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The Reviewer from Hell

Many of us have encountered this reviewer, especially my senior colleagues. In the 1980s, when many of us started our publication careers, it seemed that reviewers perceived that it was their duty to stop manuscripts from being published. Eventually, both authors and editors realized that such an attitude was not in their best interest and developmental reviews started to gain ground. But the “Reviewer from Hell” can occasionally still be encountered. One way such reviewers operate is to start with an avalanche of criticism and when the author has worked tirelessly to address all of that, the reviewer responds by launching a completely new critique, focussing on concerns not mentioned during the first round of review. And this spiral of unending criticism goes on and on. At this point, it is the job of the editor to stop this charade and make a completely independent publication decision.

Fortunately, JGM reviewers originate from Heaven rather than from Hell. Developmental reviews are an essential cornerstone of the editorial policies of this journal. Many of our authors can bear witness to the substantial improvement of their manuscripts after going through the revise and resubmission process. Some of their statements can be found on the JGM website: http://emeraldgrouppublishing.com/products/journals/journals.htm?id=jgm

A new feature of JGM is an editorial review board (ERB) of dedicated specialists within our area performing highly developmental reviews. This is also done in a prompt and timely fashion, underlining the JGM policy of a one-month turnaround time for the first submission of a manuscript until a decision is made. That probably makes the journal the fastest in our area. Since JGM is the only academic journal to consistently and exclusively focus on global mobility and expatriate management, the slogan that JGM is managed “by experts for experts” becomes ever more true by introducing an expert ERB. Since the journal was launched, the editorial advisory board of JGM reads as a “who’s who” in our area and the editorial team and authors are also all specialists.

Recognized as a fast-developing newcomer, JGM went straight into the No. 2 level of the Chartered Association for Business Schools (CABS, UK) Academic Journal Guide 2018. Before this, JGM was indexed in Scopus (CiteScoreTracker February 2018: 1.91) and ESCI. The journal is also ranked by the Australian ABDC List as a B journal and ranked by the Nordic countries and Brazil.

Two special issues are scheduled for this year: “The dark side of global mobility” edited by Benjamin Bader, Tassilo Schuster, Anna Katharina Bader, and Margaret Shaffer and “Low status expatriates” edited by Chris Brewster, Washika Haak-Saheem and Jakob Lauring.

The journal is also involved in social media featuring JGM-associated content. We have a JGM LinkedIn Group, a JGM Facebook Group (please contact Yvonne at: ymcnulty@expatresearch.com if you want to join) and a Twitter account, @JanSelmer_JGM.

Despite its specialist emphasis, JGM publishes a variety of rigorous research methods, thorough theoretical developments and focussed literature reviews. We also welcome multi-level studies and research from a variety of academic domains, as well as cross-disciplinary studies.

Unlike many other academic research journals, JGM welcomes replication studies. We believe that, as important that it is for science to break new grounds, previous discoveries must be examined again to reaffirm or disconfirm their existence. Replication studies can be of various forms, where previous results are investigated with same or different methodologies and settings as well as providing the extensions of primary research.
In this issue
The first article, authored by Lai Wan Hooi, explores the factors needed for the development of global human resources for leadership assignments in foreign subsidiaries to enhance the expatriate mission accomplishment rate. Eight senior HR managers in three financial institutions in Taiwan were interviewed and data from 28 expatriates in their overseas subsidiaries were collected by e-mail. Results indicated that organizational policies do not focus on developing global human resources. Instead, the focus is on staffing overseas subsidiaries with foreigners and Taiwanese that can speak English. While there was limited preparation of staff for expatriation, organizational policies that favoured those that were not expatriated, in terms of career progression, motivated managers to avoid international assignments. Authored by Adam Potter and Christopher Richardson, the second article suggests how ethnographic research can help conceptualize expatriate acculturation. By doing so, it increases our understanding of the expatriate’s position in relation to host country nationals, informing selection criteria, cross-cultural training programmes and support plans as they pertain to specific international assignments. The proposed PGM model highlights the value of host country national’s culture and preferences as input for selection and cross-cultural training of an expatriate worker and contributes to the body of literature that views expatriation with multiple stakeholder perspectives. The third article in this issue, written by Diana Farcas and Marta Gonçalves, aimed to develop a model of cross-cultural adaptation for emerging adult self-initiated expatriates (SIEs). Data were collected from interviews with 18 Portuguese SIEs, aged between 18 and 29 years, residing in the UK. Five dimensions of cross-cultural adaptation were identified (cultural, emotional, social, practical and work), along with 18 determinants related with four different levels: personal, interpersonal, societal and situational. This is the first model which was inductively developed, enabling a broad understanding of emerging adult SIEs’ cross-cultural adaptation, in terms of what constitutes and influences it. Written by Tinashe Timothy Harry, Nicole Dodd and Willie Chinyamurindi, the fourth article deals with self-initiated academic expatriates (SIAEs) in South Africa. The study used an interpretivist approach and data were collected through unstructured interviews of 25 SIAEs within South Africa. Through the stories and narratives, their expatriation experience seemed challenging. Their experiences were grouped into life and career experiences. The life experiences consist of immigration difficulties, family separation, social adjustment difficulties and unavailability of accommodation. Career experiences included remuneration differences, gender discrimination, limited professional development opportunities and communication difficulties. The findings are fundamental in understanding this neglected group in the extant literature and also assist in proposing possible solutions to these challenges. The fifth paper in this issue, authored by Joanne Mutter and Kaye Thorn, explores the career of the stay-at-home partner. The article examines the case where the expatriates travel for their career, while the partners are left behind. Based on semi-structured interviews with the partners of international yachtmen, findings highlight the prioritization of the traveller’s career which could be detrimental to the career of the partner. The authors identify a new dual-career strategy; the entrepreneurial secondary career strategy, which may have the flexibility required to manage both work and family demands, and allow partners to enact their authentic career. The last article in this issue, written by Svala Gudmundsdottir, Thorhallur Orn Gudlaugsson and Gylfi Dalmann Adalsteinsson, investigates the relationship between adjustment, social support and satisfaction with life for expatriate spouses. Based on a sample of 268 European diplomatic spouses, residing all over the world, the findings reveal a significant relationship between adjustment and emotional and instrumental support as well as satisfaction with life. Since little is known about diplomatic spouses, the results will be an important first step for foreign ministries within Europe to improve their expatriate programmes and policies.
By establishing the ERB, the “Reviewer from Hell” is effectively banned from *JGM*. Instead, you can expect to encounter the “Reviewer from Heaven”, delivering highly developmental reviews in a prompt and timely fashion and facilitating your path to a favourable publication decision of your important manuscript. In other words, you are supported by a dedicated team of specialists making our motto for *JGM* a reality; managed by “experts for experts”. Hence, the new ERB contributes to establishing *JGM* as the leading outlet for academic research on global mobility and expatriate management.

Jan Selmer
Global human resources: a key to mission accomplishment

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Abstract

Purpose – The purpose of this paper is to explore the factors needed for the development of global human resources for leadership assignments in foreign subsidiaries. The paper aims to find an answer to enhance expatriate mission accomplishment rate at subsidiaries abroad.

Design/methodology/approach – This study examines the development of global human resources. In-depth face-to-face interviews were employed to collect data from eight senior HR managers in three financial institutions in Taiwan, while data from 28 expatriates in the overseas subsidiaries were obtained from asynchronous e-mail interviews. Conventional content analysis was used to code categories directly from the data.

Findings – The results of the study revealed that organizational policies do not focus on developing global human resources. To portray a global image, the focus is on staffing overseas subsidiaries with foreigners and Taiwanese that can speak English. Development to prepare staff for expatriation is limited to pre-departure training that focused mainly on language and cultural awareness training. However, organizational support during expatriation and repatriation is important. Expatriates view security briefing crucial and familiarization visit helps them to decide whether or not to accept expatriation. Organizational policies favor those that were not expatriated in terms of career progression deter managers from accepting international assignments.

Originality/value – It highlights some best practices in developing global human resources taking into consideration the herd mentality and social perspective. Social support, social learning and social capital are instrumental in developing global human resources as these hasten cultural adjustment.

Keywords Expatriates, Taiwan, Best practices, Financial services industry, Global human resources, Mission accomplishment

Paper type Research paper

Introduction

Researchers and practitioners in global talent management are interested in understanding the different facets that affect expatriate’s success. The level of stress and integration into the new cultural milieu, expatriate’s personal characteristics, organizational support (parent and host) and preparation for expatriation are equally important for mission accomplishment (Aycan, 1997). Aycan (1997) argued that expatriate adjustment is associated with both individual (managerial resourcefulness, acculturation attitudes, personality dimensions and coping strategies) and organizational (organization’s international structure, value orientation, organizational life-cycle, diversity training, strategic planning and socialization) factors. In fact, most research on expatriation focuses on individual factors rather than organizational factors that predict expatriate adjustment and performance (Aycan, 1997). A few other studies have identified certain factors but in different contexts. For instance, Singh and Mahmood (2017) focused on cultural adjustment, social and emotional competencies in the ICT sector in Malaysia while Liu and Shaffer (2005) studied the effect of social capital on expatriate adjustment and performance of expatriate managers working in Hong Kong, Beijing and Shanghai.

This paper extends previous studies on expatriate adjustment and performance by integrating organizational policies in developing global human resources. Examining the process of developing global human resources is important as it provides an insight of the
effectiveness of development practices that foster expatriate adjustment. Swift and successful expatriate adjustment mitigates the premature return of expatriates (Black et al., 1991; Copeland and Griggs, 1985; Graf, 2004; Stroh et al., 2000), and this is important as it affects company’s reputation, business opportunities and market share (Black and Gregersen, 1991; Naumann, 1992). Moreover, successful expatriation is likely to boost the self-esteem, confidence and morale of the expatriate (Langinier and Froehlicher, 2018; Stroh et al., 2000). Despite the importance of this relationship, the literature remains silent in the Taiwanese context. Hence, this study is judicious, as it highlights the appropriateness of existing policies and best practices in developing global human resources that foster mission accomplishment in overseas subsidiaries, and attracts (Bolino, 2007) as well as retains high-performing employees (Bossard and Peterson, 2005). Global leaders are a source of competitive advantage for global companies (Caligiuri, 2006) as they are able to steer diverse teams to achieve missions abroad.

As one of “the little dragons,” Taiwan is moving from rags to riches and is among the world’s wealthy industrial countries (Hofstede, 1993). Since the 1960s, Taiwanese companies have invested significantly abroad (Hsiao and Hsiao, n.d.). Taiwanese investment in the new millennium continued to grow at an increasing rate, specifically into emerging markets. With this surge in investment for Taiwanese businesses in Southeast Asia came the opportunity for Taiwanese banks. With the introduction of the New Southbound Policy, which aims to strengthen the comprehensive trade and economic ties between Taiwan and members of the Association of Southeast Asian Nations, South Asian countries, as well as New Zealand and Australia, overseas Taiwanese businesses are likely to increase and substantially impact the economic development of the region.

While this is a positive business trend, the current era of globalization has increased the complexity of doing business due to multiplicity, growing interdependence among countries and ambiguity across borders (Shiraki, 2015). Taiwanese banks have long played a prominent role in providing Taiwanese organizations funding for overseas expansion (Fulco, 2016). As Taiwanese banks expand in Southeast Asia, not only do they face fierce competition from local banks, but also a number of new operational, managerial and human resources development challenges. For instance, Taiwanese banks require a cross-border platform encompassing global talents to operate in cross-border businesses (Morley et al., 2015).

Moreover, certain specialized expatriate positions may require transferring suitable and competent employees to operate in the overseas subsidiaries (Singh, 2010). Hence, prior to expatriating suitable employees to subsidiaries abroad, it is essential to develop employees (Caligiuri and Bonache, 2016) to be technically competent, possess interpersonal skills and cultural sensitivity as well as various other characteristics (Sidani and Al Ariss, 2014). It requires establishing an expatriation process to further develop a global talent pool to operate in its foreign subsidiaries (McNulty and De Cieri, 2016). However, current research on a comprehensive expatriation process in Taiwanese banking subsidiaries in the Asian countries is very limited and not maturely developed. This situation leads to the question of how organizations can develop global human resources to accomplish missions in foreign subsidiaries.

Indeed, for organizations to leverage globalization to enhance competitive advantage, possessing global human resources (human resources with a global perspective, a global network and the ability to operate globally) is crucial. Global human resources encompass decision-makers at the headquarters on global issues, their successors, and the expatriates in overseas subsidiaries (Shiraki, 2015). With a global mindset, these people have the capability, commitment and chemistry to be effective in their expatriate assignments. The main goal of the study is to explore the development of global human resources and propose best practices to enhance mission accomplishment rate at foreign subsidiaries. Based on Aycan’s (1997) definition of expatriate failure (premature return and inadequate performance), mission accomplishment in this study encompasses the successful completion of expatriation and adequate performance (accomplishment of tasks). This study contributes to the existing
literature by providing a greater understanding of how organizational policies influence expatriates in global service firms. To date, there is no study doing exactly what this study aims to achieve.

Expatriates and organizational policies

In today’s global economy, it is a competitive necessity to have a workforce that is competent globally. As global organizations expand its borders, more professionals are sent abroad but the cost involved can be twice or thrice to that of a similar local position (Black and Gregersen, 1999). Moreover, according to their study, some returned early or did not perform as expected. Others who completed the assignment left within a year to join a competitor. In order to mitigate this, organizations should put in special efforts on expatriate assignment process. For instance, it is best to tailor training programs in accordance with the culture of the foreign subsidiary as practices may vary due to cultural differences. The views of the expatriates need to be taken into consideration before, during and after expatriation (Baruch et al., 2002). Repatriates need help to buffer the reverse culture shock. Therefore, it is crucial that special attention be given to repatriation as well as repatriation. A global assignment’s unique personal and professional challenges have to be well thought out to enhance expatriates’ capabilities to capture strategic opportunities.

Successful expatriation emphasizes on knowledge creation – to generate and transfer knowledge (Gupta and Govindarajan, 2000), global leadership development and high cultural intelligence. Effective expatriate management focuses on sending the right staff abroad with sustainable business in mind. Expatriating staff is not all about rewarding or punishing people, but rather “to fill a burning business need” (Black and Gregersen, 1999, p. 3). It goes beyond an immediate business problem. Expatriates are there to lead and innovate through mutual sharing of knowledge and skills. Global leaders need to have a widened view of the world. Their mental maps have to adapt to the new environment and this could be achieved through working in that unchartered territory for a sustained period. This improves their cultural intelligence, which is imperative for maneuvering from one culture to another. Hence, organizations should seek to nurture expatriates to be culturally flexible, socially competent, enthusiastic and extroverted communicators, cosmopolitan oriented and collaborative in their negotiation style. This concurs with some of Dickmann et al.’s (2008) criteria of broadened knowledge, diverse cultural competencies, broad-based sociability, determined and visionary personality, outstanding skills and educational qualifications as well as good health, inspirational, resourceful and team-oriented.

Therefore, it is desirable that organizations design a method for assessing employees’ cultural aptitudes to avoid expatriating the wrong person. Moreover, specific training courses can be developed to prepare them for expatriation as well as enhance their strength and overcome their weaknesses. This may be in the form of a personalized development plan and timetable. Expatriate failure is lower if they are given time to enhance their cross-cultural skills and prepare for global assignments. Cautiously, organizations may provide opportunities for young recruits to be assigned for short international assignments, which is less costly. A series of short training stints potentially enhances expatriates’ overseas experience. In essence, it is best to have a systematic way of gauging the cross-cultural aptitudes of future expatriates.

Returning expatriates ought to be given career guidance to help them transfer their international experience. Disappointment is inevitable if expatriates do not have an opportunity to apply their new skills and knowledge or given due recognition. Having run a foreign subsidiary, it is difficult for them to play a second fiddle to others. This is further aggravated by changes in professional and personal life. However, the shock can be mitigated if organizations give some thought to returning expatriates a few months before repatriation and assign them an appropriate position. In particular, returning expatriates felt valued
and fairly treated if they participated in the repatriation programs. Active job–person matchmaking process and a debriefing interview a few months before repatriation are some ways to avoid losing returnees to competitors and reap the true value of international assignments.

Theoretical background
The complexities involved in global operations and poor human capital management can result in business failures in the international arena. Therefore, the development of effective and competent expatriates for cross-cultural adjustment on overseas assignments is a central concern for most global companies (Dowling, 2008). As organizations move employees across borders to enable global growth, developing effective global human resources is critical for overall organizational success. Expatriate assignments may throw up many challenges, such as psychological, socio-cultural and work challenges (Haftah et al., 2007), and therefore, it is vital that the HR department provides sufficient quantity and quality training (Chen and Chang, 2016) for employees who have been identified for expatriation. Training not only covers the aspect of business, but also other aspects, such as cultures, lifestyle and technology. The bottom line is that global human resources are more likely capable of transitioning from a context of familiarity (home country) to one of the greater novelty (host country). Feitosa et al. (2014) asserted that cultural intelligence, learning orientation, technical KSAOs, language skills, environmental and training factors are crucial factors for expatriate adjustment. This study considers cultural diversity, knowledge management, social and emotional competence, human resource development designs and willingness for expatriation as crucial factors that need to be taken into consideration for developing global human resources in organizations. The importance of these is further discussed below.

Cultural diversity
Cultural diversity presents great challenges for expatriates. Cultural differences in personal and professional settings challenge expatriates’ ability to function effectively in their new environment. The most common challenges that have positively affected the performance and adjustment of expatriates are cross-cultural training and language training (Sousa et al., 2017). Expatriates, especially those relocating with families, should fully understand local customs and taboos as well as know-how to interact socially. Though cultural distance moderates the relationship between cultural intelligence and expatriate adjustment, Zhang (2012) opined that increasing cultural distance, that is, cultural dissimilarity between host and home culture increases adjustment difficulties. Therefore, due to cultural differences and the significant role of adjustment to a new environment in the success of an international assignment (e.g. Black and Gregersen, 1991; Caligiuri, 1997; Copeland and Griggs, 1985), global organizations need expatriates who are culturally intelligent (Ang et al., 2007).

Indubitably, their comfort in the new cultural environment can be continuously tested (Molinsky, 2007). The challenge has been how to develop a pool of expatriate managers who are capable of adjusting quickly to new cultural environments (Earley and Ang, 2003; Selmer, 2010). In this, the HR department needs to fully disclose the culture of the country. Besides, expatriates need a thorough knowledge of host country’s laws, particularly, labor laws. An understanding of what is deemed good leadership qualities in the host country will also help to prevent any potential issues working with people of a different culture. Lin and Wei (2005) attested that expatriates with managerial positions have a significant influence on expatriate premature return and company sales. Though training is deemed to be a cost rather than an investment in organizations that adopt Confucian human resource practices (Chen and Ahlstrom, 2017), continuous training should be provided even during expatriation so that expatriates stay updated on company policies and mitigate any problems that may arise.
Knowledge management
For sustainable competitiveness, global organizations need the right talent and strategies for international management. Expatriates can be a source for sustained competitive advantage (Pfeffer, 1994; Prahalad, 1983) and, therefore, organizations may consider enhancing the knowledge, skills and abilities of expatriates needed for the ultimate success of their organizations (Stroh and Caligiuri, 1998b). Training and development programs can be tailored to meet those needs. Knowledge is critical to make MNCs run efficiently (Davenport and Prusak, 1998) and expatriates play an important role in transferring that knowledge. Hence, expatriates with good knowledge management skills could possibly be a key source of competitive advantage.

As the success of expatriate assignments depends on both the performance of the expatriates and host country nationals, expatriates must be competent in developing the capacity of local staff (Hocking et al., 2004, 2007) as well as reverse knowledge transfer, that is, acquiring local knowledge and sharing it with other units (Li and Scullion, 2010). Moreover, Li (2012) emphasized that mentoring practices effectively affect employee knowledge-sharing and innovation behavior. Therefore, it is imperative that organizations recognize the central role of productive knowledge-sharing relationships between individual expatriates and host country nationals. Moreover, individual expatriates develop best when they have frequent interpersonal interaction with host nationals. Nonetheless, this depends on the openness, sociability and emotional stability of the individual expatriates (Caligiuri, 2000).

As expatriate assignments, in particular, have been identified as an important global knowledge transfer strategy (Hocking et al., 2004; Ruisala and Suutari, 2004), organizations could leverage expatriates’ knowledge management capability for organizational success. As effective intercultural knowledge-sharing relations incorporate relationship building, reciprocal learning and co-construction of knowledge (Heizmann et al., 2018), organizations may scrutinize more closely the social processes and practices involved in developing productive knowledge-sharing relationships when preparing global human resources.

Social and emotional competence
Organizations with globally competent employees definitely have a comparative advantage. Singh and Mahmood (2017) in their study on 301 expatriates in the ICT sector in Malaysia affirmed that social and emotional competencies have a significant impact toward job performance while cultural adjustment mediates the relationship. The social exchange theories argue that social interactions that are considered fair and discretionary would foster a psychological obligation to reciprocate (van der Laken et al., 2016). Social and emotional competencies can influence the interpersonal effect of host country nationals, which then affects their willingness to offer role information and social support to expatriates (Varma et al., 2016). Similarly, Liu and Shaffer’s (2005) study on 147 expatriate managers working in Hong Kong, Beijing and Shanghai reveals that social capital variables are strong predictors of expatriate performance though relatively weak for cultural adjustment. According to the social capital theory, expatriates draw resources from their professional social networks (Lin, 1999) such as assistance, emotional support, task assistance, information, visibility, legitimacy and/or sponsorship (Langmier and Froehlicher, 2018; Seibert et al., 2001) to behave effectively in their new cultural and work environment by observing and interacting with their social ties (Aycan, 1997; Black et al., 1991; Caligiuri, 2000).

Human resource development designs
Due to intercultural differences, organizations may need to design cross-cultural approaches to develop global human resources to facilitate expatriates’ cross-cultural adjustment.
Shah and Barker (2017) suggested making cultural norms explicit by embedding a cultural learning framework in cross-cultural training programs. Drawing on the social learning theory (Bandura, 1977), Michailova and Ott (2018) postulate that learning is governed by attention (notice the behavior), retention (the modeled behavior is coded into memory) and reproduction (reproduce the behavior), which are influenced by motivation, incentives and consequences. Through continuous and reciprocal interactions, expatriates can develop the processes of “learning to learn another culture” (Bell and Harrison, 1996, p. 53) to interact effectively in future cross-cultural interactions. Expatriates can learn from other business professionals, other expatriates and host country nationals (Langinier and Froehlicher, 2018). Through practice they can then reproduce and perfect the observed behaviors that are necessary in the new environment.

Willingsness for expatriation

Research has also indicated the importance of expatriate willingness to accept expatriation in order to accomplish mission abroad (e.g. Kim and Froese, 2012). Hence, organizations need to factor in this aspect in developing global human resources. Expatriate development programs could be customized to meet expatriates’ expectations of expatriation if antecedents of employee’s willingness to accept expatriate job offers were identified. There is a broad taxonomy of motivating factors influencing the decision, but these are mainly rooted in the individual’s personal characteristics, career attitudes, country or location, the new or previous task and position and few minor other reasons (Hippler, 2009). de Eccher and Duarte (2018) suggested that country image plays an important role in influencing the willingness to accept expatriate job offers, though country image depends on individuals’ background and social identities. The findings of their study reveal a strong association between the perceived level of safety and cultural attraction and the willingness to accept expatriate job offers. Language proficiency also influences the evaluation of specific expatriate locations.

In a nutshell, organizations have to give more thought in developing human resources for global assignments. This includes a comprehensive and tailored approach to fostering among others, the factors discussed above. A profound understanding of cultural diversity is crucial as expatriate managers have to work with, collaborate, communicate, negotiate and cooperate with people of different cultural backgrounds (Ayoun et al., 2010; Mendenhall and Stahl, 2000) as cited in Lee (2016). Knowledge management is important as it provides multinational companies with a competitive edge. Expatriate managers, therefore, have to be competent in knowledge management as they act as boundary spanners or bridges in the transference of knowledge (Hsu, 2012). Likewise, social and emotional competences are essential for expatriates to participate socially and professionally effectively. Similarly, human resource development designs that are contextually tailored likely expedite the readiness for expatriation. These enhance cross-cultural adjustment and mitigate expatriate failure. Moreover, willingness for expatriation is crucial as it is an important predictor of expatriate success (Kim and Froese, 2012).

Methodology

The main aim of the study is to understand how organizations develop their human resources to assume expatriate positions in their foreign subsidiaries. This motivation is a result of difficulties some Taiwanese banks faced in enticing managerial staff to enroll in global human resources development programs and to take up expatriate positions in their overseas subsidiaries. To achieve this objective, the study employed a two-phase approach in the fieldwork. The first phase consists of in-depth face-to-face interviews with the human resource personnel of each bank while the second phase involves asynchronous e-mail interviews with the expatriates in the overseas subsidiaries. These individuals are
knowledgeable in that they are conversant in the area of study (Gioia et al., 2012) and can provide relevant insights. The main intent of the interviews with the HR personnel was to capture their perspective of developing global human resources. The perspectives of the expatriates in the overseas subsidiaries provided an insight of whether their perceptions were aligned with the policy makers.

Site and subjects
A total of six major financial institutions in Taipei were identified for the study. After several e-mails and telephone calls to the headquarters of these financial institutions, three prominent banks gave their consent. The vice president or senior HR manager of the financial institutions assisted in identifying the participants that could provide information on the policies related to global human resources. For the first phase, eight senior HR managers from the headquarters who were directly involved in managing international assignments provided insights on developing global human resources at the organizational level. To obtain a representative view, the diversity of the participants was taken into consideration. Hence, the participants consisted of equal number of males and females across six age groups ranging from more than 25 to more than 50 years. The number of participants with and without expatriate experience was the same though there was much variation in the number of years of working experience. All the participants must have a master’s degree in HR-related discipline as they were likely able to understand the scope of the study better.

