Section 1

The following statements describe possible situations a spouse might encounter during his or her partner's non-standard international assignment. The term non-standard international assignment includes relocations abroad for a period of less than a year, frequent business travels and commuter assignments (the person commutes from a home country on a weekly or bi-weekly basis to the place of work in another country, while the family remains in the home country).

Please, indicate to what extent you agree or disagree with each of the statements below. Note the scale range provided.

| | strongly disagree | disagree | neutral | agree | strongly agree |
|---|---|---|---|---|---|
| You have to learn to be alone for some time. | ☐ | ☐ | ☐ | ☐ | ☐ |
| Being able to keep in touch via Skype is very beneficial. | ☐ | ☐ | ☐ | ☐ | ☐ |
| My daily life does not change much because (s)he is very busy even when (s)he is at home. | ☐ | ☐ | ☐ | ☐ | ☐ |
| It takes a lot of energy. | ☐ | ☐ | ☐ | ☐ | ☐ |
| When (s)he is away, I have less social life since it is in his/her domain. | ☐ | ☐ | ☐ | ☐ | ☐ |
| I do not miss him/her when it comes to household chores since I usually do them. | ☐ | ☐ | ☐ | ☐ | ☐ |
| This way of life has even increased my self-confidence and self-reliance. | ☐ | ☐ | ☐ | ☐ | ☐ |
| I find it interesting to see how this way of life affects me. | ☐ | ☐ | ☐ | ☐ | ☐ |
| I have not taken up any new activity in this period. | ☐ | ☐ | ☐ | ☐ | ☐ |
| When (s)he is absent, I do not go to the cinema, to the theatre or to visit our friends alone. | ☐ | ☐ | ☐ | ☐ | ☐ |
| I miss the feeling that you share your life and time with someone. | ☐ | ☐ | ☐ | ☐ | ☐ |
| I cook more rarely since I can eat at work. | ☐ | ☐ | ☐ | ☐ | ☐ |
| You have to reorganise your life anew. | ☐ | ☐ | ☐ | ☐ | ☐ |
| You see that you can handle things alone. It is a path to greater independency for me. | ☐ | ☐ | ☐ | ☐ | ☐ |

continued

| | strongly disagree | disagree | neutral | agree | strongly agree |
|---|---|---|---|---|---|
| We undertake the majority of social activities together when (s)he comes back home. | □ | □ | □ | □ | □ |
| I feel even more independent and self-confident because I see that I would be able to manage everything what (s)he usually does. | □ | □ | □ | □ | □ |
| It is a constant work on the relationship with him/her. | □ | □ | □ | □ | □ |
| If (s)he is absent for a longer period, I call my old friends. Those we have been friends for a long time, but usually do not have time to socialize. | □ | □ | □ | □ | □ |
| Children can maintain contact with a parent due to technology, which makes it a lot easier. | □ | □ | □ | □ | □ |

Section 2 – demographic data

Please, indicate your gender.

□ male

□ female

Please, write your age.

Please, write your nationality.

You have completed the survey. Thank you very much for your participation!