The individual perspective for the second phase was obtained from 28 Taiwanese expatriates based in various foreign subsidiaries in Asia (Singapore, Japan, Cambodia, Shenzhen, Shanghai, Hong Kong, Laos, Malaysia, Myanmar, Philippines, Thailand and Vietnam) and Australia. Their ages ranged between 25 and more than 50 and they represented all six age groups. As for marital status, half of the participants were single while the rest were married. The HR department at the companies’ headquarters helped in identifying the Taiwanese expatriates to be interviewed. The HR personnel has been advised to select a diverse range of expatriates in terms of sex, age, position, education level, years of working experience, expatriation experience and country base to have a better insight from different perspectives. The main aim was to encapsulate multiple perspectives of the same phenomenon and to triangulate the views at the organizational and individual level to establish whether there was a mutual understanding between management and the expatriates. Only 28 expatriates were interviewed as further interviews were deemed unnecessary when no new themes emerged. Table I summarizes the demographic details while Table II outlines the data collection details.

Procedure
With the help of a research assistant, the author who has experience of in interviewing a wide range of research contexts conducted the interviews on a mutually agreed date and time at the bank’s premise. Before conducting the interview, efforts were made to establish rapport with the participants. Confidentiality to the participants was assured and each participant gave their signed consent to be interviewed. Permission was also obtained to audio record the interview using a recorder and a mobile phone. Each face-to-face interview lasted between one-and-a-half and two hours. Throughout the interview, probing questions were asked to confirm the understanding of what is being conveyed. Attention was also given to nonverbal cues. Soon after the interview, the recordings were transcribed verbatim by both into written form. Notes taken during the interviews were summarized.

For the second phase, the expatriates in the overseas subsidiaries were contacted in advance before the asynchronous e-mail interviews. The theme, the purpose, general outline, method and details of the study were explained to each of the participants. They were then given a week to respond to the questions. Follow-up e-mails were sent to the participants to
verify certain interpretations and emerging themes from the data analysis. In line with transparency, the interview transcripts for both phases were sent back to the participants for verification and feedback (Bansal and Corley, 2011). This “participant checking is to ensure the validity of the transcribed data and evolving interpretations.
Guba and Lincoln (1989, p. 239) asserted that this offers “the single most crucial technique for establishing credibility.” All research-related activities and data including audio recordings, transcripts and notes were carefully documented.

Measures
Primary qualitative data were collected through semi-structured interviews. In total, 18 questions were designed to tap data related to developing global human resources. Before finalizing the interview questions, a senior academic and a HR practitioner verified the wordings and sequence of the questions. Both phases of the interview started off with general questions pertaining to the distinction between human resources and global human resources. The main aim was to understand employees’ awareness of being global and the organizations’ emphasis on globalism. More specific questions were then asked regarding developing global human resources for mission accomplishment. These questions encapsulated the perspectives of both the senior HR managers and Taiwanese expatriates on issues related to recognition of global human resources, global human resource development policies and best practices in developing global human resources.

Analysis
Conventional content analysis was used to code categories directly from the data that were collected from the face-to-face and asynchronous e-mail interviews (Hsieh and Shannon, 2005). The process began by reading the transcribed data repeatedly and analyzing the written notes to attain a sense of the whole (Tesch, 1990). Using a bottom–up approach (Shepherd and Sutcliffe, 2011), coding categories were derived directly from the content of the text data through first, open coding and then, axial coding to develop second-order themes. Each part of the transcripts was assigned to one or more appropriate codes. The categories were roughly defined initially but were refined as the analysis progressed. Dominant themes were sub-categorized while less dominant themes were merged as they exemplified a shared theme. This follows Hammersley and Atkinson’s (1997) notion of “progressive focusing.” The data were meticulously analyzed so as to capture contrasting and minority views as well. After several readings of the contents, emerging themes and the relationships between them as well as illustrative quotes from each transcript were determined. The final stage of the data analysis involved categorizing the codes into three central themes, namely, recognition of global human resources, global human resource development policies and best practices in developing global human resources.

The financial service industry in Taiwan
Generally, Taiwan’s banking sector is healthy, tightly regulated and competitive, with 39 banks servicing the market. Typically, small Taiwanese banks used to focus on the domestic market, which is fragmented, with predominantly small players. In general, Taiwan’s domestic market concentration in the banking sector is too low to compete in the global marketplace. The nation’s largest domestic bank, the wholly state-owned Bank of Taiwan, which has $154bn in assets, ranks No. 163 globally. Together with the next two largest banks, the state-controlled Taiwan Cooperative Bank ($101bn in assets) and Mega Bank, the domestic market share of 24.7 percent is far below Singapore’s 94.2 percent and Hong Kong’s 60 percent, and even lower than the USA’s 42.3 percent. Taiwanese eight state-controlled banks jointly held nearly $710bn, or 50 percent of the banking sector’s total assets (State Department’s Office of Investment Affairs, 2017).

The Taiwanese banking system is mostly deposit funded and has a little exposure to global financial wholesale markets. The offshore banking units have been in operation since 1983, but the overall competitiveness of the industry is inadequate, which further limits the
potential for banks to expand abroad. Regulators have encouraged local banks to expand to overseas markets, especially Southeast Asia, and to minimize exposure in China (State Department’s Office of Investment Affairs, 2017). However, the inability of non-government banks to build up scale at home makes it hard for them to expand abroad. The way forward is to consolidate and transform the Taiwanese banking sector through mergers within the private and public sectors. Domestic consolidation is necessary for overseas expansions, as it is rare for a financial services company that is not big domestically making it big internationally (Flannery, 2009).

Generally, the Taiwanese domestic market consolidation is very slow, mainly because the government banks still account for 50 percent of the market share. Comparatively, Taiwan is the most fragmented banking market among all the Asian countries probably because Taiwan went through the Asia financial crisis relatively unscathed. Hence, it missed the opportunity to consolidate or strengthen its financial services industry. Though it is believed that privatization of the banking sector may enhance the power of private banking families, especially since the leading financial banks are still family controlled, experts opined that the banking industry needs consolidation to remain competitive (Flannery, 2009). Considering the above scenario, having global human resources can possibly enhance the competitiveness of offshore banks as these expatriates have the capacity to adjust swiftly to be effective in their new jobs.

Results
Recognition of global human resources
Axiomatically, the financial services industry in Taiwan like many other industries are moving in tandem with globalization – expanding their boundaries abroad and adopting a more global perspective. Despite this, there seems to be some confusion as to what being truly globalized is. Indubitably, the participating companies recognize the need to be global to remain competitive in the market. But, there is no clear distinction between human resources and global human resources in all the participating companies. Despite operating globally, these companies do not place much emphasis on the importance of globalizing their employees, i.e., having human resources with a global perspective, a global network and the ability to operate globally. Being global means being proficient in English and having foreign staff in the organization. Staffing foreigners in overseas subsidiaries is a way to convince others, especially the CEO and the board of directors, that the company is going global. Moreover, Taiwanese expatriates working along foreign staff have to communicate in English in their daily operations. Nonetheless, some foreigners are recruited for their expertise, as talent is crucial for sustainable competitiveness:

We want the staff to know that we are international […] we want to be the top one in the Asia Pacific […] we still need experts in specific field […] (HR4).

Even though hiring foreigners may affect the motivation of Taiwanese expatriates and the local staff, senior management recognizes that their presence is necessary to portray a global image. However, an effective performance management system is necessary to justify the selection of these international staff. Otherwise, it might be demoralizing for the Taiwanese expatriates and the local staff. Conflict is inevitable, perhaps due to cultural differences, and Taiwanese expatriates are perplexed as to why their organizations spent so much on staffing subsidiaries with foreign expatriates. They also see it as a burden having to speak and write in English working with the foreigners:

[…] his salary is quite high so it is a conflict to our internal staff […] some staff said they cannot understand why the company spend so much money to hire one foreigner […] also because they have to speak English […] the engineers […] they have to write in Chinese and then translate to English […] a burden for them […] (HR5).
Except for one company, global HR is not a buzzword though senior management acknowledges the importance of having staff that is more international. One of the companies coined the term “international staff” to represent those who have been identified to take up assignments abroad. This may be just a list of names of candidates identified during recruitment selection for special training. They are placed in a talent pool and are given the resources, such as traveling allowances and short-term overseas assignments, to make them more comfortable and willing to work overseas:

We have to give them some resources to make them more comfortable and willing to work overseas [...] provide them budget to travel to work for a few months abroad [...] (HR1).

However, not all in the talent pool will be expatriated. Those in the talent pool have the right competencies for a specific job and have expressed their willingness to assume an expatriate assignment. The international exposure is deemed important for expatriate success. Hence, the talent pool is getting younger (late 20s to mid-30s) and these companies do indicate clearly to the staff the importance of being global for career advancement in the company. In fact, in some of the companies, expatriate experience is one of the criteria for promotion:

For some positions they must have the experience working abroad to earn a promotion [...] that is one of the conditions [...] a requirement [...] (HR2).

Despite this, some expatriates expressed concern on missing a promotion while working in abroad. Apparently, employees who chose not to be expatriated were promoted faster. But, expatriates are still hopeful that they will be promoted eventually upon repatriation.

Nonetheless, in all the companies there is an international human resources department within the HR department that is responsible for managing the human resources of overseas subsidiaries.

Global human resources development policies
All the companies indicate that efforts are made to prepare their staff to be able to operate globally. Though the intensity varies from one company to another, it appears that well-formulated policies are limited. For instance, one of the companies emphasizes that within the first phase of globalization, the global human resources department in the headquarters serves as the main center to develop its talent pool. However, another company states that it has just drafted some policies and attests that they still have a long way to go as far as developing global human resources is concerned. While acknowledging that overseas operations are expanding, nothing much has been done in the last three years:

[...] I think we still have a long way to go [...] in these three years we have just start to [...] (HR2).

There is no formal knowledge sharing of expatriate experience from repatriates to educate the talent pool on the survival skills of working in a foreign country. Knowledge exchange is limited to informal chitchats with colleagues on the need to change their work culture in order to adapt. To enhance their cross-cultural adjustment ability, some resources such as tapes, guidebooks and videos are available. Other expatriation-related information is also uploaded in the companies’ websites. Except for one of the companies, repatriates do not conduct any formal training, but advise the HR department on some pertinent issues. However, all the companies indicate that they are in the process of getting repatriates to share more of their experiences with the potential expatriates.

Nonetheless, all the companies provide some form of pre-departure training before sending the expatriates abroad. In one of the companies, for instance, specific training programs on a rotation basis is provided for operation staff that will be expatriated. On the contrary, there is limited training for managerial staff as the talent pool is not sizeable enough to feasibly introduce formal programs. Currently, two managerial staff members
are undergoing customized rotational training programs to master the various functions before being temporarily assigned to a foreign subsidiary for observation. After the familiarization visit of between two to three months, they will be expatriated for three (operation staff) to five (managerial staff) years if they fit the expatriate position. However, due to the costs involved, the HR department is now considering selection tests on cross-cultural adaptability and open-mindedness in place of the internship abroad. Generally, the duration of pre-departure training is two months in total, which will be conducted by internal trainers and external consultants.

From the perspectives of the expatriates, familiarization visit is the most useful pre-departure training as it enables them to see and experience the host country before deciding whether to relocate. Identifying a mentor during the visit further facilitates the decision process:

[...] that period is very important for expatriate because you will know in that two or three months whether you are suitable for living abroad or not [...] (Exp 3).

Other pre-departure training that may be useful includes providing information that could assist them to settle down quickly, such as information on housing, transportation and children’s education. Language training is also crucial as it expedites their assimilation with the local community. In countries such as Philippines, Cambodia and China where cultural differences are significant, cultural awareness training is also needed. The expatriates also opine that security briefing is imperative so as to have a better understanding of the security level of the host country.

Best practices in developing global human resources
In terms of developing global human resources, nothing much has been done in one of the companies. Apparently, they are still in the process of identifying how best to solve some of the problems facing the management of their global human resources:

[...] now we are looking for the best practice [...] (HR4).

[...] we want but there are very few people willing to enroll in this program [...] (HR2).

While on the one hand they have difficulty convincing the right candidate for expatriation, on the other hand, they have new graduates who indicate interest in working abroad. However, it is not the policy of the company to send them straight from college to a foreign subsidiary, as they would lack the experience to manage the overseas operations. Moreover, this company has encountered problems with local recruits fresh from university, where after two or three years with the organization, they leave to join other local companies that offer higher. Currently, they are considering recruiting young talented individuals of other nationalities that can speak English and Chinese (Mandarin) well and train them at the headquarters for two to three years before expatriating them to foreign subsidiaries. They believe that if these individuals can live and study in Taiwan or other foreign countries, they have been internationally exposed and should be able to adjust across cultures.

The other companies have better practices in place. These companies see expatriation as one of the ways to develop their human resources. To identify the right candidate for professional development, these companies focus on employees that are highly motivated, have a global mindset and possess personality traits that are essential for expatriate success:

[...] mindset [...] personality matters [...] during the selection process [...] make sure they have the global mindset [...] (HR4).

Employees with good networking skills are preferred as the companies rely highly on the local staff, especially on matters related to human resource. In essence, the HR department in the headquarters depends on the Taiwanese expatriates to liaise with the local HR staff
for assistance and to expand the local network. A strong networking system between the HR departments is important, as Taiwanese expatriates may not be familiar with the host country regulations pertaining to employment matters. Both departments engage in a monthly video conference call to discuss any problems that arise in the subsidiaries and to seek a better understanding of the local market:

Continuous keep in touch with the local people and regularly contact with the expatriates and understand the business situation. Maintain the sensitivity of the local culture by having regular communication and hold activities with HQ (HR7).

Additionally, these companies make certain that those identified are competent and ready for professional training before expatriating them. The HR department in the headquarters is often in close contact with the expatriates at the beginning and end of the expatriation period – at the beginning to help them adjust abroad and at the end to prepare them for repatriation. During expatriation, not much time is spent on them though expatriates can provide feedback anytime:

[...] during the expatriate period, we HR don’t have the time to take care of them actively [...] (HR3).

The overseas HR department provides support on receiving their feedback and attends to any questions raised. The HR department at the headquarters will take action, but not actively helping them:

[...] we also act as negotiators between the locals and the expatriates [...] they don’t want to talk to the local managers [...] they will call us [...] we try to help them [...] (HR1).

Another practice in one of the companies is organizing seminars that focus on global issues. These seminars are conducted at the organizational and departmental levels. At the organizational level, these seminars are held twice a year and all managers, vice presidents and those in higher management are invited to attend. As the focus is on global issues, the main purpose is to share the latest global trends. It is important to understand what is trending in the industry and market to ensure currency in their strategic decisions. These seminars also aim to help the employees develop a more global mindset and be able to strategize to face challenges that emerge as a result of globalization. During the seminars, problems and issues of the subsidiaries are discussed. These discussions are aimed at providing the participants with a more holistic view of the global economies and trends that affect the world at large generally, and the subsidiaries, in particular.

Discussion
Emphasizing the term “global human resources” may contribute to raising awareness among employees on the importance of having a global mindset, a global network and the ability to operate globally. If global human resources were a buzzword at the organizational level, it may create a culture of globalism (Aycan, 1997; Langinier and Froehlicher, 2018) where employees are more likely to proactively seek to be more global. This is attributed to the herd mentality where individuals follow group behaviors (Raafat et al., 2009), such as following trends. In accordance with the cognitive psychological point of view, individuals will align their thoughts and behaviors to be “global” if that is trending in the organization. Consequently, this enhances the confidence of employees to accept expatriation (Stroh, 1995). To some extent, this would resolve the problem of unwillingness of employees for expatriation.

Cross-cultural adjustment seems to be the key for expatriate mission accomplishment. This concurs with the prior literature related to successful expatriation (e.g. Harrison and Shaffer, 2005). Indubitably, expatriates with high cultural intelligence are less likely to suffer from culture shock and are able to adapt faster to the new environment (Bhaskar-Shrinivas
et al., 2005; Chen et al., 2011). What is needed is the opportunity for employees to be exposed to different cultures (Michailova and Ott, 2018) as learning can happen entirely through symbolic modeling; that is, observing a behavior and mentally rehearsing the behavior (Bandura, 1977), and then adjust those behaviors as well as self-regulate their behaviors (Davis and Luthans, 1980). Nonetheless, expatriates need to display behaviors perceived as appropriate by their international (Langinier and Froehlicher, 2018) and local counterparts (Toh and DeNisi, 2007; Varma et al., 2006). Candidates with high levels of behavioral cultural intelligence are likely able to exert culturally and situational appropriate behaviors with ease and comfort (Earley, 2002) as well as present culturally appropriate words, tone, gestures, facial expressions, and body language (Zhang and Oczkowski, 2016).

Additionally, higher cross-cultural adjustment likely mitigates the unwillingness of employees to be expatriated. Fear of the unknown and failure discourage employees from leaving their comfort zone (Stroh, 1995). As the unwillingness is associated with better career prospects at home, organizations need an effective, proper and structured performance management system that links expatriation with career progression (Aycan, 1997; Milliman et al., 1991). Organizations need to create a tighter alignment between global mobility and global talent management (Farndale et al., 2010; Schuler et al., 2011) to ensure a constant pipeline of globally mobile talents (Cerdin and Brewster, 2014; Collings, 2014). Recognition, opportunity to use experience, repatriation career support and position choices upon return may encourage the expatriates to accept expatriation. Feldman and Thomas (1991) further assert that the new position upon repatriation is one of the major sources of stress for expatriates, which negatively influences performance.

Developing the right people is imperative for expatriate mission accomplishment. Using international assignment success as a criterion (Caligiuri et al., 2009), however, may lead to inappropriate selection decisions (Michailova and Ott, 2018). Despite weeding out non-talents even during recruitment, there is no assurance that successful candidates have the personality traits for successful expatriation. Therefore, personality deserves due attention as the relatively immutable and universal Big Five personality traits of openness, conscientiousness, extraversion, agreeableness and emotional stability are linked to motivated behaviors at work, and affect developmental outcomes (Caligiuri, 2000). Assessment tools should be employed to identify global aptitudes of potential candidates (Brookfield, 2015). The focus should be on hiring for capability, commitment and chemistry. Thereafter, effective expatriate performance management systems that accurately assess both the technical and developmental aspects of expatriation are necessary. Developmental performance dimensions may be knowledge-based and ability-based, but should include cross-cultural competencies (Caligiuri and Bonache, 2016).

Language barrier can be a major obstacle in expatriate mission accomplishment. Enhancing language proficiency is central to maintain excellent communication and coordination links between subsidiaries and the corporate headquarters (Caligiuri, 2014; Harzing et al., 2016; McNulty and Brebner, 2017). Miscommunication or misinterpretation can be costly. It deters organizational socialization, as it is rare that people clique if they cannot interact smoothly. Expatriates can bond well with other expatriates and local employees if they speak the same lingua franca (Zhang and Harzing, 2016). When expatriates are not willing to learn the corporate or host language, it results in segregation between expatriates and local employees as there is no common ground to begin establishing trust (Okamoto and Teo, 2011; Zhang and Harzing, 2016). Worse still, it may lead to the formation of in-group and out-group at the workplace, and subsequently, increased office politics. Providing incentives to encourage the use of the language or linking English proficiency with career progression are some ways that companies can consider.
Implications, limitations and suggestions for future research

From a theoretical perspective, this study identified four main patterns. First, in light of herd mentality, which posits that human behavior is influenced by peers to adopt a herd following behavior, decision-makers are adopting behaviors that are considered the norm to portray a more global image. The herd mentality applies especially to staffing foreigners and adopting English as the lingua franca in overseas subsidiaries. Second, from assimilation point of view, social support is instrumental to facilitate international transition by reducing stress and ambiguity of expatriates. The general view is that training is essential to provide information and clarify expectations, in particular, cultural awareness training, familiarization visits and security briefing. Third, drawing on social learning theory, symbolic modeling, which emphasizes on observing, rehearsing, retaining and reproducing a behavior, is central for cultural adjustment. To develop expatriate experiences effectively, organizations have to ensure that there are opportunities for expatriates to build valuable relationships with host nationals through culturally acceptable behaviors. Finally, from the social capital perspective, a strong network, good networking skills and a global mindset are essential to draw resources from the social network.

From the practical perspective, this study has several important implications for practitioners in their development of talents for international assignments. First, it provides valuable insights about developing global human resources to accomplish missions in foreign subsidiaries. Most importantly, the study highlights various factors that HR professionals at the headquarters need to consider when designing training programs to prepare selected talents for expatriation. Among the crucial ones is a comprehensive pre-departure training program that extends beyond language training. Most organizations tend to focus on pre-departure training to help expatriates assimilate swiftly, but a little more attention perhaps is needed for security briefings and familiarization visits. Moreover, support during expatriation is vital for mission accomplishment and organizations should be proactive rather than reactive in this. Training during expatriation has been much neglected and ought to be given more serious thought. To mitigate anxiety upon repatriation, post-departure training is also essential in sustaining the commitment of returnees.

Second, considering the importance of cross-cultural competency influence on global operations effectiveness (Stroh and Caligiuri, 1998a) and the increasing demand for culturally agile business professionals, there is a greater need for organizations to measure cross-cultural competency development. To ensure the successful integration of global mobility and global talent management, organizations need to assess the actual competencies gained during expatriation. Therefore, the training programs should also enhance the understanding of the performance management system and the rewards associated with expatriation. Besides, it raises practitioners’ awareness of the criteria that should be noted during hiring and selection of candidates to be considered for expatriation. It is hard for staff to be engaged, satisfied and committed if they are unhappy with incompetent foreign expatriates. Potential expatriates too can benefit from the training provided to enhance their readiness for expatriation. A good command of English may not be enough. Perhaps more important is the readiness, attitude and fit for expatriation. More importantly is a global mindset, a global network, social intelligence, the right personality and motivation. Having the right personality characteristics is important, as these are not likely to change despite training and development (Caligiuri and DiSanto, 2001). Being global is more than just doing things that reflect a non-traditional western image in an eastern enterprise. The right people with the right development are likely able to provide global leadership for mission accomplishment abroad (Caligiuri, 2006).
Third, it emphasizes on the criticality of considering the younger generation for expatriation. Today, practically everyone can fly and this has changed the lifestyle of all generations. It is perhaps the dream of every early-career employee to travel and work at the same time. Generally more agile, cross-cultural adaptability would be easier for early-career employees and, more importantly, they are willing to travel. Hence, practitioners need to appreciate how younger talents may contribute to mission accomplishments abroad since they grew up in a more globalized environment. Being surgically attached to social media, the younger generation has seen the world through photos posted on Facebook, Instagram and other social media platforms. Being tech and online savvy, they can easily connect with a soft touch on their mobile screen.

Though this study has provided valuable insights, it is not without its limitations. First, though the sample size is reasonable for this study, it is constrained to three financial institutions in Taiwan. It is suggested that future studies consider increasing the number of financial institutions and their subsidiaries to gain a more holistic view from a larger sample of expatriates. Future studies may also consider including multiple banks that have subsidiaries in the same countries to see how the results differ from each other. Another avenue for future research is extending it to other sectors or countries for a comparative analysis. Second, this study is limited in terms of time and resources, thus hindering a more extensive coverage. It is recommended that future studies allocate more time and resources to conduct an in-depth study. Third, the context of the study is restricted to the financial institutions in Taiwan and its subsidiaries in Asia and Australia. Thus, it may not be representative of a different context. Future studies should consider a wider context. Fourth, the findings may have been generalized based on the understanding and interpretation of the context. Hence, it is recommended that future studies have more researchers to avoid bias. Finally, the collected data have been aggregated to provide an overview of the study. However, data collected from each bank and country may be different. It would be interesting to study the subsidiaries in each country separately to understand the needs of the expatriates in each country. Such a study can offer country-oriented expatriation processes and best practices to develop global human resources.

Conclusion
The globalized economy has resulted in increased expatriation (Cerdin, 2010) and there is indeed a need to expedite the development of global human resources and create a talent pool for international assignments. This study explores the development of global human resources for leadership assignments to enhance expatriate mission accomplishment rate at overseas subsidiaries. Results of the study reveal that the term “global human resource” is not clearly defined or emphasized in all the companies. For developing global human resources, the main focus is on pre-departure training, but it is not structured enough to entice employees to expatriate. Fear of working in a situation of unfamiliarity, lost opportunities back home and a reasonably comfortable home environment deters employees from expatriating. As it is not mandatory for repatriates to conduct in-house training to potential expatriates, knowledge transfer from repatriates is limited and informal. Identifying the right candidate starts from the recruitment stage, and only those with a global mindset, high motivation and interest to be expatriated are selected to undergo training to develop their networking and professional skills. However, as the scope of expatriation has become much more complex and diverse, expatriation experiences and demands will vary. Thus, a deeper and theoretically sound understanding of issues predicting expatriate mission accomplishment is necessary for organizations to develop their global human resources. This research provides a better understanding of the factors that should be considered for the development of global human resources to ensure the accomplishment of missions abroad especially in the emerging economies of Asia.
Such understanding creates a value for both theory and practice. Due to the increasing differentiation in expatriate assignments, future studies should examine the context in which expatriates are working so that HR professionals can prepare appropriate global human resources development programs to enhance the mission accomplishment rate.

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A grounded theory approach to understand the Portuguese emerging adult self-initiated expatriates’ cross-cultural adaptation in the United Kingdom

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Abstract

Purpose – The purpose of this paper is to inductively develop a model of cross-cultural adaptation for emerging adult self-initiated expatriates (SIEs).

Design/methodology/approach – Data were collected through semi-structured interviews with 18 Portuguese emerging adult SIEs, aged between 18 and 29 years, residing in the UK from 5 months to 2 years. The analysis of these interviews through a grounded theory, using computer-assisted qualitative data analysis software (Atlas.ti), allowed describing what constitutes participants' cross-cultural adaptation and what are its determinants.

Findings – Five dimensions of cross-cultural adaptation emerged (cultural, emotional, social, practical and work), along with 18 determinants related with four different levels: personal, interpersonal, societal and situational. These determinants are related with the pre- and post-relocation phases of participants’ expatriation experience and some of them act as buffers, capturing a more integrative picture of the cross-cultural adaption process.

Research limitations/implications – In order to enhance the validity of the inductively identified relationships between cross-cultural adaptation and its determinants, the authors consider that they could be empirically tested.

Originality/value – This study points to several contributions in the fields of cross-cultural adaptation, emerging adulthood and self-initiated expatriation. By considering this study’s sample, the authors contributed to Farcas and Gonçalves’ (2016) call for more research focusing on emerging adult SIEs. In doing so, the authors simultaneously addressed the gap in the emerging adulthood literature regarding the focus on non-university samples of emerging adults. The methodology of this study can also be considered a contribution. By conducting interviews with emerging adult SIEs and analyzing them through a grounded theory approach, the authors were able to develop a model of cross-cultural adaptation. To the best of the authors’ knowledge, this is the first model which was inductively developed, enabling a broad understanding of emerging adult SIEs’ cross-cultural adaptation, in terms of what constitutes and influences it.

Keywords Self-initiated expatriates, Grounded theory, Emerging adults, Cross-cultural adaptation, Qualitative studies

Paper type Research paper

More than 3 percent of the world’s population is living abroad. This translates to over 232 million people, out of which approximately one quarter is aged between 18 and 29 years (United Nations Department of Economic and Social Affairs, 2013). This age range corresponds to emerging adulthood, i.e. a developmental period, characterized as a process of preparation for adulthood, which involves a consolidation of the sense of self while undergoing experimentation and exploration in love, work and worldview (Arnett, 2000). Similarly, the move from one country to another has been described as a process which requires the need for re-organization of the self, while trying to adapt to the changes associated with the transition to a new culture (Akhtar, 1999; Walsh et al., 2005).
Therefore, an emerging adult who has chosen to move abroad is simultaneously attempting to adapt to the challenges associated with the developmental period he/she is undergoing, together with the ones imposed by the move to a host country.

The emergent adults’ move to a host country has been suggested to have significant consequences for their well-being (Ward et al., 2001). Therefore, previous research explored the factors which facilitate or hamper emerging adults’ adaptation to a new cultural environment (Zhang and Goodson, 2011; Shafei and Razak, 2016). Nonetheless, it focused mainly on university samples, hence providing a broad understanding of international students’ cross-cultural adaptation. For example, it is well known that international students’ cross-cultural adaptation has been measured following Ward et al.’ (2001) bi-dimensional conceptualization: psychological (ability in handling life stress and feeling comfortable with the life in the new culture) and sociocultural (ability in handling daily issues and establishing social relations). In addition, the most frequently reported predictors of cross-cultural adaptation included language proficiency, gender, personality and length of residence in the host country chosen for studying purposes (Mesidor and Sly, 2016).

Besides studying abroad, there are other motives which may trigger emerging adults’ move to another country. For example, emerging adults might move abroad for working purposes. This is an understudied motive in the emerging adults’ cross-cultural adaptation literature. Bearing this in mind, along with the fact that different motives resemble different characteristics of the move abroad and create different contexts of cross-cultural adaptation (Ward et al., 2001), in this paper, we will explore the cross-cultural adaptation of emerging adults who move abroad for working purposes.

**Emerging adult self-initiated expatriates**
Moving abroad for working purposes is a common characteristic of individuals who engage in international work assignments (Peltokorpi and Froese, 2009). They are denominated expatriates and based on the initiator of their work assignment, they can be further divided into assigned expatriates (AEs) and self-initiated expatriates (SIEs). AEs are employees of a business organization who are relocated by the employer to temporary work in a foreign subsidiary (Harrison et al., 2004). Therefore, their international work assignment is initiated by their employer, contrary to SIEs who on their own volition seek and find work abroad during a temporary period of time (Inkson and Myers, 2003).

Studies comparing SIEs and AEs show that SIEs have a larger presence abroad (30 vs 70 percent, respectively) and are younger than AEs (Sutari and Brewster, 2000; Peltokorpi and Froese, 2009). Earlier studies included in their samples SIEs aged under 30 years old (Selmer and Lauring, 2010; Ellis, 2012; Yijälä et al., 2012), which suggest that some SIEs might actually be emerging adults. Nonetheless, to the best of our knowledge, there is no earlier study examining this group independently. Given that emerging adulthood is an important developmental period in preparation for adulthood, we recognize the relevance of distinguishing this segment from the other SIEs. This can provide more accurate and less misleading results. Along similar lines, a recent literature review on SIEs (Farcas and Gonçalves, 2016) considers that if comparative studies report SIEs as being younger than AEs, then emerging adult SIEs are a group that can be further explored. In other words, their cross-cultural adaptation should be the focus of future research since this is an underexplored topic in the SIEs literature, which has mostly addressed the motivational and career related issues.

**Cross-cultural adaptation**
Cross-cultural adaptation, adjustment and acculturation are three terms that have been used interchangeably in the literature (Harrison et al., 2004). They refer to the process and
outcomes of moving to an unfamiliar cultural environment. Adjustment is more typically
applied to expatriates, while acculturation is more commonly associated with immigrants.

The reasoning behind this is that expatriates have to cope with minor changes while
immigrants deal with major realignments/negotiations between the home and host culture
(Haslberger et al., 2014). Ali et al. (2003) suggest that adaptation is the process of dealing
with cross-cultural transitions, while adjustment is its outcome. There is no consensus in
the literature, but cross-cultural adaptation seems to be a more inclusive term considered
to be crucial for a successful relocation experience. Therefore, knowing exactly what
constitutes and influences it is extremely relevant.

According to the ABC model of culture contact, cross-cultural adaptation can be
categorized in three dimensions (Ward et al., 2001). First, the affective dimension (A) has a
stress and coping focus, looking at how individuals feel during cross-cultural encounters
and what are the coping strategies that they employ. Second, the behavioral dimension (B) is
centered on the culture learning approach and highlights the importance of individuals’
ability to acquire relevant social and cultural skills in order to thrive in the new cultural
environment. Last, the cognitive dimension (C) is based on the social identification theory,
concerning how individuals perceive and categorize themselves and others within the
intercultural context (Ward et al., 2001).

In the SIEs’ literature, an interaction between the person and the environment was
proposed when addressing the cross-cultural adaptation (Nolan and Morley, 2013).
Consequently, Black and Stephens’ (1989) definition of cross-cultural adjustment is
adopted. It refers to the degree of comfort regarding aspects of the new cultural
environment and proposes three distinct facets of cross-cultural adjustment: general,
interaction and work. General adjustment involves the manner in which individuals
acquire social and cultural skills (e.g. getting used to the local food, establishment of
relationships with host country nationals, fitting into the new workspace) that will help
them navigate efficiently in the new cultural environment. These facets focus on how
individuals feel during cross-cultural encounters (affective dimension) and their ability
to acquire relevant social and cultural skills (behavioral dimension). The cultural
dimension of the ABC model (Ward et al., 2001) seems to be omitted (i.e. how individuals
perceive and categorize themselves); hence, some researchers (e.g. Ali et al., 2003;
Haslberger, 2005) questioned the widespread acceptance and use of this definition in the
expatriation literature. They consider that, when defining cross-cultural adaptation,
additional factors should be considered (Haslberger, 2005). Therefore, the facets of
cross-cultural adjustment proposed by Black and Stephens (1989) are deemed to lack
discriminant validity, due to its scant theoretical grounding (Hippler, 2008; Stahl and
Caligiuri, 2005). Additionally, one might question if this depicts SIEs’ full perception of
what constitutes cross-cultural adaptation. In other words, Black and Stephens
(1989) proposed the previously presented definition of adaptation having in mind AEs’
cross-cultural adjustment. Due to the fact that SIEs have been proven to differ from
AEs (Biemann and Andresen, 2010; Cerdin and Le Pargneux, 2010; Farcas and
Gonçalves, 2017; Froese and Peltokorpi, 2013; Suutari and Brewster, 2000; von Borell de
Araujo et al., 2014), we consider that it is important to inductively determine their
perceptions of cross-cultural adaptation. Therefore, the first research question addressed
by this study is:

RQ1. How do emerging adults SIEs perceive cross-cultural adaptation?
Determinants of cross-cultural adaptation

Previous research (e.g., Hippler et al., 2014) investigated the effect of many factors influencing cross-cultural adjustment, however less is known about SIEs adaptation. This is mainly due to the dominance of Black et al.’s (1991) model in the theoretical treatment of expatriate experiences, which has limited the attention, given to theoretically related antecedents (Haslberger et al., 2014). This model is built on the premise that individuals adjust to the host culture before moving and after arriving, a process that is influenced by several factors, such as individual (e.g. previous experience) and non-work factors (e.g. family), as well as organizational (e.g. organizational culture novelty) and work factors (e.g. role clarity). While these factors are likely to influence SIEs’ adaptation, organizational and work factors are expected to be less dominant since their relocation does not occur through job transfer as for AEs. A model of SIEs cross-cultural adaptation is still lacking and only some studies explored the antecedents of SIEs’ adaptation (McDonnell and Scullion, 2013).

The results are inconclusive with respect to the influence of previous international experience and language proficiency, since positive, negative or null effects were found (Peltokorpi, 2008; Alshammari, 2012; Isakovic and Whitman, 2013). Nonetheless, some agreement has been achieved regarding the negative influence of culture novelty (unfamiliar host country) and the positive influence of the personality trait, cultural empathy (Peltokorpi, 2008; Isakovic and Whitman, 2013). Some other isolated findings emerging from studies comparing SIEs and AEs indicate that SIEs adapt better because they move abroad on their own volition (Suutari and Brewster, 2000), are more predisposed to interact with host country nationals (Froese and Peltokorpi, 2013) and emulate host country behaviors for resolving challenges (von Borell de Araujo et al., 2014). All these antecedents have been mostly deductively driven and we consider that it is important to use an inductive approach to further our understanding of SIEs’ cross-cultural adaptation. Therefore, a second research question is addressed by this study:

RQ2. What factors, perceived by emerging adult SIEs, facilitate or inhibit their cross-cultural adaptation?

The present study

The main goal of this study is to develop a cross-cultural adaptation model for emerging adult SIEs. The main presumption is the fact that, to the best of our knowledge, no earlier study addressed the cross-cultural adaptation of emerging adult SIEs. Instead, previous studies focused emerging adults’ and SIEs’ cross-cultural adaptation separately. On one hand, studies focusing on emerging adults’ cross-cultural adaptation used solely university samples, which limited the generalizability of the results to the emerging adults who move abroad for other reasons, such as work (e.g. SIEs). On the other hand, studies focusing on SIEs’ cross-cultural adaption have predominantly used the cross-cultural adjustment framework of Black et al. (1991), which targets AEs and therefore disregards the specificities of SIEs.

We decided to inductively explore what constitutes emerging adult SIEs’ cross-cultural adaptation and identify its determinants, by focusing on the Portuguese emerging adult SIEs in the UK. According to the data from the Portuguese Emigration Observatory (2015), Portugal is the European Union member state with the highest percentage of emigrants as a proportion of its population, since more than 20 percent of the Portuguese population is living abroad. Every year from 2012 to 2014, more than 30,000 Portuguese migrated to the UK (Portuguese Emigration Observatory, 2015). The majority of them (around 64 percent) are aged between 18 and 34 years, approximately
40 percent have college education and are considered to make a significant contribution to the number of mobile employees in the world, which stands at 150.3m (International Labor Organization, 2015).

Methods
Participants
The sample consisted of 18 Portuguese emerging adult SIEs between ages of 24 and 29 (\(M = 27.5\), SD = 2.14), who, while in Portugal, searched and found their current job in the UK, coinciding with their area of expertise, i.e. IT, engineering, investment banking and health (e.g. nursing, pharmacology). The majority were females (66.6 percent), single (94.4 percent), holding a Bachelor (38.8 percent), Master (55.6 percent) or PhD degree (5.6 percent). For half of the sample, the move to the UK was the first relocation experience. It was triggered by four main reasons: dissatisfaction with the working conditions in Portugal (50 percent); the desire to acquire an international professional experience (i.e. have new responsibilities, which could enable career progression and/or work in areas which are more developed than in Portugal (38.9 percent); the desire to acquire an international personal experience (i.e. getting to know and being in contact with other cultures, speaking a different language and experiencing living in a different environment (33.3 percent); and unemployment (11 percent). UK was chosen as a host country because of the geographic and historic proximity to Portugal, local language, and better career opportunities. Most moved alone (77.8 percent) or accompanied by friends (22.2 percent) with whom they are sharing accommodation (38.9 percent). In Portugal, the majority reported living with their parents (61.1 percent). Participants’ time spent in the host country ranged from five months to two years, and most of them (61.1 percent) were not willing to extend this period for more than five years.

Data collection procedures
For data collection, we used theoretical sampling defined as “the process of data collection for generating theory whereby the analyst jointly collects, codes and analyses his data and decides what data to collect next and where to find them in order to develop his theory as it emerges” (Glaser, 1978, p. 30). Therefore, recruitment of participants and analysis of data was done simultaneously, until saturation of data was achieved, i.e. realizing that the gathered fresh data did not present any additional theoretical insights and it merely confirmed the previously established conclusions, representing at least 80 percent of the participants’ discourses (\(n = 15\); see Gomez et al., 2001).

Participants were recruited using various methods, such as migration-related organizations, snowball sampling technique and social networks. We provided a disclosure letter, where the study was described and the inclusion criteria was presented with all Portuguese living and working in the UK, who were willing to share their migratory experience as interviewees. The inclusion criteria included: being Portuguese, aged between 18 and 29 years, who relocated from Portugal to UK since 2012, on the basis of a job offer. This formalized job offer should be the consequence of an active search initiated by the participant in Portugal, prior to relocating to the UK with defined repatriation intentions. Those who met the inclusion criteria and were willing to participate contacted the first author of this paper, using the provided e-mail on the disclosure letter. Then, a date was agreed for conducting the interview and participants were asked to sign a written consent form, which described the interview’s aim and requested their permission to audiotape it. Participants were also asked to fill out a socio-demographic questionnaire composed by variables which enabled the participants’ characterization previously presented.

In-depth interviews were conducted with participants via Skype with video. Following Charmaz’s (2006) instructions, a semi-structured three-sectioned interview
guide was formulated. In the first section, participants were thanked for their availability; the interviewer (first author of this article) introduced herself and explained how the interview was going to unfold itself. The second section was composed by open-ended questions focused on participants’ cross-cultural adaptation to the host country, based on existing theory and previous findings. The third section was dedicated to closing up the interview, by checking if the participant would like to add/clarify any provided information. All interviews lasted approximately 70 min.

It is important to highlight that, prior to the conduction of these interviews, the interview guide, informed consent form and socio-demographic questionnaire were pilot-tested to assess clarity and relevance of questions. The pilot test was conducted with four participants with similar characteristics of those that we interviewed for our study, i.e. emerging adults who were living and working abroad. Following the previously described procedure, each participant was asked all the questions prepared in the interview guide and filled out the informed consent form and socio-demographic questionnaire. In addition, they were asked to provide feedback about the questions’ wording and clarity. The feedback was positive; hence, we proceeded with data collection.

Data analysis
The interviews were verbatim transcribed and analyzed using a grounded theory approach, since it has a clear focus on interaction, meaning and social processes, hence providing a deeper understanding of the studied phenomena (Charmaz, 2006; Strauss and Corbin, 1998). In addition, it is considered to be principally suitable when investigating understudied populations, due to the possible inadequacy of existing measures (Morrow and Smith, 2000). Since this is the case of emerging adult SIEs, we proceeded with the grounded theory analysis, following a three-step interactive process using computer-assisted qualitative data analysis software, Atlas.ti7 (Friese, 2015). These three steps were interchangeably performed with data collection, in such a flexible and interactive way that allowed us to collect new data and constantly compare it with the previously analyzed one. Nonetheless, for clarity purposes, we are presenting these steps in a sequential way.

We started with the open coding process, focused on selecting text units (relevant phrases/paragraphs) from the transcribed material. Each text unit was associated with key concepts (codes) that best described the underlying idea. In total, 388 codes were identified.

Afterwards, we proceeded with axial coding. In this second step of the grounded theory analysis process, we began by comparing the codes in terms of their degree of similarity, and renamed them into more abstract and embracing codes (categories). Then, we explored relationships between the encountered categories. This restructuring process of the codes into categories and identification of relationships between them was assisted by memo elaboration. In the memo, we defined each category, described the decision-making process of its creation, mentioned the codes which compose it and identified how it may relate to relevant existent theories and other categories. Whenever it was possible, we also presented a graphical representation (diagram) of the proposed relationship. Figure 1, along with Table I, portrays the full graphical representation of the proposed relations.

Lastly, we conducted the selective coding process, where the core category, cross-cultural adaptation, was identified as being composed by five dimensions (e.g. cultural adaptation, emotional adaptation, social adaptation, practical adaptation and work adaptation). In addition, all the other categories related to it (e.g. determinants of cross-cultural adaptation) were identified, in order to provide a comprehensive and integrative conceptualization of the studied phenomena.
Quality criteria. In order to enhance quality control and trustworthiness of the results, we addressed three aspects: credibility, dependability and transferability (Lincoln and Guba, 1985; Creswell et al., 2007).

Credibility refers to the extent to which the findings can be established as plausible truths. In other words, it is important to guarantee that the encountered results are not a product of researcher’s imagination, but they are rather grounded in and truly representing participants’ answers. We sought to achieve this by taking into account the following two approaches: triangulation of sources and member checking. Triangulation of sources (i.e. examining the consistency of different data sources from within the same method, such as including people with different viewpoints) was attained due to the sample being composed by participants with heterogeneous cross-cultural adaptation experiences. Member checking (i.e. testing the results with members of those groups from whom the data were originally obtained) occurred when participants were presented with our interpretations of the collected data and asked to provide feedback. The feedback was positive, indicating that their cross-cultural adaptation experience was portrayed in the presented results.

Dependability denotes the extent to which the encountered results are consistent, hence assuring some consensus among other researchers’ interpretations of the same data. In order to contribute to this, we kept track of all decisions that were made through data analysis, using memos. In addition, we conducted an external audit, which consists in having a researcher who was not involved in the study to examine the study’s methodology and results. Therefore, the first author analyzed the data; while the second author and a senior scholar with expertise in qualitative methods and migration research, reviewed, discussed and validated the results. They provided relevant input regarding the relevance of this study and suggested the possibility of further grouping the categories and refining some of the established relations between the categories.
Transferability is the evaluative criteria focused on the possibility of extending the findings from one study to another similar one. This can be accomplished through techniques such as thick descriptions of the methodology, adequate sampling and data saturation. In order to accomplish the transferability of our results, in the previous sections, we provided a detailed description of data collection and analysis; we explained why purposeful and theoretical sampling was used; and how we achieved data saturation. Nonetheless, the authors of this paper can be contacted for any additional information.

**Results**

The analysis of the interviews provided a framework of participants’ understanding of cross-cultural adaptation (dimensions), and the factors that may positively/negatively influence it (determinants), as presented in Table I and Figure 1.

**Dimensions of cross-cultural adaptation**

The participants broadly defined cross-cultural adaptation through the expression of “feeling at home” and described it as a multi-dimensional concept. More precisely, according to participants’ discourses, cross-cultural adaptation was decomposed in the following five dimensions:

- **Cultural**
- **Emotional**
- **Social**
- **Practical**
- **Work**

**Determinants of cross-cultural adaptation**

The participants broadly defined cross-cultural adaptation through the expression of “feeling at home” and described it as a multi-dimensional concept. More precisely, according to participants’ discourses, cross-cultural adaptation was decomposed in the following five dimensions:

<table>
<thead>
<tr>
<th>Determinants of cross-cultural adaptation</th>
<th>Dimensions of cross-cultural adaptation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-relocation</td>
<td>Post-relocation</td>
</tr>
<tr>
<td>Personal agency</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Realistic expectations</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Previous international experience</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Personality</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Proficiency in English language</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Interpersonal</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Family support</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Contact with prospective host/home country nationals</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Engaging in recreational activities</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Interaction with host country nationals</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Interaction with home country nationals</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Working with older colleagues</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Societal</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Host country nationals’ negative attitudes toward foreigners</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Low ethnic composition of neighborhood</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Situational</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Job proposal</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Defined repatriation intentions</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Unbalanced time spent in home and host country</td>
<td>+ + + + +</td>
</tr>
<tr>
<td>Favorable housing conditions</td>
<td>+ + + + +</td>
</tr>
</tbody>
</table>

**Table I.**

Determinants’ influence on the dimensions of cross-cultural adaptation.

Transferability is the evaluative criteria focused on the possibility of extending the findings from one study to another similar one. This can be accomplished through techniques such as thick descriptions of the methodology, adequate sampling and data saturation. In order to accomplish the transferability of our results, in the previous sections, we provided a detailed description of data collection and analysis; we explained why purposeful and theoretical sampling was used; and how we achieved data saturation. Nonetheless, the authors of this paper can be contacted for any additional information.
dimensions: cultural adaptation, emotional adaptation, social adaptation, practical adaptation and work adaptation.

*Cultural adaptation.* This dimension was mentioned by all participants and it addressed the ease of adaptation to existing cultural differences (e.g. social norms, habits, routines) between the host and home culture. In order to effectively deal with these differences, participants mentioned two strategies. The first strategy involves changing your own cultural background by adopting the host country’s one, hence acting like a host country national. The second strategy requires equilibrium between the two cultural backgrounds. The following participants’ citations illustrate these two strategies, and in the next section we will present some factors which might influence their adoption:

> Being adapted means accepting how things are here, accepting the differences and consider them yours. It’s changing your own habits and adopting their habits and culture in such a way that you become one of them. (Male, 27 years)

> I think that being adapted means finding a mid-term between adopting the new social norms of the new place, but at the same time, being you. Thinking about how much do you have to give up of who you are, in order to adopt the new cultural habits? So, I think that adaptation is adopting new social norms, because if you are in a new place, there are things that you have to change in order to adjust, but at the same time, you have to think how much you are willing to give up. This is achieved when you feel comfortable and you start acting without noticing that you are making an effort for changing any kind of behavior. (Female, 25 years)

*Emotional adaptation.* This was the second dominant dimension in participants’ discourses and included statements about their feelings in the host country, in terms of the achieved degree of well-being, happiness, satisfaction and comfort; consequently, involving the lack of negative aspects such excessive crying, sadness and depression. One of the participants summarized this dimension in these words:

> Being adapted means feeling well in the country, psychologically feeling well [...] and felling happy for being there. (Female, 29 years)

*Social adaptation.* This dimension encompassed aspects related to participants’ social life, in terms of their interaction with other people and consequently the establishment of social networks. Being around other people plays an important role in participants’ relocation experience because they consider that it might help them to overcome obstacles and explore the host country’s culture. Several participants referred that quality is more important than quantity, hence they prefer having few but very close friends:

> The adaptation process involves having a social life. This is crucial for adaptation. During weekends and after work, we have to make an effort and be with other people, although we might be tired or wanting to be alone. (Male, 29 years)

*Practical adaptation.* This dimension emphasized participants’ ability to getting used to the way of functioning in the host country, such as knowing how to get around, using public transportation, health and shopping systems. For example, one participant denoted:

> Being adapted means knowing how everything works, such as the means of transportation and public services. Knowing the food that you can find, where can you have dinner earlier. (Female, 29 years)

*Work adaptation.* This dimension was the least mentioned in participants’ discourses. It addressed aspects related to participants’ employment situation in terms of job satisfaction and working environment:

> Being adapted means working in the host country, having a job that you like, a nice working environment that makes you comfortable and happy. (Male, 29 years)
Determinants of cross-cultural adaptation

As Table I shows, participants identified several determinants influencing specific
dimensions of cross-cultural adaption and others which apply to all five of them. Whenever
participants clearly mentioned the dimension affected by the determinant, we listed it;
otherwise, we noted the determinants’ impact on the overall cross-cultural adaptation. The
identified determinants of cross-cultural adaptation focus on the pre-relocation (before
moving to the UK) and post-relocation phase (while being in the UK, after moving there),
and they can be organized at the following four levels: personal, interpersonal, societal
and situational.

Personal determinants. These determinants refer to an individual’s characteristics,
related but not limited to psychological, experiential and/or behavioral aspects. From
analyzed interviews, we identified five personal determinants of cross-cultural adaptation:
agency, realistic expectations, previous international experience, personality and
language proficiency.

Agency denoted the voluntary nature of an individual’s international relocation.
Having this in mind, participants considered that it elicited positive adaptive outcomes, by
reflecting the individual control over the relocation decision and responsibility for any of
its consequences:

My adaptation would have been very difficult or even impossible if I would have come here obliged
or forced to leave Portugal, because of an unbearable situation. I am happy that this did not happen
to me. I came here, because I wanted, it was my choice and this helped me to have an easy
adaptation. (Male, 27 years)

Setting realistic expectations was referred to be another personal determinant of cross-
cultural adaptation, since participants recognized that imagining a perfect life in the UK
which, in the end, will not be that perfect, may let people down and make them unsatisfied.
Therefore, some participants suggested that setting realistic expectations about life in the
host country helped their cross-cultural adaptation because in the case of an obstacle, it will
not be much unexpected, they were more prepared to overcome it.

A similar reasoning was given for the positive impact on cross-cultural adaptation
of a previous international experience. More specifically, participants considered that
having a previous international experience like the current one, in terms of working
and living alone, facilitates an individual’s cross-cultural adaptation due to the available
and previously acquired resources (e.g. knowledge of the system) useful to overcome
eventual obstacles:

Since I had the experience of living without my parents, I already knew how it was living on my
own, taking care of a house, being responsible in a place where I did not know anyone. And this
previous experience helps adaptation a lot. (Male, 27 years)

My adaptation was good in terms of working at the hospital, because I already had a previous
working experience in Ireland and I knew how the health system works. (Male, 27 years)

Personality was also considered a determinant of cross-cultural adaptation. More precisely,
participants highlighted that the adaptation to different aspects of the host country depends
a lot on the type of person who is relocating. Being extroverted, open-minded and resilient
are some characteristics which may positively influence one’s adaptation. Extroversion was
considered an asset for the construction of a social network (social adaptation), while being
open-minded and resilient were pointed out as helpers in accepting cultural differences and
efficiently overcoming obstacles (cultural adaptation):

In order to adapt, one has to be able to change and accept differences and the fact that some British
would make fun of your accent. But this should not be taken very seriously, because they are in
their country and we have to be open minded, capable of overcoming this difficulty, thus we have to change. (Female, 25 years)

Regardless of the accent mentioned in the last citation, participants considered that English language proficiency, i.e. the ability to fluently speak, understand and write in English, is “without any doubt helpful to adaptation, since English fluency leads to a better adaptation” (Male, 27 years). More precisely, English fluency leads to better cross-cultural adaptation because it may help to interact with host country nationals and, consequently, understand the host country culture.

Interpersonal determinants. These determinants refer to the interaction between individuals and subsequent consequences which may emerge from it. Participants considered that these types of determinants can be found prior and after relocating, and they are mainly related with the individual’s social life, the established social relations and received support. For example, prior to relocating an individual might contact prospective host/home country nationals (e.g. friends or relatives living in the UK) in order to clarify some doubts and become more aware of the British culture and way of living, hence contributing to having more realistic expectations. Additionally, contacting prospective host/home country nationals may help individuals to construct their social network, influencing adaptation in a positive way:

I think that knowing someone here, who can give you tips such as finding a flat or the best phone network, can help adaptation a lot, because you have someone you can count on and you do not have to do everything on your own […] and you get to know other people […] this helped my adaptation a lot and my expectations about life here were more accurate. (Male, 24 years)

Similarly, participants considered that the support received from the family members may also facilitate cross-cultural adaptation. As it can be observed in the following quote, participants appreciated that their families approved their relocation decision. This way they felt that their decision was right and knew that they could count with their support:

My family did not force me to come here and they actually supported my decision. This actually reassured me that I was doing the right thing. It validated my decision. And since they agreed with me, I knew that they would support me no matter what! So I left Portugal with the feeling that it was the best thing I could do and it helped me to adapt. I can imagine that without my parents’ support, things would have been difficult, because in case of any challenge they would be the first ones to remind me that I should not have left Portugal. (Female, 27 years)

After relocating, the identified interpersonal determinants were focused on the participants’ social life and established relations. More precisely, participants deliberated that it is important to balance work and personal life in such a way that it would be possible to engage in recreational activities (e.g. go to concerts, theater and gym). For example, one participant mentioned:

For me, it is very important to do something besides working. There is a huge offer of activities than can be done here, and even though many times I am tired, I make an effort and go to the theater, to the gym, etc. This way I keep myself busy and avoid thinking too much about my life in Portugal and the things I miss there. I feel happy and I get to know other people and I become more and more adapted. (Female, 28 years)

Besides engaging in recreational activities, participants highlighted the importance of constructing a social network, hence interacting with other people. Specifically, interacting with host country nationals positively influenced cross-cultural adaptation,
while the opposite occurred from the exclusive interaction with home country nationals and working interaction with older colleagues. The following quotes further explain these relations:

I think that what really helps is interacting with the locals. I consider it was the best thing I did, because they helped me deal with bureaucratic staff, and other things related to how the system functions. (Female, 25 years)

I consider that having only Portuguese friends, maybe because of the language, makes the adaptation more difficult. More difficult because you are not learning about the host country’s culture. (Male, 27 years)

I think that having older colleagues at work, does not help. It is at work where you spend most of your time, and it is the first place where you meet people who are supposed to introduce you to new aspects in the host country. And if you do not have anyone who is willing to do that, because they have their families and friends, and do not identify with you, then you are not going to adapt […] but they can help you adapt at work, if they are willing to help. Since they are older, they might know more of certain things. (Female, 25 years)

Societal determinants. These determinants refer to the host country characteristics which might influence an individual’s cross-cultural adaptation. For example, participants mentioned the host country nationals’ attitudes toward foreigners. If their attitudes are negative, i.e. treating unfairly, negatively and not accepting or welcoming someone because of their different cultural background, then one’s cross-cultural adaptation might be complicated. This can get even worst, when there is a low density of foreigners present in the area where they are residing (ethnic composition of neighborhood), since host country nationals might more easily manifest their less favorable attitudes toward foreigners:

When you live outside of London, in a small town similar to the one I resided, the British look at the immigrants as if they were bandits. I am not saying that they are racists, but due to the fact that those areas are inhabited mostly by the British, a Portuguese is a stranger, more than in London […] and trust me, this can make your adaptation less positive, just like it happened to me. (Male, 24 years)

Situational determinants. These determinants refer to time and contextual factors which influence cross-cultural adaptation. Participants considered that these types of determinants are present prior and after relocating. Pre-relocation situational determinants fall upon having a job proposal and defined repatriation intentions. Participants considered that having a job proposal before departure facilitates adaptation by offering better living conditions:

My advice is to come to the UK with a job guaranteed, because it is an expensive country and not having a job guaranteed will make adaptation very difficult, if not impossible. (Female, 27 years)

On the other hand, participants considered that having defined repatriation intentions and spending more time in Portugal than in the UK, influences adaptation in a negative way because it may not enable engaging in recreational activities and getting to know the British culture. The following two citations clarify this affirmation:

Things here are basically work-home and home-work. Obviously, it is also necessary to breathe a little, but maybe I am too obsessed with work and I want to gain a lot from these 3 years of working abroad. So, during the week days there isn’t time for extra activities and the weekends are spent in Portugal, since I regularly fly there, once every 3 weeks or once every 15 days. (Male, 28 years)

I am thinking about some people that I met, who work here and then live in Portugal. For example, some work during week days and weekends, in order to gain more money and days for vacations.
Then, they go to Portugal, during one month and a half. So, they do not have any time to integrate in the British society and they do not really have a social life. (Male, 29 years)

Participants considered that favorable housing conditions can have a huge positive impact on the cross-cultural adaptation. They frequently used the expression “feeling at home” in order to describe their full level of cross-cultural adaptation and comfort, just as this participant explained:

“I realized that the house is very important. And this was strange, because I am a person that leaves the house early in the morning and does not stop all day, getting back to the house just to sleep. But even though I do not spend a lot of time in the house, it is very important to have one that is comfortable. And this is due to the fact that you are in a new city, with new people, and you look around and nothing looks familiar, that you can recognize as comfortable. So, if you do not have a place where you can go at the end of the day and feel comfortable, I think that it is something that can influence the adaptation in a negative way. And if you have it, in a positive way”. (Female, 25 years)

**Moderators.** After identifying the determinants, we looked at the proposed relations and explored some characteristics which could better explain the positive/negative influence of a determinant on the individual’s cross-cultural adaptation. For example, we looked at the negative relation between the cultural adaptation and the unbalanced time spent between home and host country. We identified that participants who relocated unaccompanied were the ones who spent more time in Portugal than in the UK because their spouses were living in Portugal. Therefore, they were mainly working in the UK and living in Portugal, where they frequently traveled:

Since my wife, who is pregnant is in Portugal, I frequently travel there and here I am basically just working. (Male, 28 years)

Also, most of these participants, whose spouse was in Portugal, lived in the UK as if they were in Portugal (e.g. watching Portuguese news, having meals at the same time as in Portugal). They did not adopt any of the identified strategies to deal with cultural differences; hence, they recognized that in terms of cultural adaptation they were not very well adapted:

Am I adapted? Well, according to my definition I am not 100% and I need to adopt more of their culture […] to be more like them and behave in similar ways. (Female, 29 years)

When questioned about their repatriation plans, they did not intend to extend their stay in the UK beyond the initial timeframe defined prior to relocating. Participants who moved accompanied, spent more time in the UK than in Portugal and were divided regarding their stay in the UK: some were willing to extend their stay while other were not. The reasoning behind prolonging the stay is related with the fact that they perceived a high job turnover in the UK and would like to continue their international work experience. Based on their repatriation intentions (defined vs undefined), participants seem to deal differently with the cultural differences. Those who were willing to extend their stay in the UK (i.e. stay in the UK for a longer time than they had initially planned), seemed to adopt more of the host country habits, relinquishing their own, while those who were not willing to extend their stay in the UK, adopted some of the host country habits and kept some of the home country ones.

Having this in mind, we may infer that moving accompanied and altering the defined repatriation intentions might buffer the relationship between dimension of cross-cultural adaptation (i.e. cultural adaptation) and unbalanced time spent in the home and host country.
Discussion
This study provides data on the cross-cultural adaptation of emerging adult SIEs. It is based on qualitative interviews and grounded theory analysis methods by which the perceptions and experiences of emerging adult SIEs have been investigated. The findings indicate how they perceive cross-cultural adaptation and its determinants.

Dimensions of cross-cultural adaptation
More specifically, the participants in this study considered that an adapted individual is one who feels well in the host country (emotional adaptation), interacts with other people in order to establish social relations (social adaptation), is able to efficiently find his/her way around in the host country (practical adaptation), deals with home and host country cultural differences in order to identify his/her cultural belonging (cultural adaptation) and is satisfied with his/her job (work adaptation). This multi-dimensional conceptualization of cross-cultural adaptation seems to reflect the ABC model of culture contact (Ward et al., 2001) and parts of the previous conceptualizations of cross-cultural adaptation.

Regarding the ABC model (Ward et al., 2001), we were able to determine that its components are represented in the four dimensions encountered in this study. More precisely, the affective component (A) is depicted by the emotional adaptation dimension; the behavioral component (B) is portrayed by the social, practical and work adaptation dimensions; and the cognitive component (C) is represented by the cultural dimension. This may suggest that in order to have a broad understanding of emerging adult SIEs’ cross-cultural adaptation, it is important to consider all three overarching theoretical frameworks which stand behind the ABC model: stress and coping, culture learning and social identification.

Concerning previous conceptualizations of cross-cultural adaptation, we identified some similarities and differences. In terms of similarities, the emotional adaptation dimension coincides with one aspect of intercultural adaptation identified by Searle and Ward (1990), namely, the psychological adaptation. In addition, the social and practical adaptation dimensions are related to the other aspect of cross-cultural adaptation proposed by these authors, entitled sociocultural adaptation. These two dimensions also reflect the interaction and general adjustment aspects proposed by Black and Stephens (1989) when defining expatriates’ cross-cultural adjustment. In their definition, work adjustment was also contemplated and the participants in this study also referred to this dimension of cross-cultural adaptation. Therefore, we can affirm that the encountered dimensions in this study are a mix of how cross-cultural adaptation is portrayed in the international students’ and AEs’ literature.

Nonetheless, when defining cross-cultural adaptation, participants in this study also referred to a dimension that was not contemplated on its own in the previously presented definitions of international assignees’ cross-cultural adaptation in the international business research stream (González-Loureiro et al., 2015). We are referring to the cultural dimension, which addresses how participants deal with cultural differences in order to adapt. Participants identified two possible strategies which can be linked to the acculturation strategies proposed by Berry (2005): integration and assimilation. The integration strategy refers to those participants who considered necessary to acquire host country nationals’ routines/habits to adapt, while preserved some of the home country ones, whilst the assimilation strategy refers to those participants who relinquished the home country habits/routines and substituted them by new ones belonging to the host country nationals.

Another unique aspect of our data is the way participants broadly defined cross-cultural adaptation. They used the expression of “feeling at home” and all the different dimensions
that were previously described decompose this broad definition of cross-cultural adaptation. In addition, participants mentioned several determinants which contribute to the participant "feeling at home," or otherwise said being cross-culturally adapted.

Determinants of cross-cultural adaptation

Similar to Black and collaborators’ (1991) model developed for AEs, the participants of this study considered that the adaptation to the new culture can occur before moving to the host country and after arriving. This enhances the importance of time in expatriate cross-cultural adaptation as proposed by Hippler et al. (2015). However, the determinants of cross-cultural adaptation identified in this study, outgrow the factors proposed by Black et al. (1991). More specifically, participants in this study identified factors which can be organized at four different levels: personal, interpersonal, societal and situational.

Some personal determinants (e.g., personal agency, proficiency in English language) were congruent with the encountered ones in earlier studies focused on SIEs (e.g., Peltokorpi, 2008; Suutari and Brewster, 2000). Nonetheless, participants in this study highlighted some new personal determinants, such as living alone. Most likely this occurred because of the characteristics of this study’s sample, being composed by emerging adults and more than half of them (61.1 percent) having lived with their parents before relocating to the UK. Therefore, living by themselves is a change in their life, characteristic of the developmental period they are undergoing, in preparation for adulthood.

Concerning interpersonal determinants, we noted that they were mentioned in both phases of the relocation experience. In the pre-relocation phase, participants referred that family (e.g., parents) played an important role in the decision to expatriate, especially knowing that they approved it. This result reinforces the importance of family’s role in the decision to expatriate independently (Richardson, 2004) and encourages us to reflect more on the relationship that these emerging adults have with their parents. In terms of the post-relocation determinants, participants highlighted that, their older host country colleagues facilitated their work adaptation, but hampered the other dimensions of cross-cultural adaptation, especially the social one.

In terms of the societal determinants, congruent with one’s expectations, they are present only in the post-relocation phase since they are related with the host country itself, regarding locals’ attitudes toward foreigners and ethnic composition of the neighborhood. Despite their apparent influence on the cross-cultural adaptation, they have not been explored in the expatriation literature.

Situational determinants were focused on the pre- and post-relocation phases. The proposed influence of two of them (defined repatriation intentions and unbalanced time spent in the host and home country) on the cultural dimension of cross-cultural adaptation is impressive. According to participants’ discourses, the way they deal with the encountered cultural differences between host and home cultures reflects Berry’s (2005) acculturation strategies of integration and assimilation.

On one hand, participants who spend more time in Portugal than in the UK do not seem to adopt any of those two strategies; hence, they do not consider themselves to be cross-culturally adapted. They might be adopting another acculturation strategy proposed by Berry (2005): separation, which refers to the rejection of the host country’s cultural background and preservation of the home country’s one. This is more common among those participants who move unaccompanied and the spouse remains in Portugal; hence separated family play a crucial role in cross-cultural adaptation. Moving accompanied by spouse might buffer the negative effect of the unbalanced time spent in the home and host country over the cultural adaptation. On the other hand, participants who have a flexible defined timeframe for their departure period from the UK adopt the assimilation strategy,
while integration strategy is more present in the discourse of those who have an inflexible defined timeframe for leaving UK.

The way how participants deal with the cultural differences is an important indicator of their cross-cultural adaptation. Integration has been considered to be the best approach in multicultural societies (Berry, 2005). Keeping in mind that approximately 9 percent of UK’s population is composed by people from other cultures and ethnicities, we can classify UK as a multicultural society (Coates, 2018). Therefore, participants who adopted the integration strategy to deal with the encountered differences might be able to adapt effectively. Nonetheless, there are other variables that might impact their adaptation. For example, according to Zhang and Oczkowski (2016), high motivational cultural intelligence directs successful cross-cultural adaptation. Motivational cultural intelligence refers to the “individual’s willingness to face and engage the new culture and their inward desire to persevere when faced with difficult situations” (Earley and Peterson, 2004, cited in Zhang and Oczkowski, 2016, p. 160). In our study, the emerging adult SIEs mentioned personal agency as a strong determinant of cross-cultural adaptation; hence, this might endorse the credibility of Zhang and Oczkowski’s (2016) results, underscoring the importance of taking ownership over the relocation experience.

Due to the fact that the expression “feeling at home” was used several times to describe the full level of cross-cultural adaptation, finding a comfortable home, i.e. accommodation, was the most mentioned situational determinant. Participants might have referred to it due to the difficulty in finding an accommodation in the UK. For 61.1 percent of participants, this was the first time they were living on their own. In Portugal, they were living with their parents, while in the UK, they lived in a room and shared the rest of the apartment with people from different cultures who they have never met before, hence finding a comfortable place to live that resembles the way of living in Portugal might facilitate the adaptation process. This is a characteristic of this study’s sample, composed by emerging adult SIEs. So, some of the proposed determinants of cross-cultural adaptation are unique, while others may possibly apply to other SIEs. As shown, some of the interpersonal determinants in the pre- and post-relocation phase, such as family (e.g. parents) support and working with older colleagues are of uttermost relevance for emerging adult SIEs.

The presence of family support is a pre-relocation determinant of emotional adaptation because it could contribute to emerging adult SIEs’ degree of satisfaction. By knowing that the family supports their relocation, emerging adult SIEs could feel more comfortable with their relocation decision. This is important for emerging adult SIEs because the overarching goal of this developmental period is to transition out of the family of origin into a stable adult identity (Goldsmith, 2018). With identity exploration comes a higher degree of instability in trying to identify who they are and what they are meant to be. Therefore, instability in work might occur, with emerging adults tending to experience different jobs. In addition, this instability may take a literal form with emerging adults having some adult responsibilities, while still being deeply connected (i.e. financially, emotionally, etc.) to parents. Parents cannot remove the instability of emerging adulthood, but they can increase anxiety by implying that emerging adults are doing something wrong, while experimenting different relationships, jobs or moving abroad. In order to make a positive contribution to this developmental phase, parents could support emerging adults’ experimentation process, by providing empathy and guidance (Goldsmith, 2018). Bearing all this in mind, we can see the importance of family support in emerging adult SIEs’ cross-cultural adaptation.

Since emerging adult SIEs are aged between 19 and 29 years, working with older colleagues might be impactful because they may have more experience in the area and positively contribute to emerging adult SIEs’ work adaptation. Nonetheless, their
interaction outside of work might be limited due to their diversified interests fostered by age gaps. Consequently, emerging adult SIEs might experience some difficulties in their social adaptation.

**Limitations of this study and future suggestions**

Some limitations related to this study’s methodology and findings should be noted. For example, regarding methodology, conducting the interviews via Skype with video might have allowed a higher potential for interruption. Even though we tried to compensate this by silencing our cellphone and putting a do not disturb sign on the front door, this was not respected in one interview and the internet connection failed in other two interviews, right in the middle of participants’ response. This required to reestablish the Skype call and ask participants to repeat their answer, which might have led to less detailed answers, since participants might have tried to summarize the previously given one.

In terms of the findings, the data were retrospective, which means that later life experiences of the emerging adults might have affected the way in which they viewed their cross-cultural adaptation during the interviews. At the same time, we should not forget that cross-cultural adaptation is a process and not a specific point in individuals’ life; hence, more longitudinal studies are needed to determine how it unfolds.

The generalizability of the results from one qualitative study based on small and non-probability sample might also be questioned. However, we consider that qualitative studies do not seek the statistical generalizations of the found results. Instead, they focus on the analytical generalizations. In the present study, this was accomplished, since the results partially reflected existing theories, while extending existing knowledge. Furthermore, Glaser’s (1978) point of view should be followed. He argues that a grounded theory is not a fixed-end point and it is always open to modifications as new data is gathered. Therefore, we consider that our findings should be interpreted as a perspective on emerging adult SIEs’ cross-cultural adaptation, or a set of working hypotheses. They are open to discussion as new data will be gathered. In fact, research is needed to further explore the proposed relationships, and we suggest that a mixed method study could be carried out, where the qualitative results are empirically tested using a quantitative approach. In doing so, some potential issues should be taken into account. For example, some determinants could influence additional sub-dimensions of cross-cultural adaptation, besides the ones mentioned by the participants in this study. In addition, some sub-dimensions of cross-cultural adaptation might be overlapping. Therefore, we consider that supplementary relationships between determinants and dimensions of cross-cultural adjustments could be further explored.

In addition, other contexts might be explored, in order to determine if the encountered results in this study apply to other emerging adult SIEs. At the same time, it would be interesting to explore if Portuguese emerging adult SIEs in different host countries perceive cross-cultural adaptation and its determinants the same way as the ones in this study. By following these suggestions, it will be a step forward into changing the current situation of having “a wealth of indicators but a dearth of replications” (Haslberger et al., 2014, p. 129).

Another suggestion for future research involves focusing on the most mentioned dimension of cross-cultural adaptation, i.e. cultural adaptation. Although previous studies (Patterson, 2002; Haslberger et al., 2014) considered that expatriates are unlikely to acculturate, due to their temporary sojourn, this study pointed out that acculturation might play an important role in their cross-cultural adaptation. Therefore, we suggest that this may be further explored. This suggestion will hopefully address González-Loureiro et al.’s (2015) concern about how adjustment-acculturation have been researched as mutually exclusory realms and scholars have devoted little effort to join the analyses.
Nonetheless, since international assignments are becoming a more common practice in the increasingly globalized world (Haslberger et al., 2014), individuals seem to deal with three major concerns: work, the place where they live and the place where their family lives. Consequently, two or more cultures may be interacting and the individual has to decide the best way to deal with them. In the case of emerging adult SIEs’ first relocation, the extended family (i.e. the relationships with parents, relatives and close friends who remained at the origin country) may play a crucial role in how they deal with the home and host country’s cultural differences (i.e. acculturate, integrate, separate or marginalize). This could influence their cross-cultural adaptation; hence, we support González-Loureiro et al.’s (2015) call for more integrative studies of adaptation and acculturation, instead of attributing research to one or another.

Contributions of the study
This study points to several contributions in the fields of cross-cultural adaptation, emerging adulthood and self-initiated expatriation. By taking into account this study’s sample, we contributed to Farcas and Gonçalves’ (2016) call for more studies focused on emerging adult SIEs. In doing so, we simultaneously addressed the gap in the emerging adulthood literature regarding the focus on non-university samples of emerging adults. Therefore, we adopted an integrative approach of emerging adults and SIEs, instead of researching them as mutually exclusionary realms. This is extremely relevant contribution to the literature focused on emerging adult SIEs’ cross-cultural adaptation, since previous studies focusing on emerging adults’ cross-cultural adaptation used solely university samples, which limited the generalizability of the results to the emerging adults who move abroad for other reasons, such as work (e.g. SIEs). In addition, studies focusing on SIEs’ cross-cultural adaptation have predominantly used the cross-cultural adjustment framework of Black et al. (1991), which targets AEs and therefore disregards the specificities of SIEs. These limitations were addressed in this study, by inductively developing a cross-cultural adaptation model for emerging adult SIEs.

The methodology chosen in this study can also be considered a contribution. In contrast to the deductive approach used so far by researchers to study the cross-cultural adaptation of SIEs, we chose to learn more about it through an inductive process. Therefore, by conducting interviews with emerging adult SIEs and analyzing them through a grounded theory approach, we were able to develop a model of cross-cultural adaptation. To the best of our knowledge, this is the first model which was inductively developed, enabling a broad understanding of emerging adult SIEs’ cross-cultural adaptation, in terms of what constitutes and influences it. Additionally, this model enabled an organization of the determinants of cross-cultural adaptation, by taking into account different facets and phases of the relocation. Several determinants were identified in the pre-relocation phase, indicating that individuals might start their cross-cultural adaptation process while in the home country.

Since one of the identified dimensions of cross-cultural adaptation is emotional adaptation, we consider that we have strengthened Tan et al.’s (2005) call for attention to the role of emotion in international adaptation and training of expatriates. Nonetheless, Gullekson and Dumaisnil (2016) realized that research has not followed suit in this area. With the aim of building such a path, they presented a review of research on emotional display and status on cross-cultural context and we consider that our paper took it a step further by collecting some empirical data regarding how emotional adaptation is understood and its determinants.

Besides the aforementioned contributions of this study to the literature of emerging adult SIEs’ cross-cultural adaptation, we would like to highlight some practical implications of our findings for emerging adult SIEs, their families and global employers. More specifically, by
knowing the determinants of cross-cultural adaptation, emerging adult SIEs could start preparing for their international experience before relocating (e.g. practice their English language proficiency) and after arriving in the host country (e.g. engage in recreational activities). This is mainly because the findings of this study point out pre- and post-relocation determinants of cross-cultural adaptation, situated at the personal, interpersonal, societal level. One of the pre-relocation interpersonal determinants of cross-cultural adaptation is family support. Therefore, emerging adult SIEs' families could become more aware of their impact on the cross-cultural adaptation of family members who are relocating. Consequently, they could positively influence the cross-cultural adaptation, by supporting the emerging adult SIEs' relocation. According to this study's findings, global employers could also make a positive contribution by facilitating emerging adult SIEs' housing conditions and working environment (i.e. work with colleagues who are in the same age range as them).

Conclusions
In this study, we have extended the boundaries of the SIE literature by inductively developing a cross-cultural adaptation model for emerging adult SIEs. To the best of our knowledge, this is the first study adopting an integrative approach of emerging adults' and SIEs' cross-cultural adaptation, instead of researching them as mutually exclusionary realms. By adopting an integrative and inductive approach, we have shown that the conceptualization of adjustment is not strictly the one which has been widely used in the SIEs' literature (i.e. the degree of psychological comfort at the destination; Black et al., 1991). Instead, emerging adult SIEs broadly defined cross-cultural adaptation through the expression of "feeling at home" and described it as a multi-dimensional concept encompassing cultural, emotional, social, practical and work adaptation. Participants also identified some pre- and post-relocation personal, interpersonal, societal and situational determinants influencing cross-cultural adaptation.

These results provide a more holistic understanding of emerging adult SIEs' cross-cultural adaptation and addressed some limitations of previous studies. We hope that our findings can stimulate increased inquiry on the emerging adult SIEs' cross-cultural adaptation, in order to determine practical ways of facilitating it and consequently enhancing a positive international relocation experience.

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How ethnographic research can help conceptualize expatriate acculturation

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Abstract
Purpose – The purpose of this paper is to show how the theory of researcher positionality can help international business researchers and human resource managers clarify the ideal position of the expatriate in relation to host country nationals (HCNs), so that selection and cross-cultural training (CCT) can be more targeted and assignment specific.

Design/methodology/approach – This is a conceptual paper linking positionality theory and the methodological practice of reflexivity from ethnographic research and other social sciences to the research of expatriate acculturation.

Findings – This conceptual paper outlines theory from ethnographic research that, when applied to expatriate selection and acculturation, increases the field’s understanding of the expatriate’s position in relation to HCNs. This theory practically informs selection criteria, CCT programs and support plans as they pertain to specific international assignments. A novel theoretical model is then proposed.

Research limitations/implications – This paper is conceptual in nature. Empirical research is needed to test the value of this paper and its proposed positionality gap model (PGM) model.

Practical implications – The research and conceptual model proposed in this paper has the potential to improve how multinational enterprise (MNE) managers conceptualize expatriate assignments, expatriate selections and expatriate CCT leading to more effective work and value added to stakeholders.

Social implications – The PGM model proposed in this paper highlights the value of HCN’s culture and preferences as input for selection and CCT of an expatriate worker and contributes to the body of literature that views expatriation with multiple stakeholder perspectives.

Originality/value – This paper’s originality stems from the application of a well-understood phenomenon in ethnographic research and other social sciences to expatriate acculturation. The common practice of reflexology and theory of positionality can clarify the ideal position for an expatriate in relation to the MNE and HCNs for both researchers and practitioners.

Keywords Expatriates, International management, Acculturation, Host country nationals, Reflexivity, Positionality, Global mobility, Cross-cultural training, International human resources management, Positionality gap model

Paper type Conceptual paper

Introduction
Expatriate labor is a vital link in multinational enterprise (MNE) value chains. The number of MNEs worldwide is expected to increase yearly along with the mobility of these firms’ employees (Selmer, 2018). These trends, along with the related world phenomena of urbanization and globalization, point to the need for continued advancement in the field of global mobility and expatriate research as both the volume and complexity of expatriation continue to grow (Novicevic and Harvey, 2001; Tarique and Schuler, 2010). MNEs’ global talent management strategies now include parent company nationals, third country nationals and host country nationals (HCNs), along with a growing focus on the advantages and disadvantages of self-initiated expatriates (Baik and Park, 2015; Lauring et al., 2016; Guo et al., 2016; Tharenou, 2013).

Business expatriates are defined as “legally working individuals who reside temporarily in a country of which they are not a citizen in order to accomplish a career-related goal, being relocated abroad either by an organization or by self-initiation, or directly employed within the host country” (McNulty and Brewster, 2017, p. 30) and are an important part of international business (IB) activities among MNEs desiring to enter
new markets and maximize stakeholder value (Johnson et al., 2006). Expatriate workers are utilized for a variety of purposes, including filling gaps in subsidiary technical expertise, exploring new markets, coaching, leading and establishing effective communication with MNE headquarters (Bebenroth, 2015; Harzing et al., 2016; Petison and Johri, 2008). One focus of international human resource management (IHRM) research is understanding the factors that influence the success or failure of expatriate workers in their assignments because of the potentially high cost of failure in instances of early return or poor job performance and the positive relationship of expatriate assignment success to MNE performance (Gonzalez and Chakraborty, 2014; Hung-Wen, 2007; Littrell et al., 2006). Although the definition of expatriate failure, rates of failure, reasons for failure and remedies for failure is still being debated and researched, what is certain is that all unplanned expatriate turnover will have associated monetary costs and effects on expatriates and their families (DeNisi and Sonesh, 2016; Guttormsen et al., 2018; Harzing, 1995; McNulty, 2015). Noteworthy as well is Harzing’s suggestion that the effects of poorly performing expatriates who do not leave their assignment early (an alternative type of failure) could be extremely damaging to the MNE (Harzing, 1995).

Unfortunately for all MNE stakeholders, much of the progress made by researchers in the field of expatriation and IHRM has yet to be applied by MNEs, leaving many expatriates and their families to learn about a new culture and assignment on their own (Littrell et al., 2006; Mayerhofer et al., 2004; Scullion et al., 2007). New theoretical advances are needed so that researchers and managers can more clearly understand the nature of international assignments, what it means to be successful in each assignment, and how to help expatriates perform well. In this paper, we will identify one area of expatriation research that can benefit from theoretical advancement, namely, the goal of expatriate acculturation. We will discuss how the goals of expatriate acculturation can be more clearly understood through the theory of positionality and the practice of reflexivity, adapted primarily from the ethnographic research literature. We will then provide practical examples of how this theory can be applied to acculturation, propose a novel theoretical model, highlight certain limitations and offer suggestions for future research.

**Literature review**

**Acculturation of expatriates**

One area of general consensus in the corpus of expatriation and IHRM literature is that the higher levels of acculturation generally lead to the higher rates of success in international assignments (Selmer et al., 2015; Sousa et al., 2017; Takeuchi, 2010; Takeuchi et al., 2005). For this reason, along with the often referenced high costs associated with expatriate failure and early return, this subject continues to be a highly researched area of IB studies and an identified ongoing challenge in global talent management (Tarique and Schuler, 2010; Welch and Björkman, 2015). Acculturation is defined by Merriam–Webster as the “cultural modification of an individual, group, or people by adapting to or borrowing traits from another culture” and has been the focus of much empirical research over the course of the last three decades (Littrell et al., 2006; Mezias and Scandura, 2005; Pekerti et al., 2017; Shenkar, 2012; Takeuchi, 2010). Increased acculturation is largely believed to help expatriate workers to minimize conflict due to cultural differences, often defined as distance, foreignness or friction (Littrell et al., 2006; Luo and Shenkar, 2011; Panaccio and Waxin, 2005; Zakaria, 2000). Recent work, however, has critiqued multiple aspects of empirical research on acculturation (Haslberger et al., 2014; Hippler et al., 2014). For example, scholars have adopted, almost without question, the theoretical model proposed by Black and his colleagues, failing to critically examine its possible theoretical weaknesses (Stahl and Björkman, 2006). One symptom of this lack of theoretical clarity is that the terms acculturation, adaptation and adjustment are sometimes used interchangeably,
and their meaning to each author is sometimes unclear (Harrison et al., 2004). Therefore, recent work in this area has sought to clarify terms, identify additional important dimensions of acculturation and develop more comprehensive models to guide more robust future research (Haslberger et al., 2013; Hippler et al., 2015).

A direct relationship between acculturation and performance is assumed by many researchers, but empirical work has yet to clearly establish this link (Stahl and Björkman, 2006). This is concerning since improving performance, even if only defined as early repatriation, is one of the primary goals of acculturation research. These theoretical issues point to the need for further theoretical advancement, so that researchers can better understand how the phenomenon of acculturation can be linked directly to job performance for the expatriate and the broader study IB’s overarching research question:

RQ. What determines the international success or failure of firms? (Peng, 2004, p. 99)

Scholars typically examine the antecedents and outcomes of acculturation, sometimes defined as factors and outcomes, while largely ignoring the mechanisms or means that facilitate acculturation outcomes (Zimmermann et al., 2003). We seek to provide theoretical clarity in the form of a model that will act as a mechanism to help researchers and managers define the goal of expatriate acculturation for specific assignments. We believe that this model will help the study of acculturation become more context specific with clearer goals enabling proper tools to facilitate acculturation to be selected.

Acculturation in IB literature is typically measured on a sliding scale with the assumption that expatriates who have experienced a greater degree of acculturation to the host country culture, environment and workplace can better accomplish their goals within the organization (Gertsen et al., 2013; Rafieyan et al., 2015; Stahl and Björkman, 2006). Measuring acculturation based on degree alone leaves expatriates, managers and researchers without a clearly defined goal as it pertains to expatriate workers’ acculturation for each assignment. The understanding that the goal for the expatriate is simply a greater degree of acculturation could benefit from more theoretical clarity, since success in a specific assignment can only be determined by the specifics of an expatriate’s role and the outcomes expected by the MNE. We propose an assignment-based, goal-oriented view of expatriate acculturation and draw from another academic discipline, ethnography, to clarify this goal.

Seeking theoretical clarity and advancement

We will now give three examples to illustrate issues stemming from the current understanding of how acculturation goals are conceptualized. One recent contribution to IB literature related to expatriate acculturation has helped to further clarify the term “cross-cultural competence” (CCC). Johnson et al. (2006) argued that “international business literature appears to lack an adequate conceptualization and definition of the term ‘CCC’, focusing instead on the knowledge, skills and attributes that appear to be its antecedents” (p.525). Johnson et al. (2006) go on to suggest that this lack of clarity adversely affected cross-cultural training (CCT) programs, leading many trainers to focus on general cultural information rather than incorporating cultural learning tools. We posit that the same is generally true in the study of acculturation literature, as work-related skills, personality traits and experience are viewed as the ends rather than means to relate well to the host culture and achieve organizational goals. A recent review of intercultural competence (IC) models groups the study of IC into the categories of intercultural traits, intercultural attitudes and worldviews, and intercultural capabilities (Leung et al., 2014). Capabilities that have been found to aid in cross-cultural communication and effectiveness include linguistic skills, knowledge of other cultures and cultural intelligence (Leung et al., 2014). While the benefits of these findings are many, theory has yet to advance significantly from compiling capabilities and their outcomes to selecting which traits, attitudes and capabilities are
needed for a specific assignment. Leung et al. (2014) stated that most intercultural relations research remains “generalized” and “decontextualized” and that, in comparison to generalized findings, “we know much less about what interculturally competent people actually do in specific intercultural job contexts” (p. 510). Leung et al. (2014) go on to encourage more context-specific research and propose the in situ model, describing context-specific behaviors as the link between general CCC and intercultural job performance. In the same way, we seek to offer a mechanism that will clarify acculturation goals for individual assignments, allowing managers to precisely identify what type of person will be the best fit for an assignment and what cross-cultural skills and competencies that person will need. Clarification of acculturation goals will lead to the utilization of more focused methodologies to reach acculturation goals.

Managers likely understand that acculturation needs and adaptation challenges are different due to the diversity of expatriate assignments. Despite this, academic literature surrounding expatriation has not yet fully addressed how expatriates and MNEs should conceptualize the goal of expatriate acculturation and how this relates to CCT. We now look at a final example from a 2006 review of CCT research by Littrell et al. (2006), which states the following to summarize the position of extant literature on expatriate language acquisition:

Although ideal, it is not critical that the individual become fluent in the language. Rather, the training focuses on providing expatriates with the ability to exchange common courtesies in the host language. Host nationals will appreciate these small efforts at speaking the language because it is a demonstration of interest in the host nationals and in the culture in general. (p. 370)

This illustrates that if general acculturation is the goal of CCT, then CCT goals will remain general as well. The above suggestion about language acquisition, while likely helpful in some cases, would be misleading to an expatriate whose role did require great fluency in the national language or if the assignment required no language skills whatsoever. In the first case, the expatriate would be unprepared to execute his or her assignment, and in the second case, the expatriate would have wasted time, energy and MNE funds on pointless language classes. A three-month assignment in a subsidiary to assess safety compliance requires different skills and training than a long-term managerial post in that same subsidiary. This summary statement on expatriate language acquisition is decontextualized for the sake of generalization but is too general in nature to inform a specific manager trying to effectively train and send an expatriate for a specific assignment.

The fact that different assignments require different skills shows how viewing the concept of acculturation as a degree, where simply achieving a higher degree is the goal, may not provide a targeted enough goal for either expatriates and their managers to effectively conceptualize the assignment and strategically select and train expatriates. Identifying a fixed position for the expatriate to occupy in relation to the host culture that is in line with the goals of the expatriate assignment with temporal and financial limitations considered will clarify the nature and degree of acculturation that needs to take place for the expatriate and their managers. We propose that acculturation can be conceptualized as a change in the position of the expatriate from an unsuitable position to a more suitable position in relation to the HCNs. Research theory and methodology from the fields of anthropology and ethnography can help the IB research community, and IB managers alike, to understand positionality and how this concept can be applied to expatriation. A “position,” as defined by ethnographic researchers, can serve as a useful acculturation goal for expatriate workers.

Positionality and reflexivity
Researchers in the field of ethnography and other social sciences have realized that true objectivity in fieldwork is not possible, as each researcher brings their unique background
and presuppositions into their research (Madison, 2011; Milner, 2007; Robben and Sluka, 2012). This shift is also described as “post-critical ethnography” or “critical ethnography” (deMarrais and Lapan, 2003; Hesse-Biber and Leavy, 2008). In short, researchers and their research cannot be fully separated, meaning that true objectivity is not possible.

Modern ethnographic researchers practice what is called “reflexivity” (Alvesson and Sköldberg, 2017; Finlay, 2002; Foley, 2002). This research tool is used to examine their position in relation to research subjects to determine how their findings may be influenced by stable traits such as ethnicity, nationality or sex, and dynamic traits such as language ability, time spent learning the context and motivations for research (Finlay and Gough, 2008; Foley, 2010; O’Reilly, 2012). These distinctions that can cause bias in research and data analysis are particularly pronounced in cross-cultural ethnographic research for many of the same reasons that cross-cultural management, and research in the field, can be more challenging given the cultural and linguistic differences (Guttormsen and Zhang, 2016; Mutua and Swadener, 2004; Nagata, 2004; Pudelko et al., 2015). The most common positions for a researcher at the beginning of research projects in this body of literature are that of an “outsider” or an “insider” in relation to the person or group being studied (Bruskin, 2018; Cassell and Symon, 2004). The researcher is either an “insider” who is a member of the community being researched or an “outsider” who is not a member of the community being researched. These two positions, according to debates in the literature, come with certain pros and cons, and the position that is viewed as optimal depends on the nature of the research and its objectives (Bonner and Tolhurst, 2002; Brannick and Coghlan, 2007). Often, as ethnographic field researchers practice reflexivity, many realize and record that they are no longer true outsiders nor true insiders but rather have come to occupy some sort of middle ground between their original position and the position of their subjects (Breen, 2007; Bucerius, 2013; Dwyer and Buckle, 2009; Keikelame, 2018). They have learned, empathized and begun to think about the research context in new ways. They have, in other words, experienced some degree of acculturation and have begun to change positions in relation to the person or community being studied.

The voluminous research into the concept of distance and its relationship to negative outcomes suggests that IHRM researchers and managers alike understand that the position of an outsider is usually suboptimal for expatriate assignments and counterproductive to assignment goals. Much of the research has not yet advanced past the point of suggesting that an expatriate needs to be less of an outsider or simply acculturated to their new work environment to a greater degree.

The following section will examine five research positions drawn from ethnographic literature, along with practical examples of what an expatriate might look like occupying each position in relation to the HCN. Then, we move on to a practical discussion of how the theory of positionality can inform how managers and researchers define the goal of acculturation, expatriate selection and CCT. Finally, we will present a new theoretical model to encourage and guide future research.

Types of insiders. Banks, 1998; Bucerius, 2013, provide five helpful positions of a researcher that can be applied to expatriates in their assignments as a result of their studies of positionality. The first position is that which is occupied by an HCN followed by four potential positions that could be occupied by expatriates. The name of the position is given along with a description and a hypothetical example of an expatriate who could occupy such a position.

The indigenous insider is one “who endorses the unique values, perspectives, behaviors, beliefs, and knowledge of his or her indigenous community” and “who can speak with authority about it” (Banks, 1998, p. 8; see also Katz-Buonincontro, 2018; Koen et al., 2017; McIntosh and Coster, 2017). This position is that of an HCN.

Example: an HCN coworker, supervisor or subordinate of the expatriate.
The external insider both rejects much of their indigenous community and endorses those of another culture to become “an adopted insider” (Banks, 1998, p. 8; see also Greene, 2014; Xu, 2017). An expatriate occupying this position would be extremely socialized to his or her host country context. This worker would likely possess high linguistic and cultural competencies because of rigorous training and extensive experience living and working among HCNs. This expatriate’s leadership style and worldview are different from the average member of his or her home community and country due to a process of rejection of previous views and endorsement of new host community views. The host community may view this person as more of an insider than an outsider.

Example: a Filipino attends university in Malaysia, becomes highly fluent in the national language, converts to Islam and marrying locally. This individual, after returning to work for some years in Manila, is sent on an extended assignment to work in Malaysia.

*Types of outsiders.* The indigenous outsider “has experienced high levels of cultural assimilation into an outsider or oppositional culture” but remains connected with his or her indigenous community (Banks, 1998, p. 8). This position is different from the external outsider in that the expatriate has not rejected any of his or her own home community. This worker likely has a high level of fluency in the local language and can navigate complex social situations due to experience and rigorous training. The host community may still view this individual as more of an outsider than an insider (Hohaia *et al.*, 2017; Ryan, 2015).

Example: a Swedish civil servant works for many years in the Swedish embassy in Germany. This worker is extremely fluent in German and well versed in German culture. This expatriate serves as a cultural advisor to Swedish diplomats.

The external outsider is “socialized within a community different from the one in which he or she is doing research” (Banks, 1998, p. 8; see also Adorjan, 2016; Butenina, 2015). This expatriate has not acculturated in any way to the host community and possesses no local language competency or knowledge of local customs and leadership styles. This worker will act in every way as if still working in his or her home context.

Example: this is the position of a selected expatriate before any degree of acculturation takes place. The soon-to-be expatriate has been socialized exclusively in a different community than that of the HCNs. Until some acculturation occurs, the worker remains an external outsider.

The trusted outsider is an “outsider trusted with ‘inside knowledge’ who may provide the ethnographer with a different perspective and different data than that potentially afforded by insider status” (Bucerius, 2013, p. 690). This is a position reached where an individual, socialized in a different community than the one being studied, has built enough trust and understanding with members of a new context that the effects of being an “outsider” have been mitigated (Joosse *et al.*, 2015; Morosanu, 2015).

Example: an expatriate worker, while not yet an indigenous outsider, has acculturated to the point where trust sharing and knowledge sharing are commonplace between the expatriate and HCNs. This worker is able to understand the rationale for both HQ decisions and the HCNs’ concerns with how those choices may or may not work well in the local cultural context.

**General discussion**

Drawing from ethnographic research and other social sciences, this conceptual paper suggests that the ideal, future position of an expatriate in relation to HCNs should be identified prior to expatriate selection. The position should then be used to inform the selection and CCT program for the expatriate worker, resulting in a worker who is positioned appropriately, in relation to HCNs, to fulfill the goals of his or her assignment. With the ideal position in mind, an expatriate and their managers have a clear acculturation goal. Once the ideal position
is selected, managers can allow the goal, moderated by time and financial limitations, to inform selection and CCT program construction and rigor. Knowing what position the expatriate will need to occupy in relation to the HCNs will make much clearer what language skill, cultural knowledge and leadership styles, if any, are needed for assignment success. In the following section, practical examples of job assignments and the positions in relation to HCNs needed for success are given, along with implications for selection and CCT in these specific examples. Finally, we will introduce a theoretical model for use in future research and discuss limitations.

Example assignments

**Example assignment 1: the managerial trainee.** A British soon-to-be expatriate is an external outsider who needs to occupy a different position in relation to HCNs in China. This will allow her to travel, build comradery and learn from local subsidiary managers. For this assignment, the expatriate needs to move closer to the sphere of the indigenous outsider. Since this assignment is short term and time sensitive, the expatriate needs to acquire just enough to accomplish the goals of the trip, which are primarily to learn and observe. In the weeks leading up to the trip, this businesswoman should learn the basics of Chinese immigration laws and intra-national transportation options, so that she can travel to her assignment location safely and legally. She would also benefit from instruction on office etiquette and building trust and comradery in this unfamiliar culture to avoid early offenses and relationally damaging speech and behavior. Language training is not practical or necessary due to the short-term nature of the assignment, the low level of responsibility and the high level of English spoken by many of the employees. Since acculturating to the position of external insider is not possible in a short period of time, this expatriate makes it her goal to become more acceptable in the host culture. While this individual is not yet a business expatriate, she does occupy the position of external outsider in relation to Chinese HCNs. We will define her positional goal as the trusted outsider. Through training resources and previous expatriate interviews, this trainee learns enough before her new assignment to immediately build rapport with HCNs. Her understanding of Chinese business culture, while mostly theoretical, helps her build trust quickly. Her position as a student of her company’s subsidiary activity allows her access to information typically only shared between HCNs.

Ideal position: Trusted Outsider.

**Example assignment 2: the bearer of corporate culture.** A Korean-based MNE has recently purchased a manufacturing facility in Ukraine. MNE executives now plan to send an expatriate with a challenging assignment – to infuse corporate culture and standards in every worker at the factory and to completely overhaul the organizational chart to more closely resemble the worldwide preferences of the Korean MNE. None of the current Ukrainian employees have facility in the Korean language, and the factory has been manufacturing products that differ from the future planned products of the MNE for many years. Human resources and accounting practices will also be overhauled completely. This challenging assignment demands for a worker or team of workers who are positioned as indigenous outsiders or external insiders. In light of this, the Korean MNE may decide to select a worker, either inside or outside the firm, whose current position is closest to the desired position and then train this worker in corporate best practices, rather than selecting an external outsider and training them with CCT and language training. The candidate will likely need to already be familiar with the Ukrainian language, culture and legal environment if the MNE desires to bring about change in this Ukrainian factory quickly. To execute this assignment, the expatriate may need advisors from human resources, accounting and manufacturing, and will likely require coaching and mentoring while on the job. If properly selected, trained and supported, this expatriate
will grow into the position of indigenous insider, experiencing high levels of acculturation and, in time, successful execution of MNE goals. Management should also expect that accomplishing assignment objectives will take considerable time since achieving the desired position in relation to the HCNs will be time intensive. We define the ideal position for this assignment as the indigenous outsider. An HR staffing firm identifies an experienced Korean national who has provided leadership to Ukrainian manufacturing operations for the last 12 years. This individual is recruited to work for the MNE and given rotating assignments for six months to become familiar with the organizational culture. This individual, who has already experienced high levels of acculturation, then moves back to Ukraine and is able to execute assignment goals very quickly. The greatest challenge for MNE management is not local culture but ensuring that the expatriate has a clear grasp on organizational culture and objectives.

Position reached: Indigenousness Outsider.

These two example assignments show how clearly identifying the ideal position of the expatriate worker in relation to the MNE and HCNs informs expatriate selection and CCT. The expatriate selection process will likely focus on the expatriate’s perceived ability to reach the desired position or current proximity to the ideal position. This may include previous experience, cultural intelligence, skills, sex, marital status and language ability. Some common selection criteria for expatriates may become less important once the ideal position is identified. The selection and CCT strategy will be contextual rather than general, focused on the specific needs of the assignment and will describe how the expatriate will bridge the “gap” between their current position and the ideal position in relation to HCNs. We now put forward a model to be used as a mechanism to identify the ideal position for the expatriate and show how selection and training can be used as “bridges” to move the expatriate into the ideal position.

The positionality gap model (PGM)
Potential expatriate workers (pre-departure) who have experienced no acculturation are categorized as external outsiders. The proposed PGM, shown in Figure 1, shows the gap between the position of the average external outsider employee from MNE headquarters (HQ) and the typical position of a subsidiary employee or HCN (indigenous insider). The MNE selects the ideal future position of an expatriate in relation to the HCN by considering the assignment expectations, as well as HCN and subsidiary cultural information, and then devises a plan for selection, job-skills training and CCT to facilitate the expatriate’s acculturation. This could be, for example, the position of indigenous outsider. The expatriate, in time, will bridge the “gap” between his or her current position, the external outsider, and the ideal position, the indigenous insider or an expatriate close to the ideal position could be selected for the assignment. Once this process is complete, the expatriate should be able to fulfill assignment goals and communicate appropriately with HCNs, provided that they are able to maintain the ideal position. In the PGM illustrated in Figure 1, the bridge sections of selection, training and maintaining position all have potential obstacles, and some examples of these potential obstacles are provided below their corresponding bridge sections. Formal and informal feedback from the HCNs, the expatriate and subsidiary performance reviews can inform the MNE regarding the proposed expatriate positional goals, the effectiveness of selection and CCT, and the HCNs’ response to the position of the expatriate. With clearly defined acculturation goals, the MNE and researchers can evaluate expatriate success based on the effectiveness of bridge sections 1, 2 and 3.

Figure 1 shows the PGM.

Figure 2 uses the same model with context-specific information from the previously discussed “managerial trainee” example. Notice how MNE HQ and subsidiary cultural information is now context specific to the UK and China. The selection, training and
maintenance sections show specifically how the MNE and expatriate can make more strategic, context-specific decisions once the ideal position is identified. Figure 2 shows how an MNE might select and train an expatriate to occupy the position of trusted outsider in relation to Chinese HCNs.
Figure 3 uses the same model with context-specific information from the previously discussed “bearer of corporate culture” example. Notice how MNE HQ and subsidiary cultural information is now context specific to Korea and the Ukraine. The selection, training and maintenance sections show specifically how the MNE and expatriate can make more strategic, context-specific decisions once the ideal position is identified. Figure 3 shows how and MNE might select and train an expatriate to occupy the position of indigenous outsider in relation to Ukrainian HCNs.

Conclusion
The PGM, created by combining theoretical and methodological contributions from ethnographic and HRM research, will aid researchers and managers in conceptualizing expatriate assignments and selecting an assignment-specific position in relation to HCNs that should be occupied by the expatriate. This specific acculturation goal will inform selection, CCT, job training and support plans. This theoretical model, when applied, has the potential to make MNEs’ selection practices, CCT programs and support plans more effective, efficient and context specific. The expatriate and their managers will have a clear goal before and during their assignment and can more clearly evaluate successful acculturation using the preselected position as a benchmark.

Limitations
We suggest positionality not as an entirely new area of research in expatriate literature but rather an area in need of greater theoretical clarity and empirical investigation. The concept is implied in other research, although it may not have been the primary focus. The theory brought forward in this conceptual paper assumes that an ideal “position” can be identified and reached by an expatriate. It is possible that, in many cases, the expectations of the MNE and preferences of HCNs may be in conflict. Expatriate acculturation is a complex and fluid phenomenon, and the precise abilities needed to fulfill the goals of an assignment may be
fluid as well. In some cases, the ideal position may change throughout the assignment as new variables come in to play. The true value of this theoretical contribution needs to be empirically tested and cannot be known without empirical research. Additionally, it is possible that this concept, or something very similar, could have been drawn from other fields of study. We chose the social sciences, and specifically ethnography, because it is a field that has sought for decades to understand how an individual’s position in relation to the individual or group being researched might affect data collection and analysis. Ethnographers’ deep understandings and debates in literature, across many contexts, provide rich sources of understanding that can be applied to expatriate acculturation.

Finally, this is intended to be one tool used in the study of expatriation. It is meant to clarify and build upon not nullify existing theory. A final limitation is that, to reduce the scope of this paper, the position of the expatriate in relation to the MNE was not discussed.

**Suggestions for future research**

To test this theory, researchers must first learn how to define the ideal position for an expatriate assignment. Testing this theoretical framework could be accomplished in a variety of ways. Research could retrospectively examine the effects that identifying an ideal position have on CCT, acculturation and assignment success by interviewing managers and expatriates and testing those expatriate workers who had a clear understanding of their desired position against those who did not. A researcher could also examine the differences in success rates between expatriates who reached the ideal position against those who did not. Another option would be a qualitative ethnographic research study on expatriates to identify their position after significant acculturation has taken place. The results could be used to shed light on how positions are reached and inform CCT and selection. To limit the scope of this paper, only existing positions from ethnography literature have been discussed. More positions will aid selection and CCT for more varieties of assignments. For example, a position named “the acceptable outsider” might be the desired outcome of CCT for business travelers and correspond with the need for basic cross-cultural understanding when traveling internationally for business reasons. More qualitative research is needed to better understand how the concept of positionality relates to expatriate acculturation. Then, rigorous quantitative research can shed empirical light on the importance of this model. This model opens up many avenues for further testing, research and criticism of the concepts introduced in this paper. Finally, it could be that a closely related concept would be more helpful than the PGM. We welcome critical suggestions of more appropriate ways the problems outlined above can be addressed.

**References**


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Expatriate acculturation
Telling tales
Using narratives and story-telling to understand the challenges faced by a sample of self-initiated expatriates in South Africa

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Abstract
Purpose – South Africa has witnessed an increase in self-initiated academic expatriates (SIAEs) coming into the country from all over the world. This movement of labour can result in South Africa performing better than any other African country. However, expatriation is accompanied by several challenges which affect both work and non-work scopes. Given that more is needed to understand the lived experiences of the expatriates, especially self-initiated expatriates from and in Africa, the purpose of this paper is to provide the basis for interventions to assist the expatriates in overcoming challenges by understanding their lived experiences.

Design/methodology/approach – The study used an interpretivist approach to understand the lived experiences of SIAEs. The data were collected through the use of unstructured interviews of 25 expatriate academics within South Africa. The individual narratives were analysed through structural and thematic analysis to develop themes.

Findings – Through the stories and narratives, the expatriation experience was one framed to be a challenging process. The lived experiences can be grouped into life and career experiences. The life experiences consist of immigration difficulties, family separation, social adjustment difficulties and unavailability of accommodation. Career experiences include remuneration differences, gender discrimination, limited professional development opportunities and communication difficulties, which affect both work and non-work experiences. Person–environment fit did not play a significant role in the experiences of the academic expatriates.

Practical implications – The findings showed that the lived experiences of SIAEs in Africa were mostly negative. Higher education institutions looking at hiring academic expatriates should assist the expatriates to have better experiences not only for individual benefit but for institutional benefit as well. However, this role is not only placed in the hands of the organisation but may also require individual effort.

Originality/value – The findings outlined in this study provide a picture of the lived experiences of SIAEs in an African context. The findings are fundamental in understanding this neglected sample group in the extant literature. They also assist in advancing literature and proposing possible solutions. All this is important, given global talent shortages which have warranted the need for highly skilled employees in countries like South Africa.

Keywords South Africa, Academic mobility, High skilled labour, Person–environment fit theory, Self-initiated academic expatriate

Paper type Research paper

1. Introduction
Individuals are looking beyond their home countries for careers, which can be attributed to globalisation and leading to the notion of a career being seen as boundaryless (Suutari et al., 2018). Migration is regarded as a possible opportunity for subsistence, especially in Africa, due to factors such as civil wars, economic challenges, and political and social instability (Harry et al., 2017; Kim et al., 2018; Ng and Bloemraad, 2015). As a result, several forms of
global employment are on the rise (Brookfield Global Relocation Services, 2016). One of these forms is expatriation. Expatriation should be considered within the context of global changes because of the territorial boundaries that have become temporary and penetrable, whereby unpredictability is regarded as part of this experience of constant changes and adjustment to the career and personal trajectories (Clark and Altman, 2016).

There are two broad forms of expatriation, i.e. assigned expatriates (AEs) and self-initiated expatriates (SIEs). AEs move because of arrangements made by their parent company while SIEs initiate their own movement (Jonasson et al., 2018; Lauring and Selmer, 2018). The major difference between AEs and SIEs is the initiative to relocate (McNulty and Selmer, 2017; Selmer et al., 2015, 2018). This study focused on SIEs, in particular, self-initiated academic expatriates (SIAEs). The mobility of academics incorporates self-initiated expatriation, transnational mobility initiated by the university and temporary and permanent migration (Kim and Locke, 2010). Based on previous research, this study posits that an academic expatriate is an individual who has moved across national borders to take up legal, but time-bound long-term employment in the higher education sector, either for a teaching or research role in a university environment (Andresen et al., 2014; Jonasson et al., 2018; Richardson and McKenna, 2003; Siemers, 2016).

This supports the protean career concept that was introduced by Hall (1996). Hall claimed that careers are being driven by the person, and not the organisation. Self-initiated expatriation, evidently, has become a major trend among academic expatriates who choose self-expatriation to teach in foreign countries (Jonasson et al., 2018). The number of expatriate academics in the world is increasing but the research on these expatriates remains limited (McNulty and Selmer, 2017; St Germain, 2017). Most of the discussions around the concept of SIEs and SIAEs have been conducted in Europe (Jonasson et al., 2018; Kim et al., 2018; Lauring and Selmer, 2018; Selmer and Lauring, 2010, 2016; Shortland, 2018). It is, thus, important to understand the perspectives and experiences of SIAEs from developing countries (McNulty and Selmer, 2017). Hence, this study focused on SIAEs from other African countries in South Africa who moved on their own initiative pushed by political and economic conditions in their home countries and pulled by the opportunity to further their studies in South Africa (Harry et al., 2017).

This study explored the lived experiences of academic expatriates which include their work and non-work challenges, at a rural university in South Africa. This context is relevant because of high unemployment rates in the country and limited literature on SIAEs in the African context. This study contributes to the understanding of the challenges that are faced by academic expatriates in the South African context. The findings of this study show that the SIAEs in South Africa are facing challenges that are not usually faced by most expatriates in the other parts of the world. Most of the experiences are negative but the SIAEs remain motivated to continue working because of political and economic conditions in their home countries. By understanding these experiences, given the local high skills shortage, universities will be able to deal with some of the challenges faced by academic expatriates and benefit more from their services.

2. Theoretical framework
SIEs usually lack initial support from the home country organisation (Andresen et al., 2014). Due to this lack of initial support, personal characteristics are believed to be particularly important (Lauring and Selmer, 2018). These personal characteristics include trait anger, which is viewed as one of the basic human emotions (Lauring and Selmer, 2018) and self-control, which is arguably the ability to adapt and change to fit self to the external world (de Ridder et al., 2012). The process of adjusting to a new environment is emotionally challenging and, hence, the need for the aforementioned personal characteristics. Expatriates, in general, deal with several stimuli prompted by different environments...
and cultures which contribute to high levels of stress, dissatisfaction, disengagement and turnover (Andresen et al., 2017). The relationship between people and the environment has been explained by the person–environment (PE) fit theory (Abur, 2014; Lauring and Selmer, 2018). The theory addresses the compatibility between employees and the environment which they find themselves working. Further research has subsequently classified the theory as specific to the person and the organisation (P–O) fit, the person and the job (P–J) fit, and the person and the group (P–G) fit, which will be the focus of this study.

P–O fit is defined as the congruence between employees’ values and goals and the values, norms and goals of an organisation (Su et al., 2015). Experiencing such a correspondence is believed to result in perception of social inclusion and emergence of intention to stay (Van Vianen et al., 2013). Previous studies have argued that a person who experiences P–O fit has a high job satisfaction, high organisational commitment and has less work stress (Chen et al., 2016; Deniz et al., 2015). P–G fit is described as the compatibility between a person’s work group and their goals, interpersonal preferences, personality and values (Su et al., 2015). It also entails work-based relationships (social interactions) and working together of employees (interdependence) (Glew, 2012). P–J fit is the correspondence between personality and job characteristics. It involves demands-abilities fit which occurs when the job demands are met by the person’s skills, abilities and knowledge. It also entails needs-supplies fit which occurs when a job meets the needs of the employee (Kristof-Brown and Guay, 2011). Research indicates that people perform better in environments which are compatible with their personal characteristics (Shipp and Jansen, 2011; Su et al., 2015). The aim of this study was, therefore, to understand the effects of P–E fit on the experiences of the expatriates looking at the factors discussed above. The experiences of the SIAEs are influenced by both work and non-work-related circumstances. In this study, this framework is used to understand how the environmental and personal dimensions affect the behaviour of SIAEs, given the various negative environmental challenges in South Africa such as high unemployment rates, high crime rate and xenophobia.

3. Experiences of expatriates
Settling in a new country is a process that, due to several reasons, is challenging and emotionally difficult (Haslberger et al., 2013). This involves exposure to environments that are unfamiliar, trying to establish new social support structures, becoming accustomed to a foreign language, culture, core values and rituals (Andresen et al., 2017; Pudelko and Tenzer, 2018; Selmer and Lauring, 2016; Volk et al., 2014). Expatriates face difficulties in adjusting to new countries especially when the surroundings are unfamiliar (Abur, 2014; Andresen et al., 2014; Hussain and Deery, 2018). Furthermore, lack of mutual support and social networks from the expatriate community is a challenge that leads to difficulties in adapting to the new culture (Clark and Altman, 2016; Yokoyama and Birchley, 2018).

Expatriation can cause a culture shock which involves emotional perplexity due to new environments which are unfamiliar (Abur, 2014; St Germain, 2017). Culture shock can cause anxiety, exhilaration and unacceptable behaviour as per norms of the host country, depression and isolation, and these factors will result in poor job performance (Abur, 2014). Language differences can also cause problems for both the expatriates and local employees when clear communication is required (Abur, 2014; St Germain, 2017; Suutari et al., 2018; Tenzer and Schuster, 2017). A need to speak a second language that is not well-known to an individual will lead to disengagement and stress especially for local employees who will have to accommodate expatriates (Jonasson et al., 2018; Volk et al., 2014).

Expatriates and their families require multiple forms of support from the organisation to adjust to the new environment (Takeuchi, 2010). AEs usually receive support from the organisation as they will be transferred by the organisation for an international assignment (Lauring and Selmer, 2018). However, SIEs do not receive such support from the organisation.
as they initiate their own expatriation (Chen and Shaffer, 2017; Kim et al., 2018). Due to a lack of organisational support, SIEs face difficulties which are not faced by AEs. Cao et al. (2014) suggested that there is a positive relationship between perceived organisational support and intention to stay among SIEs and that without adequate organisational support, SIEs may leave their employment. Previous research has also shown that careers of SIEs are stagnant because of absence of effective human resources management strategies for SIEs (Rodríguez and Scurry, 2014).

SIEs utilise their own resources to live and work in a foreign country. SIEs, thus, do not benefit from company relocation benefits such as housing or any other support to assist them to integrate into unfamiliar surroundings. Lehn (2016) further argued that SIEs are generally remunerated on less generous local packages than AEs who have contractual specifications and generally earn more. SIEs generally do not receive packages, before and upon arrival for employment, compared to AEs who do receive such packages (Jonasson et al., 2018). Furthermore, and again unlike AEs, SIEs usually face barriers in areas such as acquiring work visas (permits) and immigration in the host country (Lehn, 2016; Selmer and Lauring, 2010). In addition, SIEs have a perception that they might lose their current jobs at any time, i.e. job insecurity (Fontinha et al., 2017). SIEs are usually employed on short-term contracts (Austin et al., 2014). SIEs are regarded as less expensive and more easily accessible to employ than AEs (Tharenou, 2013).

There is pay disparity between local professionals and expatriates (Harry and Dodd, 2016; Okeja, 2017). Welch (2003) suggested that AEs earn more than locals, despite holding the same qualifications. Furthermore, AEs generally receive additions to their remuneration packages which local employees and SIEs do not receive (Dickmann, 2014; Lauring and Selmer, 2018; McNulty and Selmer, 2017). On the other hand, Grelecka (2016) suggested that SIEs may accept lower rewards due to economic hardships in their own countries. Although remuneration is not the main driver of expatriation (McNulty, 2014), it is typically ample and substantial (Kim et al., 2018; Kroeck and Von Glinow, 2015). Expatriation is usually unattractive to many people due to factors such as family separation and relocation; thus, to offset these negative issues, organisations have to offer additional income (Kim et al., 2018; Shortland, 2018). Rewards are, thus, imperative for the retention of expatriates.

SIEs are regarded as individuals with skills such as high self-confidence, technical skill, adaptability and flexibility, which enable them to secure employment in the host country (Ceric and Crawford, 2016). Previous studies have indicated that SIEs are more easily able to adjust to non-work factors, because of interaction skills, than AEs mainly due to self-reliance and motivation (Tharenou, 2013; Mo and Yong, 2015). The adjustment process is important because of three basic human needs: need for predictableness and order (sense making), need for recognition and to be accepted (interactions), and need for authority and status (achievement of job objectives) (Shaffer et al., 2006). However, Karaba (2015) noted that there is no standard adjustment pattern, but SIEs adopt different coping strategies which include problem solving and spirituality/religious ways, which are regarded as a taboo in the western culture. Fontinha et al. (2017) further argued that career-oriented human resources management practices are important for the adjustment of SIEs as such practices are related to perceived job security and internal employability. Ballestros-Leiva et al. pointed out that subjective well-being, work and personal life conflicts are more negative among SIEs than among AEs.

In sum, while AEs and SIEs share some similarities regarding family commitments, cultural adaptation, lack of job security, strain of relationships, feeling of foreignness, loss of familiar social relationships and spouse willingness, they are largely different. There is substantial literature on AEs; however, its applicability to other mobile workers such as SIAEs has been questionable (Jonasson et al., 2018; Kim et al., 2018; Richardson, 2006). SIEs work in various industries and sectors. This study focused on SIAEs or academic expatriates.
Academic expatriates, as skilled workers, face unique challenges that are related to the cognitively demanding workload (Lauring and Selmer, 2015). These expatriates have multiple work demands such as teaching, research, community services as well as having relationships with students and co-workers. Above all, the academic expatriates are expected to adapt to the new environment while maintaining high standards of performance (McNulty and Selmer, 2017). It is thus clear that academic expatriates are different from ordinary SIEs, hence, to understand their lived experiences in a foreign country.

Academic expatriates in the discourse of mobility fall within the context of highly skilled individuals. Universities, just as corporations, are relying on expatriates for achievement of goals (Lehn, 2016). Cross-national mobility is expanding among academics due to the high degree of autonomy in their duties which are alike in different countries (Froese, 2012). The mobility of academics, for short and long-term assignments, is facilitated by international branch campuses, but other academics seek such opportunities independently, i.e. SIAEs (Lehn, 2016). Previous studies (e.g. Altbach and Knight, 2007; Kim, 2009) have outlined primary forces enhancing academic mobility to factors such as language of instruction, i.e. English, lucrative salaries, poor labour market in the home country, and perceived better job security overseas.

Kurka (2007) suggested 21 categories for factors motivating the decisions of highly skilled individuals. The mobility factors are attributable to “push and pull factors at micro and macro levels; individual and aggregate levels; endogenous or exogenous groups; external barriers or obstacles to migration; intrinsic motives, motivations and goals; as well as personal reasons, attitudes and character traits” (Kurka, 2007, p. 496). The 21 categories include factors such as income and monetary considerations, political reasons and civil conflict, immigration policy and legislation, and employment opportunity and labour market. Although Kurka’s study focused on highly skilled individuals in Austria, his findings can be used to examine other groups (Lehn, 2016) such as SIAEs in the African context.

Academic expatriates are facing difficulties while abroad. Some of these difficulties are related to the working conditions, e.g. devaluation of their contributions on a regular basis and being excluded from important networks that might result in publication or research grant opportunities and limited opportunities for professional development (Skachkova, 2007; Munene, 2014; Trembath and Herbert-Hansen, 2017) and discrimination in the form of ethnocentrism, racism and sexism (Hildisch et al., 2015; Skachkova, 2007).

Exclusion is more pronounced among women academic expatriates in general than among men which is mainly due to gender discrimination and hostility towards women in host countries (Abur, 2014; Shortland, 2018). Such gender inequality results in low job satisfaction and frustration among women (Bader et al., 2018). Moreover, women academic expatriates face challenges of coping with loneliness, managing work time, family concerns, limited female networks and balancing work and life (Shortland, 2018). Although this is experienced by both local and expatriate women, it is more pronounced among academic expatriate women due to a lack of social support in the host country. Jonasson et al. (2018) claimed that the difference that exists between local employees and academic expatriates relates to the novelty faced by academic expatriates at the destination, which is an area requiring further research.

There are significant gaps in academic mobility as was suggested by Kim (2009) “there have been no full-scale (or in-depth) specific investigations on the international/transnational mobility of ‘university academics’ and the recent changes in academic staffing along with national higher education policies on globalisation. Apart from the foreign manager-academics who receive media attention, little is known about foreign academics’ lived experiences” (p. 400). Furthermore, O’Hara (2009) also argued that most existing literature is limited to academics who are affiliated to the host institution in their destination. These studies fail to account for SIAEs who comprise most of the international academics’ population (Lehn, 2016). This population is gradually becoming significant in the international human resources management field. This study, therefore, focused on contributing to the literature of experiences of SIAEs in the African context.
4. Research purpose and objective
Given the need to address the life and career challenges of SIAEs, especially in the African context, this study aimed to understand the lived experiences of the SIAEs who relocate to South Africa. This study, therefore, aimed to answer the following questions:

RQ1. What are the lived experiences encountered by SIAEs in the South African context?

RQ2. How do they make sense of these events?

5. Research context
Many people in developed countries are looking beyond their home countries for career and development opportunities (Kim et al., 2018). Wealthier regions attract people from poorer countries, which is also common in Africa. Several African nationals are moving in search of better lives and opportunities to further studies, often pushed by the worsening economic and political conditions in the home countries (Harry et al., 2017; Richardson and McKenna, 2003).

Africa, with regards to mobility, is generally regarded as the major sufferer of the so-called brain drain (Maharaj, 2017). Most of the highly skilled, including academics, move to more developed countries in Europe and North America (Lee and Schoole, 2015). Amid this high brain drain, the role of South Africa in building international human capital has been overlooked (Maharaj, 2017). South Africa is considered one of the most developed countries in the region (Maharaj, 2017), which accounts for its brain attraction (Lehn, 2016). Most people in the Southern African Development Community region and other African countries are choosing South Africa as a preferred destination, which make the country a worthwhile case study for the mobility phenomenon. The country is viewed as an emerging market with middle-income households (Crush et al., 2005), so several academic expatriates are taking up employment with South African higher education institutions, despite the high unemployment rates among the locals due to their lack of skills (Magagula, 2017).

The South African higher education system is regarded as the strongest and largest in Africa (Lee and Schoole, 2015), but the universities face a multidimensional crisis in recruiting and retaining academia staff (HESA, 2011; Jansen, 2017). Academia is regarded as an unattractive career in South Africa (HESA, 2011), subsequently, to attract and retain highly skilled individuals, the South African Government implemented measures such as offering work permits (visas) to PhD international graduates from South African universities (Department of Higher Education and Training, 2017). The demand for academic expatriates is high as the country lacks qualified Black academics (Jansen, 2017). The country is, thus, relying on African SIAEs for human capital development. Foreign nationals are, however, being subjected to xenophobic attacks because of high unemployment rates and poverty among the locals (Kang’ethe et al., 2016; Tella, 2016). Regardless of the adversities, both skilled and unskilled people from poor countries continue to choose South Africa as a preferred destination.

6. Research design
This study addressed the following questions:

RQ1. What are the lived experiences encountered by SIAEs in the South African context?

RQ2. How do they make sense of these events?

People are storytellers who ascribe different meanings to social experiences (Levitt et al., 2018, 2017). Hence, in order to understand the experiences of SIAEs, the study employed a
qualitative exploratory research approach. This approach allowed the participants to share their experiences in their own words (Levitt et al., 2018) without any predefined limitations or constraints.

Unstructured interviewing was deemed appropriate for this study because of limited extant literature in the African context. Therefore, several unstructured interviews were conducted to gather the data, allowing the participants and researchers to reflect and clarify responses under less structured conditions (Chinyamurindi, 2016a, b, 2017, Harry et al., 2017; Levitt et al., 2017, 2018; Reddy, 2016). The aim was to obtain a detailed account of SIAEs' lived experiences and events. As humans, people define themselves through the narrated stories about themselves, so stories are an imperative in understanding their lived experiences (Gramer, 2017). Hence, unstructured interviews were chosen as a data collection method for this study.

The interviews were conducted by the principal investigator who is also an SIE. The participants were able to easily relate to the principal investigator because of the same status in South Africa. All the interviews commenced with the same question, i.e. “Tell me about yourself”. This allowed the participants to be at ease. The interviews were conducted in each participant’s office during working hours at a time when the students were protesting at the university where the study was conducted. The student protests made it possible for the interviews to be conducted during working hours. However, some students did come into the offices during the interviews, but this did not affect the flow of the interviews. The interviews lasted for an average of 50 min.

6.1 Sampling and participants
Participation was limited to SIAEs at a university in the Eastern Cape Province of South Africa. The same institution granted the ethical approval for the study. The principal investigator sent a generic e-mail to a list of 103 people generated from a directory of names provided by the HR department of the participating university. A total of 25 participants were selected through a combination of purposive and convenience sampling (Joshua-Gojer, 2016). Due to financial constraints, the researchers chose participants that were easier to access. However, the researchers ensured that the participants were indeed SIAEs from other African countries. The study was, thus, conducted with a total of 25 participants who indicated their availability and willingness to participate in the study. Participants were required to sign written informed consent that outlined confidentiality issues, potential benefits, usage of data collected and any risks associated with the research. The biographical characteristics of the participants are outlined in Table I.

6.2 Data analysis
As in previous research (e.g. Chinyamurindi, 2016a, b, 2017; Gramer, 2017; Harry et al., 2017), this study adopted a structural narrative analysis as was suggested by Labov (1982). This approach is mostly used for analysing the narratives and storytelling of individuals. The model was used to understand how the narratives were being told. A thematic analysis was employed to illuminate what was being narrated (Gramer, 2017) and to understand the individual experiences. The software of data management and analysis QSR NVivo 9 was used to assist with data analysis.

The transcripts were read several times by the researchers to familiarise themselves with the narratives and remove any commentaries that subverted the core narratives of the participants. The transcripts were e-mailed back to the participants for comments and confirmation of the main narratives from their interviews. The data were then analysed using two components from Labov’s structural analysis. First, the “complicating factors” were analysed, which looked at the actions and events that happened and affected participants’ lives and careers in South Africa. The aim was to understand how the events
had happened and how the events had affected the participants. Second, “evaluation” was analysed to understand how the participants made sense of all the events that had happened. This allowed the researchers to understand the meaning that the participants were trying to convey in their narratives. This was done by looking at the openly communicated opinions in the narratives. Evaluation allowed the researchers to understand the rationale behind the narratives.

After the narratives had been analysed independently, they were crossed checked for commonalities and differences to create themes from the narratives. The individual interviews were compared to each other to understand what themes emanated from the interviews. A table was constructed to illustrate the codes that emanated from the narratives for the development of themes. Therefore, narrative and thematic analysis were used to interpret the participants’ narratives, and thematic analysis was also used to organise the data into themes. The researchers were able to understand the how, what and why of the participants’ narratives.

6.3 Strategies to ensure data quality and reporting
To avoid researcher fatigue, the data were collected over a period of six months. Literature suggestions were followed to ensure data quality (Levitt et al., 2017, 2018), and included using direct quotes from the participants’ stories. The quotes represent the true accounts of

<table>
<thead>
<tr>
<th>Pseudonym</th>
<th>Gender</th>
<th>Marital status</th>
<th>Nationality</th>
<th>Age</th>
<th>Position</th>
<th>Previous job title</th>
<th>Years in South Africa</th>
</tr>
</thead>
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<tr>
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<td>Zimbabwe</td>
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<td>Student</td>
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<tr>
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<td>Student</td>
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</tr>
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<td>Student</td>
<td>9</td>
</tr>
<tr>
<td>Sue</td>
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<td>Married</td>
<td>Zimbabwe</td>
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<td>Chief economist</td>
<td>9</td>
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<td>Student</td>
<td>6</td>
</tr>
<tr>
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<td>40-49</td>
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<td>Student</td>
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<td>Lecturer</td>
<td>7</td>
</tr>
<tr>
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<tr>
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<td>Student</td>
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<tr>
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<td>DRC</td>
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<td>Lecturer</td>
<td>Student</td>
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</tr>
<tr>
<td>Lily</td>
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<td>Married</td>
<td>Uganda</td>
<td>60-69</td>
<td>Lecturer</td>
<td>Teacher</td>
<td>26</td>
</tr>
<tr>
<td>Robin</td>
<td>Female</td>
<td>Single parent</td>
<td>Botswana</td>
<td>30-39</td>
<td>Lecturer</td>
<td>Student</td>
<td>11</td>
</tr>
<tr>
<td>Ted</td>
<td>Male</td>
<td>Married</td>
<td>Zimbabwe</td>
<td>40-49</td>
<td>Associate professor</td>
<td>Teacher</td>
<td>16</td>
</tr>
<tr>
<td>Eve</td>
<td>Female</td>
<td>Married</td>
<td>Zimbabwe</td>
<td>30-39</td>
<td>Lecturer</td>
<td>Student</td>
<td></td>
</tr>
<tr>
<td>Angie</td>
<td>Female</td>
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<td>Zimbabwe</td>
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<td>Lecturer</td>
<td>Student</td>
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<tr>
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<td>Married</td>
<td>Nigeria</td>
<td>30-39</td>
<td>Senior lecturer</td>
<td>Student</td>
<td>10</td>
</tr>
<tr>
<td>Wayne</td>
<td>Male</td>
<td>Married</td>
<td>Kenya</td>
<td>60-69</td>
<td>Professor</td>
<td>Student</td>
<td>5</td>
</tr>
<tr>
<td>Emily</td>
<td>Female</td>
<td>Single parent</td>
<td>Nigeria</td>
<td>30-39</td>
<td>Lecturer</td>
<td>Student</td>
<td>7</td>
</tr>
</tbody>
</table>

Table I. Demographic characteristics of participants

71

Telling tales
the participants as no change or meaning was attributed to these quotes. Moreover, data were collected until the achievement of data saturation (Rubin and Rubin, 2012). Credibility was further enhanced by using data analysis methods that were used in previous similar studies (Chinyamurindi, 2016a, Gramer, 2017, Lehn, 2016). Trust between the principal investigator and participants was easily built as the investigator was an international student at the institution. This made it easier for the investigator as he had prior knowledge of the institution. To ensure honesty from participants when contributing data, the study only included participants who had indicated their willingness to participate in the study. During the interviews, iterative questioning and probing were used as tactics to better understand raised issues. The data analysis was conducted by two researchers to avoid bias and multiple analysis methods (i.e. structural and thematic analysis) were employed as aforementioned to avoid bias of using one analytical method (Gramer, 2017). The researchers read the transcripts over and over and later discussed the meanings that had been gleaned from the narratives.

7. Research findings
The data analysis generated two main themes, namely, life experiences as a result of expatriation and living in a foreign country, and career experiences caused by working in a foreign country. How the themes were developed is illustrated in Table II.

7.1 Life experiences resulting from self-initiated expatriation in South Africa
As a result of expatriation, participants had to alter the way they lived. Such experiences caused many challenges for the participants. Participants reported three main life challenges as outlined in Table III.

Due to push factors in their home countries, such as poor economic conditions, meant that the participants did not have an option but to look for better opportunities in a country like South Africa where they faced life and career challenges. Most of the participants pointed out that they, together with their family members, faced challenges from the

<table>
<thead>
<tr>
<th>Initial codes</th>
<th>Resultant themes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life experiences</td>
<td>Immigration difficulties</td>
</tr>
<tr>
<td>(a) Difficulties with the Department of Home Affairs, (b) difficulties in obtaining permits, (c) extended periods to obtain work permits</td>
<td></td>
</tr>
<tr>
<td>(a) No permits for family members, (b) family not in South Africa, (c) send family home because of lack of accommodation</td>
<td>Family separation</td>
</tr>
<tr>
<td>(a) Language difficulties, (b) adapting to new culture and values, (c) locals unwilling to speak English, (d) xenophobic attacks</td>
<td>Social adjustment</td>
</tr>
<tr>
<td>Career experiences</td>
<td>Remuneration differences</td>
</tr>
<tr>
<td>(a) Remuneration is relatively low, (b) salary disparity with the local academics, (c) not professionally remunerated</td>
<td></td>
</tr>
<tr>
<td>(a) Community work, (b) moderation language, (c) asking for other students to translate in class</td>
<td>Communication</td>
</tr>
<tr>
<td>(a) Being a woman and a foreigner, (b) no voice as a woman, (c) single woman not valued in the African context</td>
<td>Gender discrimination</td>
</tr>
<tr>
<td>(a) No funding for development opportunities, (b) rely on own money for development, (c) short-term contracts not being funded by the university, (d) discriminated by the locals, (e) segregate and alienate requests</td>
<td>Limited opportunities for development</td>
</tr>
<tr>
<td>(a) Staying far away from the workplace, (b) have to drive long distances to work daily, (c) university does not pledge to provide accommodation</td>
<td>Unavailability of accommodation</td>
</tr>
<tr>
<td>(a) Lot of pressure, (b) work overload, (c) lack of support for women</td>
<td>Lack of work-life balance</td>
</tr>
</tbody>
</table>

Table II. Development of themes – resultant themes from initial codes
<table>
<thead>
<tr>
<th>Life challenge</th>
<th>Meaning</th>
<th>Illustrating quotes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immigration difficulties</td>
<td>The participants had to encounter various problems from the Department of Home Affairs in trying to obtain the required documentation.</td>
<td>“We face a lot of difficulties in obtaining papers from the Department of Home Affairs for our families. We cannot always relocate with our families at the times we want them because of Home Affairs” (Sue, Female, Zimbabwe) “Also things like work permits, we have had a lot of difficulties. Even some of my colleagues have had challenges, getting their permits processed, study permits for their family members and stuff like that” (Conrad, Male, Ethiopia) “Definitely there are challenges by being a foreigner in someone’s country. It might be document related, we all know about home affairs how long it takes for one to get their permits and visas. Like right now I’m trying to get a permit for my daughter now and it’s almost 6 months now before it’s out, I don’t think the university intervenes in family business, they only assist their employees” (Paul, Male, Cameroon)</td>
</tr>
<tr>
<td>Family separation</td>
<td>Due to factors such as lack of accommodation and immigration difficulties, participants had to leave their families in their home country.</td>
<td>“The stressful situation is when you get a job and you don’t have a permit. It happened to me in 2009 when I was now a full-time lecturer. When I got the job I went to home affairs and the lady at the home affairs asked me “why are you taking this job, go and be a teacher in Zimbabwe. I’m not going to give you the permit, but I had all the requirements, but the lady said no I’m not going give you go to Pretoria”. We had to go to Pretoria with one of my colleagues, to go and apply for a permit which we could have taken in King Williams’ Town, but she said to us you foreigners are taking our jobs. Sometimes you get the job and you don’t get the permit” (Angie, Female, Zimbabwe) “Part of my family is not here so I do have challenges because I have to travel at least once or twice a year to my home country and I’m not able to partake in family matters that I would have loved to or family responsibilities that I would have loved to” (Robin, Female, Botswana) “Right now we are facing a challenge of the package and not getting the right accommodation and as a result I’m forced to send my family back home. My family is in Ethiopia right now. That was the only solution I had because I couldn’t get accommodation so I had to send them home” (Conrad, Male, Ethiopia)</td>
</tr>
<tr>
<td>Life challenge</td>
<td>Meaning</td>
<td>Illustrating quotes</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Social adjustment  | The challenge of trying to fit in with and building relationships with the locals | “Point number one is I am in a foreign land that on its own is a huge challenge because not only are you supposed to start learning their language, you learn the way they do things, and you learn their culture” (Kelly, Female, Zambia)  
“Given the fact you are not at home, you need to adapt to a lot of things, for example, you need to adapt to the culture, the food, the music so it always takes a while. Every now and then it always daunts on you that look this is not your country. There are certain things which might not be written down but there certain things which you cannot do being a foreigner in someone’s country. So there those latent clashes, cold wars between you and some of the locals, and this happens every now and then, especially in South Africa where foreigners are always perceived as suckers of financial and economic opportunities” (Paul, Male, Cameroon)  
“Interacting with people in this environment is a little bit difficult because of my accent and also the language, I have discovered that most people here want to speak Xhosa (local language) they don’t want to speak English that much” (Azo, Male, Nigeria)  
“I have seen xenophobia being exposed to me even by the administrators, I have been subjected to xenophobic treatment” (Angie, Female, Zimbabwe)  
“They see you doing that and living a better life, instead of imitating they will say you are taking our job but there is no job you are struggling to create a job. So the worst of it all, the xenophobic attacks that came from time to time and place to place, so all those things make you feel up tight to always say this is not my home which is not a good thing for you” (Lily, Female, Uganda)  
“You it’s difficult to answer because it’s not the institution but a few individuals within the institution. There are some individuals who are working here who are treating us as animals but I cannot say it’s an institutional but it’s individual. Probably the university should have given orientation to the workers” (Conrad, Male, Ethiopia) |
South African Department of Home Affairs trying to obtain the required documents to work, study and live in South Africa. Robin, a participant from Botswana, shared that:

“I have experienced some challenges here and there, some element of discrimination for being a non-citizen especially when I was processing my work permit. I had a lot of difficulty conversations with some community members even the home affairs officials. My children faced a lot of difficulties to get their study permits. The university did not do much about it. (Robin, Female, Botswana)

Despite the participants facing several challenges in obtaining documentation, the university did not assist them to obtain the documents for their family members. Such difficulties sometimes led to family separation. Failure to acquire the required documents in time meant that the participants had to relocate on their own, leaving their families behind. A lack of accommodation also caused family separation. Most participants struggled to obtain accommodation to live with their families. As a result, the families had to be sent back home.

Further, most participants faced difficulties in trying to adjust into a community that did not welcome them. This was shared by Lily, a female participant from Uganda, as follows:

“Yes. In 1988 when I was a teacher, I think we were some of the first expatriate teachers, so it was a lot of, we were a curiosity to the locals they had never seen black people who don’t speak the local language. But now, when more and more of us came, then the locals started seeing us a threat to their own employment opportunities, so there was resentment and so on. (Lily, Female, Uganda)

The participants were perceived as “financial and economic opportunity suckers” by the locals. The locals, thus, did not welcome the participants, which created tension between the two groups. Consequently, most of these participants lived in fear of xenophobic attacks. This was explained by Wayne as follows:

“You see because of the xenophobic attacks that happened, people we are always living in fear, you know when something happens there is a high possibility that it might happen again. So, no I don’t think the community will help, you just have to keep away from the community. (Wayne, Male, Kenya)

7.2 Career experiences resulting from self-initiated expatriation in South Africa

The narratives of the participants indicated career challenges which affected how they performed their duties. The narratives of the participants with regards to the career challenges are outlined in Table IV.

Most of the participants believed that there was salary inequality between themselves and the locals. Participants implied that some locals who were juniors were earning more than them as seniors. Such inequalities led to job dissatisfaction, but because of challenges in their home countries, they had to settle for what they could.

Another challenge was communication. The participants had difficulties in communicating with the locals due to the differences in language and unwillingness of locals to converse in English. This affected how the participants had to deliver their lecturers. Bill, a male from DRC, shared the following:

“As foreigner I’m facing challenges in some way because some of the students are not getting right the concept in English so sometimes you have to ask someone who is speaking the local language to translate the concept. (Bill, Male, Democratic Republic of Congo)

This was also a challenge when delivering lectures. Some local students found it difficult to understand various concepts in English. This made it difficult for the participants to fulfil their duties.
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<tr>
<th>Career challenge</th>
<th>Meaning</th>
<th>Illustrating quotes</th>
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| Remuneration differences | The participants perceived their remuneration as less than that of the locals and that it was unfair considering the amount of work they performed | "In the academics it’s not challenging as such but the remuneration is relatively poor if you compare it with working elsewhere. Academic doesn’t pay much. But I’m enjoying it, you do a lot of research and you understand some of these systems now" (Sue, Female, Zimbabwean)  
"The standard rates they are giving us right now are not the same as South Africans’, it’s just that salaries are confidential but you will be surprised that the salaries that they are giving us, the same person who is sitting in my position with same experience or sometimes I even have more experience than that person, but they are getting a higher salary than me" (Angie, Female, Zimbabwe)  
"Pay ratio, expatriates need to be professionally remunerated” (Mark, Male, Kenya) |
| Communication difficulties | Participants illustrated that due to their inability to speak the local language, they faced difficulties in performing their duties effectively | "Yes, I could not even greet in Xhosa, I had not interacted with Xhosa people before. I just googled and ask a few people about the culture and the tradition, but most of the, I found a lost experience, a lot of difficult in communication especially with the community, and even in my work, when I do my work (community work) I understand part of Xhosa but I’m still not fluent. So that also is constraint to my work, especially I do a lot of work with communities and language and culture are a challenge” (Robin, Female, Botswana)  
"One of them is the issue of language, this was one of my major challenges coming into Rwanda where the students you are training did their education in French and you asked to teach them at university in English. How do you manage that? You have to learn to be slow, accommodating students because you will be speaking in English, they have to get that little English translate into French for them to understand” (Peter, Male, Zimbabwe)  
The first thing that you need to do if they are going to embrace you is to learn their language because if you go to the offices and try to speak in English sometimes they pretend they do not even understand what you are saying but if you go there and you are speaking in Xhosa even though its broken Xhosa you are opening their ears then they can release that token to you” (Kelly, Female, Zambia) |

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<th>Career challenge</th>
<th>Meaning</th>
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<tr>
<td>Gender discrimination</td>
<td>Most females felt that they were not treated the same as their male counterparts</td>
<td>“The other challenge which I really think is there is that being a woman and a foreigner you feel as if your own voice takes a lot of time to be heard but if you take your idea to someone else who is from here and then make them to present that idea as if its theirs, you see the results that comes from there, they tend to be fast” (Angie, Female, Zimbabwe)</td>
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<td>“And being a woman academic and being away from home it’s like you are walking on eggs most of the times, it’s a situation of saying sometimes they say jump you have to say how high, because at the end of the day what you are simply saying is I just want to protect this job that I have so most of the things you have to put those blinkers, you don’t look aside, you just look ahead” (Emily, Female, Nigeria)</td>
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<td>“At the end of the day, remember with us with the African culture an unmarried woman is not valued out there within the society, if you stand up and say something, even if it does not hold water but if you are married sometimes you find that people will clap their hands but if you are not married people will say “haiwawo chii chaangatiidzai” (what can she tell us)” (Kelly, Female, Zambia)</td>
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<td>“There is also the issue of money, when you make applications, sometimes you feel as if they just read the surname and say okay fine this person is not part of us. You have to make follow ups and follow ups and follow ups until sometimes you end up giving up. I remember there was a time last year we attended a workshop at North West University, we had to use our own money and to be told that we will come back and claim for the money but it took so much energy for us to get that money because we were getting it in bits and pieces so at the end of the day some of the things that you do, you end up doing them because I just want to promote my career” (Kelly, Female, Zambia)</td>
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<td>Limited opportunities for professional development</td>
<td>Participants faced difficulties in their career development as the institution did not provide them with the required funds</td>
<td>“Because of the short-term contract I have, am unable to get funds from the institution to do my research to my full potential. That has been a great challenge for me” (Jim, Male, Eritrea)</td>
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<td>“Also there are challenges which are related to the administration processes, if I want to do something or to request something it is not done in time and there is also strife among staff members, a big strife not...” (continued)</td>
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<td>Career challenge</td>
<td>Meaning</td>
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| Unavailability of accommodation | Unavailability of accommodation close to the workplace meant participants had to spend time more on the road | actually with South Africans but among South Africans. So sometimes we feel, because I’m not from this region, discriminated by other people from this region. So we end up not getting the funds to do our work” (Conrad, Male, Ethiopia)  
“There is segregation and they alienate you and delay your process when you request for something it is delayed, they don’t inform us in time of many things but the others will be aware” (Jim, Male, Eritrea)  
“Well, from my personal experience, my biggest challenge has had been accommodation, I have had to stay very far away from my workplace as an expatriate, driving long distances consumed my time and also it did not give me a little bit of peace of mind, the time I travelled between my home and my workplace could have been better utilised” (Robin, Female, Botswana)  
“I’m staying in King Williams Town and it’s exhausting to drive on a daily basis and it’s also taking my time. I don’t have accommodation in Alice it’s one of the challenges but I will apply but I have heard that accommodation is an issue at Fort Hare” (Sue, Female, Zimbabwe)  
“There are some issues that would not necessarily affect everybody, but only expatriates, for instance you are an expatriate and the university does not pledge to provide accommodation for everybody, I personally have struggled to get accommodation because I don’t have connections, and I don’t have family that is here. That may be a general problem, but it is affecting us. I think being an expatriate makes it more difficult to get accommodation” (John, Male, Zimbabwe)  
“Academia is a profession that has a lot of pressure in the 3 areas, community engagement, lecturing and researching, so it is quite demanding and it is not easy to balance your work and private life. The work load is just too much” (Robin, Female, Botswana)  
“Without that support you find that most women end up being single or the end up separating or divorcing from their husbands because academia is taxing, it’s a greedy profession. So finding the balance it’s not possible maybe that is why long ago women were just not to work, they were meant to stay at home and raise the kids” (Kelly, Female, Zambia) |
Most female participants expressed that the university treated them unfairly due to their gender. Their views were not taken seriously. However, regardless of the mistreatment, the participants remained focused on their goals of career development. Kelly, a female participant from Zambia, expressed that:

Xhosas still have that control over women, you find that women’s views are not taken seriously unless you have been given that platform to say yes you can answer back. (Kelly, Female, Zambia)

Most of the participants indicated that opportunities for professional development were missed due to the delays that were involved in the administration process. Participants believed that they were unable to receive funding from the institution because of their status as expatriates. For their career development, they had to rely on their own funds.

Also, most of the participants struggled to secure accommodation. The institution did not provide adequate accommodation for all its staff members. The people who suffered the most were expatriates who had to relocate from their home countries to an area where they did not know anyone. As a result, many of the participants secured accommodation in areas that were far from the workplace and, thus, had to drive long distances daily.

The other challenge that emanated from the narratives was work-life balance. This was mostly among married females who had to work and look after the family at the same time. Mercy mentioned that:

My work-life balance was much better when I was single but being married and being a mother brought a lot of challenges to my work-life balance. It became difficult to balance because of many responsibilities I had. (Mercy, Female, Zimbabwe)

8. Discussion

The main purpose of this project was to gain an understanding of the lived experiences of SIAEs within a higher education context in South Africa. The narratives generated life and career experiences that were faced by the participants during their expatriation. Life experiences included immigration difficulties, family separation and social adjustment. Career experiences were comprised of remuneration differences, communication difficulties, gender discrimination, limited opportunities for professional development, unavailability of accommodation and a lack of work-life balance. The findings of this study indicate that some of the experiences of SIAEs are like the ones reported by AEs (Trembath and Herbert-Hansen, 2017), such as gender discrimination (Hildisch et al., 2015; Skachkova, 2007), social adjustment (Clark and Altman, 2016), communication (Pudelko and Tenzer, 2018; Suutari et al., 2018) and work-life balance (Shortland, 2018). However, several findings are specific of SIAEs in South Africa, as discussed below.

SIAEs reported a lack of institutional support that resulted in difficulties in obtaining work permits for oneself and for the family members. Furthermore, a lack of institutional support resulted in difficulties to secure accommodation. Similar to findings of previous studies (e.g. Fontinha et al., 2017; Lauring and Selmer, 2018), SIAEs do not benefit from support from the host institution unlike for those whose mobility was facilitated by the institution. Due to a lack of institutional support, participants stated that they had to be separated from their families because of no proper documentation and lack of accommodation. It is noted that all expatriates, i.e. AEs and SIEs, endure challenges of family separation (Shortland, 2018). However, SIEs, especially in Africa, are usually driven out of their home countries due to factors such as poor political and economic conditions as well as civil conflicts (Harry et al., 2017; Kurka, 2007). Therefore, not being able to be with their families can be more stressful than it is for AEs.

Furthermore, as suggested by Shaffer et al. (2006), participants were concerned with three basic human needs, namely, predictability, recognition and power. These basic needs were
not easily achievable because of job insecurity as well as discrimination from various individuals (community members and university staff) (Clark and Altman, 2016; Fontinha et al., 2017; Jonasson et al., 2018). Discrimination can be experienced by both sets of expatriates, i.e. AEs and SIEs. However, due to a lack of accommodation, SIEs have to reside within the local community unlike AEs who usually reside in protected areas. In South Africa, it is risky for SIEs to reside in the local community due to previous history of xenophobic attacks (Kang’ethe et al., 2016). These attacks were (are) caused by high unemployment rates among the locals which continues to prevail (Magagula, 2017). Foreigners, (employed or unemployed), are therefore more at risk especially when residing in the local community.

Previous studies suggest that expatriates earn more than local employees, even with the same qualifications (Harry and Dodd, 2016; Welch, 2003), and receive additional remuneration packages (Kroeck and Von Glinow, 2015). This is contrary to the findings of this study on SIAEs, which suggests that SIAEs are earning less than local academics, despite being more qualified and experienced. Previous studies (e.g. Kim et al., 2018; Shortland, 2018) argued that competitive remuneration is important for the retention of expatriates. However, findings of this current study indicate that although competitive remuneration is important, and despite the SIAEs earning less, they remained in their employment chiefly due to various factors in their home countries such as poor economic conditions. This may suggest that local HEIs are taking advantage of the brain drain from the neighbouring countries.

The study findings also suggest that the SIAEs had limited opportunities for professional development. This was caused by a lack of funding, discrimination and short-term contracts. This is in support of previous findings which indicated that SIAEs were being excluded and their contribution being devalued within the university context (Munene, 2014; Skachkova, 2007). Findings of this study also concur with previous findings that language differences are a challenge for both the expatriates and local employees (Abur, 2014; Andresen et al., 2017; Pudelko and Tenzer, 2018; Selmer et al., 2018). Unlike other previous studies (e.g. Jonasson et al., 2018; Volk et al., 2014) which argued that local employees were the ones who were mainly affected by the need to speak a second language, findings of this current study indicate that it is the SIAEs who had to learn the local language to accommodate their needs and local employees were not willing to accommodate the expatriates. The findings of this study further support those of Munene (2014) who pointed out that segregation was a challenge among expatriate academics.

As in previous studies (Abur, 2014; Bader et al., 2018), findings of this study show that discrimination was more pronounced among females. Due to the values and culture of the host nation, most females were not perceived as equal to their male counterparts despite performing similar duties and having the same qualifications. Furthermore, following previous studies (e.g. Shortland, 2018; Kim and Tung, 2013), findings of this study indicate that most female expatriates faced difficulties in managing a work-life balance. This was mostly due to the African culture which believes that females should focus more on looking after the family. This meant that the career development of females was delayed (Shortland, 2018). Both set of female employees, local and expatriates, face the same challenge, which is more pronounced among SIAEs due to the lack of a social support structure in the host country (Clark and Altman, 2016; Shortland, 2018). The findings of this study concur with Jonasson et al. (2018) that SIAEs and local employees are similar to a certain extent. However, the major difference between these two sets of employees is the novel situation that SIAEs have to face in a new country. SIAEs experience disruption of life, psychological ambiguity and undergo various practical adjustments in the host country which makes them different from local employees.

The findings indicate that the lived experiences of the SIAEs were mostly negative. However, due to poor economic conditions in their home countries, they had to be resilient.
Despite the challenges, the academic expatriates were more concerned about their career development and career success. This is contrary to the suggestion by Andresen et al. (2017) that a new environment resulted in increased turnover and failure rates. This is probably because participants of this study were from poor countries and had no option but to endure the difficulties. The participants tried to integrate their work and non-work dimensions in order to be successful in a new environment. The participants were mostly motivated by intrinsic and extrinsic rewards such as a salary and a passion for lecturing.

The participants felt socially excluded because of being foreigners in the country. This is in contrary to previous research which indicated that P-O fit resulted in perceived social inclusion (Van Vianen et al., 2013). There was no fit between the values of the organisation and the values of the SIAEs. Another important finding was that the intention to stay in employment was not a result of P-O fit but poor political and economic conditions in the participants’ home countries. The working environment was not conducive for the participants to perform their work. The participants had to be resilient amid adversities in order to succeed in their careers. This study was able to demonstrate that P-O fit occurs when one entity between a person and an organisation offers what the other needs. The person was benefitting through the salary while the institution benefitted from quality service delivery. Previous research (e.g. Deniz et al., 2015; Chen et al., 2016) highlighted that P-O fit resulted in high job satisfaction, less job stress and high organisational commitment. However, findings of this study indicated that most of the participants were unsatisfied with their working environment and were not highly committed. These findings may be explained by the fact that the participants were victims of discrimination and a lack of job security.

Academia is a stressful field which means that academics need to work together to avoid being stressed and isolation. The findings of this study further show that there was no compatibility between participants and their work groups (P-G fit). The participants mostly socially interacted with fellow expatriates because of perceived discrimination by the local employees.

The findings indicated that there was a correspondence between the job demands and the skills and knowledge of the participants. There was also congruence on the needs-supplies fit. The participants’ needs such as finance were being met their jobs. The ability to meet personal needs motivated the participants to continue working in adverse conditions. The study demonstrated that despite some incompatibility between personal characteristics and environmental conditions participants performed their duties to an optimal level because of perceived benefits from the employment.

9. Recommendations and conclusion
Although enlightening, the findings of this study have to be interpreted within its limitations. The study findings may not be applicable to other countries as the sample was comprised of SIAEs from African countries working in South Africa. The findings may also not apply to other SIEs who are working outside the academic field. The study was restricted to the experiences of SIAEs from developing countries and did not explore the experiences of SIAEs from developed countries. Lastly, though the data were analysed by two researchers to avoid bias, the findings have to be inferred cautiously as the researchers are also SIEs which might have influenced the interviews and interpretation of the data.

Based on the findings and limitations of this study, future research should, thus, look at the differences that exist between SIAEs and SIEs in other professions. Furthermore, to have a better understanding of the lives of the SIEs, future research should focus on comparing the experiences of SIEs and local employees, as they are regarded to be the same with the only difference being the new country for SIEs. Future research should also focus on comparing the differences that exist between AEs and SIEs in the African context due to the limited (or non-existent) literature in this regard. Furthermore, future research should focus on
comparing the lived experiences of academic expatriates from developed and developing countries as the mobility of these two groups might be driven by different motivations.

Given the high brain drain in African countries and the skills shortage in South Africa, the quest for talent remains a key issue in many sectors, including HE. Higher education institutions should, thus, understand the lived experiences of SIAEs in order to attract and retain their services. SIAEs, due to skills shortages, benefit the country’s economy by imparting their knowledge and training the young population of the country. Hence, the demand for academic expatriates in developing (or emerging) countries will continue to prevail. The narrated lived experiences provide useful information to SIEs who are considering the option of relocating into South Africa and higher education institutions who are looking at hiring expatriates.

The findings of this study have a number of important implications for future practice. It is suggested that HEIs should regard SIAEs as important human capital for the achievement of institutional objectives and maintenance of competitiveness. The institutions should offer direct and indirect support to SIAEs in areas such as mentoring, provision of safe accommodation and assistance in obtaining relevant travel documents for the SIEs and their family members. Furthermore, remuneration policies for both local employees and SIAEs should not be different to avoid consequences such as job dissatisfaction and disengagement. All employees should be remunerated as per their qualifications and experience. All employees should be given equal opportunities for professional development regardless of nationality or gender.

Another important practical implication is that SIAEs, because of related negative experiences of expatriation, have to create social support networks. There are also a number of important changes which need to be made in the way in which local people treat expatriates. Local citizens should offer more support, i.e. work and non-work-related support, to the expatriates for easy adjustment both in the work and non-work environment. Cross-cultural training for both sets of employees will help them to understand each other and be able to work together more effectively.

In conclusion, these findings enhance our understanding of SIAEs in the African context. The behaviour of SIAEs from developing countries is mainly determined by personal motivation rather the P-E fit. Personality characteristics such as psychological capital and cultural intelligence play a vital role in the career success and intention to stay in employment of the SIAEs. In order to survive and thrive in various facets of life human beings must adapt. To flourish at work a person needs three dimensions: social, psychological and emotional well-being. A person must be able to hone and utilise psychosocial resources to succeed in their careers.

Note
1. Throughout the research paper, the terms self-initiated academic expatriates and academic expatriates are used interchangeably.

References


Telling tales


Further reading


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Global mobility and the career of the stay-at-home partner

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Abstract
Purpose – Contemporary global mobility and dual careers are two key features of working life today. Little is known, however, about where they intersect, where one partner travels for their career, while the other partner is left behind, caring for the family and attempting to manage their own career. The purpose of this paper is to explore how the partner’s career is impacted by the traveller’s absence, and the strategies employed to enable their continued career development.

Design/methodology/approach – The paper employs a qualitative methodology, drawing on semi-structured interviews with the partners of international yachtsmen.

Findings – The findings highlight the prioritisation of the traveller’s career, for reasons of finance and their passion for their career. The implications of this could be detrimental to the partner’s career. Personalised, flexible working arrangements are essential in order for the partner to achieve a sustainable career of their own.

Research limitations/implications – The gendered nature of the sample provides an opportunity for further research examining the implications of the female being the traveller and the male the stay at home partner.

Practical implications – The paper examines a range of alternative strategies for maintaining or developing the career when also faced with additional family responsibilities.

Originality/value – This paper gives consideration to the career of the stay at home partner. A new dual-career strategy is identified – the entrepreneurial secondary career strategy, which has the potential to deliver the flexibility required to manage both work and family demands, and allow partners to enact their authentic career.

Keywords Family, Dual careers, Global mobility, Women’s careers

Paper type Research paper

1. Introduction
Global mobility has become an integral part of an increasing number of people’s lives, as they relocate internationally, seeking novelty (Caligiuri and Bonache, 2016), career progression (Suutari et al., 2018) or more frequently in today’s tighter labour market, employment (Baruch et al., 2016). In the global mobility literature, discussion on career development has typically focused on the expatriate (Rodriguez and Scurry, 2014). Again, typically, this expatriate has been male, and another body of literature has developed around the often female “trailing spouse” and the impact of the spouse’s ability to adjust to their new situation on expatriation success or failure (Cole and Nesbeth, 2014). Today, however, there are two factors which change this context. The first is dual careers, when each partner has a “future career orientation and psychological commitment to their work” (Harvey, 1995, p. 225). The second is the increased utilisation of the more contemporary modes of global mobility, including short-term assignments, commuter assignments and frequent international business travel (Bonache et al., 2010). While the function of the mobility in its contemporary forms, as in traditional expatriation, remains linked to organisational goals and individual career objectives, the key difference is that there is no trailing spouse – the partner usually remains in the home country, with added responsibilities for sole-parenting the family, and running the family home. Very little is known about the work domain of this partner who stays behind, and there is limited research that explains how the demands of living with contemporary global mobility affects their career.
The purpose of this paper is to address this gap, answering two specific research questions:

**RQ1.** How has the career of the stay-behind partner been impacted by the global mobility undertaken by the traveller in the relationship?

**RQ2.** What career strategies are employed to mitigate any impact?

Drawing on interviews with the partners of professional international sailors, we examine the ways in which the partners’ careers have been affected by the international mobility of the traveller, and we explore the strategies adopted to facilitate career development. While a gendered study was not intended, the nature of the international yachting community meant that it was the women who remained in the home country, while the male sailors enacted their careers internationally.

2. Literature review

2.1 Global mobility and dual careers

A career is defined as “the evolving sequence of a person’s work experiences over time” (Arthur et al., 1989, p. 8). It is continuous over a life-time and develops and changes, and it is not restricted to paid employment. In dual-career couples, both partners are committed to a working life (Harvey et al., 2009). Demographic changes over recent decades show an increase in the number of dual-career couples (Pixley, 2008), prompting a growing number of academics to question whether it is possible for both partners to sustain rewarding careers, and maintain a satisfactory work-life balance, whilst raising a family (Greenhaus and Powell, 2012). Seminal research at the turn of the century suggested that couples may consciously scale back work to reduce the family impact of dual careers. The strategies they adopt range from one partner leaving the workforce to various trade-offs, depending on the life-course factors present at any point in time (Becker and Moen, 1999). The scaling back was disproportionally borne by the female partner in 1999, and despite a general societal trend towards increasingly egalitarian attitudes, it appears the male career continues to be given precedence (Waismel-Manor and Levanon, 2017). This gendered career co-ordination is not limited to the domestic career but applies equally to dual-career expatriates. Hierarchical career decisions prioritising the male expatriates’ career predominate whereas female expatriates tend to take a more egalitarian approach when co-ordinating their career with their expatriate partner (Känsälä et al., 2015).

The disparity evident in the allocation of home and work responsibilities and the prioritisation of work suggests that the careers of women and men differ. Understanding of women’s careers is lagging the reality of women in the workforce. While women’s careers (in isolation) are not the focus of this paper, they are an integral part of the dual career, and a brief review is warranted. Until the twenty-first century, any discussion in the literature on the careers of women either highlights the differences between men’s and women’s careers, or uses the male career as the norm, and theorises from that point (see e.g. Levinson and Levinson, 1996). Few studies theorise from a female perspective. The exceptions are the model of Pringle and McCulloch-Dixon (2003) and the kaleidoscope career model (Mainiero and Sullivan, 2005), both which incorporate dynamic changes as an inherent factor of a woman’s career, and allow for a non-linear pattern of development (De Vos and Van der Heijden, 2017). Developing a further understanding of women’s careers is a largely unanswered call in the literature (Maher, 2013; Myers, 2011), and the addition of global mobility adds more complexity to the issue (Mutter and Thorn, 2018).

The impact of global mobility on dual-career couples has been examined primarily from the perspective of traditional expatriation. Statistics highlights the significant impact relocation has on the career of the trailing partner when prior employment rates of around 50 per cent drop to only 12 per cent once in the foreign locale (Brookfield, 2014).
Language issues (Roos, 2013), international regulations, complications around work permits (McNulty and Moeller, 2018) and a general lack of organisational support (Goede and Berg, 2018) all contribute to the career challenges of the traditional trailing partner. These dual-career issues are attributed with underscoring a traveller’s preference for short-term assignments (Tahvanainen et al., 2005), commuter partnerships (Sandow, 2014) and frequent international business travel (Kirk, 2015) over accompanied long-term expatriation. In other words, in deference to their partner’s careers, many travellers express a preference for engaging in contemporary forms of global mobility.

Whether the choice of contemporary global mobility over traditional expatriation actually benefits the partner’s career remains unknown, and there is an outstanding call to consider the dual-career impact of contemporary global mobility (Shaffer et al., 2012). The following section draws on the limited available literature to discuss the primary strategy identified for coping with the demands of separation, the adoption of flexible working arrangements.

2.2 The stay-behind partner at work

The existing literature suggests that partners of the globally mobile employ flexible working arrangements, and in particular part-time work, as they strive to maintain their career while managing the additional roles and responsibilities placed on them by recurring work-related separations (Parkes et al., 2005). The level of professional adaptation undertaken appears influenced by the age of any dependent children (Fischlmayr and Kollinger-Santer, 2013), just as it does for working mothers without a travelling partner.

In the modern labour market, increasing specialisation may limit the availability of local employment for dual-career partners (Sandow, 2014) giving rise to the “Commuter Marriage”, where one partner maintains a base away from home. The commuter relationship may be a conscious egalitarian approach to mobility, acknowledging the career commitment of each partner while wanting to avoid a trailing spouse situation with the attendant negative career impacts (van der Klis and Mulder, 2008). While commuting may be a conscious choice, the partner may still have to adopt flexible work practices in order to manage family commitments when the commuter is absent (Misan and Rudnik, 2015). This may reflect a resolve to prioritise the family domain (van der Klis and Mulder, 2008), or may be to make the most of any scheduled commuter time at home (Parkes et al., 2005).

Traditional gender ideologies prioritising the impact on the family over the maternal career is an issue that presents in domestic (Matias and Fontaine, 2015), traditional expatriate (e.g. Hearn et al., 2008) and contemporary global mobility dual-career literature (Dittman et al., 2016). The effect of the gender of the traveller is also relevant. Angrist and Johnson (2000) conclude the short-term deployment of women did not impact on their male partner’s employment, whilst the increase in responsibilities borne by female partners did result in them reducing the hours they worked. It appears that when both partners are travelling, as opposed to one global and one domestic career, the domestic responsibilities may be more evenly distributed (Fischlmayr and Kollinger-Santer, 2013). However, when one partner stays behind, a less egalitarian picture emerges.

Research into the penalty of motherhood indicates flexibility in employment is attained in exchange for reduced pay and promotional opportunities (Malatzky, 2013). Nevertheless, pursuing part-time employment, working less than 30 hours per week (OECD, 2016), is a strategy military partners adopt to meet the demands placed on them during deployments (Lara-Cinisomo et al., 2012). The partners of frequent international travellers also utilise part-time employment to manage the inter-role conflict they experience between their work and home domains (Känsälä et al., 2015).

There are three key reasons given by stay-at-home partners for seeking paid employment – career commitment, financial reward and the potential for social interaction (Parkes et al., 2005). Loneliness is a consequence of global mobility (Gustafsson, 2014)
so seeking company through employment is understandable. Some stay-at-home partners, however, make the decision to forgo paid work in the face of the additional domestic roles and responsibilities they must absorb during each of the traveller’s absences (Parkes et al., 2005). Those military partners who relinquish paid employment claim to experience fewer relationship issues, compared to those who persevere with some form of work outside the home (Lara-Cinisomo et al., 2012; Dittman et al., 2016).

2.3 Career co-ordination strategies among dual-career expatriate couples

Despite there being limited information about the careers of the stay-at-home parent in contemporary global mobility, there is one paper that considers dual careers in expatriation within the context of a family (Känsälä et al., 2015). Based on interviews with 39 expatriates on assignment who had a partner working at least before the assignment, three career co-ordination strategies utilised by the dual-career couples are identified. These strategies are called the hierarchical (the leading career is prioritised over the secondary career and the couple’s relationship), the egalitarian (both careers and the couple’s relationship are of equal importance) and loose co-ordination (careers invested equally and prioritised over family and private life considerations) (see Table I).

With this framework in mind, we aim to examine the careers of the partners who are living with contemporary global mobility to determine if this also appropriately identifies their career strategies. The methodology adopted to achieve this goal is detailed in the next section.

3. Methodology

Our aim was to extend theory in the areas of contemporary global mobility and careers, increasing our knowledge by filling gaps or oversights in the existing scholarship (Pratt, 2009). Our ontological perspective was interpretive, seeking to understand how people interpret and understand social events and settings (Eriksson and Kovalainen, 2016). As interpretive and constructionist researchers, we identify with social constructionists, believing that reality is constructed in an environment of shared understandings. Semi-structured interviews were, therefore, the method chosen as best suited to build the new knowledge, through the interaction between the participant and the researcher within the interview.

<table>
<thead>
<tr>
<th>Strategies</th>
<th>Hierarchical strategy</th>
<th>Egalitarian strategy</th>
<th>Loose co-ordination strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prioritisation</td>
<td>The leading career is prioritised over the secondary career and the couple’s relationship</td>
<td>Both careers and the couple’s relationship are of equal importance</td>
<td>Careers invested equally and prioritised over family and private life considerations</td>
</tr>
<tr>
<td>Impact of the career on the partner</td>
<td>Secondary career is affected by the demands of the leading career, opts out or scales down working</td>
<td>Both careers restrict the other to some degree</td>
<td>Careers are independent and do not markedly affect each other</td>
</tr>
<tr>
<td>Partner’s support for the career</td>
<td>Support is one sided</td>
<td>Support for each career is mutual</td>
<td>Tacit background support for each other’s career, adjustments must be made to private and family life</td>
</tr>
<tr>
<td>Family responsibility</td>
<td>Mainly on the partner with the secondary career</td>
<td>Both willing to compromise</td>
<td>Family considerations scaled down</td>
</tr>
<tr>
<td>Impact of gender</td>
<td>Male careers tend to be prioritised, and family responsibility tends to rely on the woman</td>
<td>Careers equally important and both share family responsibilities</td>
<td>Equally invested, but family responsibilities tend to fall on the woman</td>
</tr>
</tbody>
</table>

Source: Känsälä et al. (2015, p. 2194)

Table I. Theoretical framework of career co-ordination strategies
The participants of the study are the partners of international sailors who stay behind while the traveller temporarily relocates internationally for work. The international yachting fraternity was specifically chosen for this research as it encompasses the continuum of contemporary global mobility, including short-term assignments, commuter assignments and frequent international business travel. A snowballing approach was used to identify participants. This process was increasingly purposive, to capture a heterogeneous group, whose differing ages, geographic locations, family structures and career experiences had the potential to provide diverse perspectives. Table II shows the demographic details of the participants.

Interviews with 21 partners were undertaken to access the experiences of global mobility for those who stay behind, and the impact on their career. An interview guide was developed from the extant literature, and this formed the basis for the 45–90 min interviews. The majority of the interviews were face-to-face ($n = 19$), with the remaining two using Skype.

As with any qualitative research, it is important to substantiate the trustworthiness of the research through an assessment of credibility, transferability, dependability and confirmability (Lincoln and Guba, 1985). In this study, we focused on developing trustworthiness utilising four key strategies. First, the primary researcher’s position as a cultural insider meant that there had been a period of “prolonged engagement” (Lincoln and Guba, 1985, p. 304) with the research field. Second, a number of pilot studies were undertaken to ensure that the interview guide was not only appropriate, but consistently clear (Hollway and Jefferson, 1997), with the questions posed in lay language that were mutually understood (Brinkman and Kvale, 2015). These pilot studies tested our approach only, and were not included within the list of participants shown below. Third, the ontological view taken meant that the researcher participated in the research process alongside the participant to ensure that the knowledge produced reflected the participant’s views of their reality (Reinharz and Chase, 2002). Integral to this process was a reflective journal, documenting thoughts, observations and interactions with the participants. Fourth, both authors engaged with the data, discussing the salience and relevance of the material to the concepts of contemporary global mobility and careers. As experienced qualitative

<table>
<thead>
<tr>
<th>Partner</th>
<th>Age</th>
<th>Current domicile</th>
<th>No. of children</th>
<th>Current employment</th>
<th>Industry of employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anna</td>
<td>40–49</td>
<td>New Zealand</td>
<td>4</td>
<td>Contractor – part time</td>
<td>Healthcare</td>
</tr>
<tr>
<td>Belinda</td>
<td>30–39</td>
<td>America</td>
<td>2</td>
<td>Stay-at-home mother</td>
<td></td>
</tr>
<tr>
<td>Bree</td>
<td>30–39</td>
<td>New Zealand</td>
<td>2</td>
<td>Entrepreneur</td>
<td>Photography</td>
</tr>
<tr>
<td>Carol</td>
<td>40–49</td>
<td>Sweden</td>
<td>2</td>
<td>Student – full time</td>
<td></td>
</tr>
<tr>
<td>Claire</td>
<td>30–39</td>
<td>New Zealand</td>
<td>3</td>
<td>Stay-at-home mother</td>
<td></td>
</tr>
<tr>
<td>Dee</td>
<td>50–59</td>
<td>Canada</td>
<td>2</td>
<td>Permanent role – full time</td>
<td>Healthcare</td>
</tr>
<tr>
<td>Elizabeth</td>
<td>40–49</td>
<td>New Zealand</td>
<td>3</td>
<td>Family business</td>
<td>Sport management</td>
</tr>
<tr>
<td>Joss</td>
<td>50–60</td>
<td>New Zealand</td>
<td>3</td>
<td>Permanent role – part time</td>
<td>Retail</td>
</tr>
<tr>
<td>Jane</td>
<td>40–49</td>
<td>USA</td>
<td>2</td>
<td>Permanent role – full time</td>
<td>Education</td>
</tr>
<tr>
<td>Kate</td>
<td>50–59</td>
<td>New Zealand</td>
<td>3</td>
<td>Permanent role – part time</td>
<td>Retail</td>
</tr>
<tr>
<td>Kris</td>
<td>40–49</td>
<td>New Zealand</td>
<td>2</td>
<td>Permanent role – part time</td>
<td>Sport management</td>
</tr>
<tr>
<td>Kayla</td>
<td>30–39</td>
<td>New Zealand</td>
<td>1</td>
<td>Permanent role – part time</td>
<td>Healthcare</td>
</tr>
<tr>
<td>Kerry</td>
<td>30–39</td>
<td>New Zealand</td>
<td>2</td>
<td>Entrepreneur</td>
<td>Wholesale distribution</td>
</tr>
<tr>
<td>Michelle</td>
<td>40–49</td>
<td>New Zealand</td>
<td>3</td>
<td>Contractor – part time</td>
<td>Education</td>
</tr>
<tr>
<td>Mandy</td>
<td>40–49</td>
<td>Ireland</td>
<td>2</td>
<td>Family business</td>
<td>Property</td>
</tr>
<tr>
<td>Paulette</td>
<td>40–49</td>
<td>New Zealand</td>
<td>2</td>
<td>Permanent role – part time</td>
<td>Manufacturing</td>
</tr>
<tr>
<td>Sonia</td>
<td>20–29</td>
<td>New Zealand</td>
<td>3</td>
<td>Entrepreneur</td>
<td>Sport education</td>
</tr>
<tr>
<td>Stella</td>
<td>30–39</td>
<td>New Zealand</td>
<td>2</td>
<td>Entrepreneur</td>
<td>Retail</td>
</tr>
<tr>
<td>Stacey</td>
<td>40–49</td>
<td>Sweden</td>
<td>3</td>
<td>Entrepreneur</td>
<td>Event management</td>
</tr>
<tr>
<td>Sharon</td>
<td>30–39</td>
<td>New Zealand</td>
<td>3</td>
<td>Permanent role – full time</td>
<td>Manufacturing</td>
</tr>
<tr>
<td>Stephanie</td>
<td>20–29</td>
<td>New Zealand</td>
<td>2</td>
<td>Stay-at-home mother</td>
<td></td>
</tr>
</tbody>
</table>

Table II. Primary participants’ demographic data

As experienced qualitative...
researchers, this interaction facilitated a deep and shared understanding of the data while mitigating the potential risks associated with the insider status of the primary researcher.

The approach to the data analysis was abductive, drawing on existing theory to inform the thematic analysis and extend knowledge into the new context. The data analysis fundamentally adheres to Braun and Clarke’s (2006) prescribed six phases of thematic analysis, utilising NVivo to generate initial codes, followed by focused reading and re-reading, to further develop and refine codes. Themes were then identified, and reviewed before being presented here, with exemplar quotations from the participants.

4. Findings and discussion
The findings of the current study can be categorised into two broad areas – career prioritisation and career strategies.

4.1 Career prioritisation
The partners who stayed behind had increased domestic roles and responsibilities, and this impacted on their career options:

My career […][laughter][…] I think we both agree, that it would be difficult for our family for me to work full-time […] You know, I worked full-time when [the traveller] was working mostly at home, and Blake was really a baby, and we would leave home at quarter to seven, and we wouldn’t get home till half past five. So to have two kids and having the sole responsibility for pick-ups and drop off […] that wouldn’t work. (Stephanie)

Over three quarters of the partners indicated they had made sacrifices in their career to enable the traveller’s global mobility. Part of this sacrifice was the need for the parent who stays behind to compensate for the absence of the traveller:

When I fell pregnant we discussed work. And we decided that I was going to be a stay-at-home mum because [the traveller] travels. [We decided] it was important that one of us was a stable figure in our children’s lives. (Sonia)

I think that I perhaps, I would have perhaps gone back to doing something else other than just being a mother earlier. But that’s where you are over-compensating for him being away […] because in Sweden you would go back already at one, you know when your child is one you put them in day-care, that’s what most people do […] but for me I’ve felt it’s important that I’m there for them because [the traveller] is not so much. (Carol)

Furthermore, actively compensating for the missing traveller was not restricted to those with young children, as this was the reason provided by Michelle for her recent decision to resign from her full-time teaching role, even though her children are aged 10, 12 and 16:

Well it is because they’ve already got one parent away, [The traveller’s] away and he’s not around for them. By me going to work, I’m not there for them then either. I know I haven’t left the country, but I’m still over at the school, and they’re all back at home in the house. (Michelle)

The prioritisation of the travellers’ career, as opposed to the participants, was attributed to two factors – finance and passion. An example of a financially motivated career prioritisation was when Belinda was offered a full-time role managing an exclusive retail outlet at the same time the traveller was considering a new role that would include a significant amount of commuting from New Zealand to a European base:

They offered me a manager’s job. [But] there was no discussion about that, no, not at all. Making $16 an hour was never going to compete with what [the traveller] was being offered, which at the time was the most money he had ever been offered in his career. So, no, no, no, there was never a discussion about that. But that was really hard for me to turn down. (Belinda)
Over and above any financial consideration was the passion the sailors have for their career, which had an even bigger influence on whose career would take priority:

These guys are so lucky that their job is their passion in life, and my goodness, there are not many people who can say that. (Kayla)

It’s not just a job to him. So, yes, that’s why I don’t ever hesitate. It’s sailing, and it’s his passion. (Kate)

The existence of a career priority is implicit in corporate dual-career relocation decisions (Gupta et al., 2012; Känsälä et al., 2015) and our results suggest this is also the case with contemporary globally mobility. The prioritisation of the career of the traveller over and above the career of their partner was apparent, in varying degrees, across all of the participants. Staying behind to enhance one’s own career is a reflexive choice for partners. However, while they may improve their career opportunities, the traveller’s career often retains a primary position in their dual-career hierarchy, evident in the finding that many of the partners make significant career sacrifices to provide their children with a stable environment and to compensate for the absence of the traveller. Reducing one’s work responsibilities to care for children is not unique to the current context (Mutter and Thorn, 2017). This research demonstrates that the demands of contemporary global mobility amplify the need to make career adjustments. This may include going against the prevailing norm. For example, in Carol’s case, the societal expectation in Sweden was that the children should be in childcare, but because of the absence of the traveller, she felt she should stay at home. The age of children does impact on the level of responsibility the mother has, with increasing age expected to engender a more egalitarian approach to dual careers (Allen and Finkelstein, 2014). However, Michelle’s recent decision to resign from a full-time position, even though her children are older and partially independent, indicates contemporary mobility extends the timeframe where one partner must make career sacrifices to accommodate the other partner’s work demands.

The other contribution to the career prioritisation conversation is an enhanced understanding of whose career is prioritised in a dual-career partnership. The current findings indicate that the prioritisation of the sailors’ careers over their partners can be driven by disparities in their earning capacity. This reifies the importance of relative wage differentials in dual-career decisions. In her study of domestic career prioritisation decisions, Pixley (2008) identifies that the order of career prioritisation significantly predicts subsequent income. This suggests that the constant prioritisation of the traveller’s career based on earning disparity could be self-perpetuating, as the earning capacity of the partner continues to decline each time there is a recurrent decision to prioritise the traveller’s career. This also has implications for the broader expatriation literature, and although frequently stated (Caligiuri and Bonache, 2016), highlights again the need for organisational support for the partner.

However, the foremost reason provided by the partners as to why the sailor’s career was perpetually prioritised was passion. This may indicate a “calling” (Dobrow and Tosti-Kharas, 2011) but it is an area that requires further future research. One explanation for why the traveller’s calling could influence the stay-behind partners downgrading of their own career aspirations is Demerouti et al.’s (2005) finding that with domestic dual-career partners, when the life satisfaction of the male partner was strong, this positively influenced the life satisfaction of their wives. Perhaps the partners inherently understand that the traveller engaging in a career they feel passionate about has the potential to cross-over and impact their own life satisfaction. This assumes having a calling towards one’s career not only results in job satisfaction (Duffy et al., 2012), but may also influence life satisfaction. A full understanding of this relationship within the context of contemporary global mobility also requires further research.
4.2 Career approaches of the partners who stay behind

A continuum of employment. The career approaches adopted by the partners who stay behind spanned a continuum, from not working outside the home through to full-time employment. The few partners who were not currently in paid employment fall into two categories – those who were not engaged in any form of work outside the family home, and those who worked in an unpaid role. Belinda, who featured in the previous section as having prioritised the traveller’s career has currently completely opted out of the workforce, and while she professes a desire to return to paid employment, she does not believe that is currently feasible:

I don't know. When it comes to my career I'm really not sure what to do. I would really like to work, I really want a career [...] but as far as what that is, and when is the right time to embark on something, I really don’t know. (Belinda)

The participants who have unpaid roles were working in what could be described as their family business. In Mandy’s case, this was managing her extended family’s property portfolio:

I am kept busy when [the traveller] is away as my family have rental houses so I’m always doing up something, and seeing to them. (Mandy)

In Elizabeth’s case, her role is to provide administrative support for the traveller:

And there is a lot of admin involved in our lives [...] booking tickets and accommodation [...] I’m just busy. I keep an eye on the news [...] staying on top of when we transfer our foreign currency earnings across, what we instruct our accountant to do [...] I think I save a lot more by keeping an eye on that kind of stuff than I would earn. (Elizabeth)

One reason so few of the partners have opted out of the labour force, and that the majority of those who have done so are hopeful of shortly opting back, may be the social support that they receive from their work colleagues:

I have great nursing friends I work with, who I have worked with on and off for 10 years. I go in there and get intellectual stimuli, and friendship as well. I don’t go out with them socially as much as I used too though, I’m too busy probably with the children. (Anna)

At the other end of the employment continuum are the three partners who work full-time without utilising any flexible working arrangements. The age of their children has a clear influence on their career decisions:

With small children somebody had to be with them, and if he wasn’t going to be there then it had to be me [...] [however] I have recently taken the job as the [full-time] administrator at the girls’ [high] school. (Jane)

Flexible working arrangements. Approximately half of the participants utilise some combination of flexible working arrangements in their career approaches. Flexible starting and ending work times, schedule control or the flexibility to respond to non-work (i.e. family) situations (Haddock et al., 2006) are important for many partners. Sharon exploits each of these elements of schedule flexibility to maintain her full-time employment:

I am lucky, they let me bank hours when [the traveller] is at home, I work long hours and he does the school runs and the afterschool activities. Then when he’s away they’re really flexible, and I can work more around school hours. (Sharon)

An alternative approach taken by a number of the partners is ad hoc contract employment, which allows them the flexibility to work when they can, usually when the traveller is at home:

The hours are really flexible because I work on a casual basis. So every week I get the list of available [nursing] shifts, and if it fits in with the family, then I work. But when [the traveller’s] away I do less [...] my wages have decreased over the last two years because if he’s working then I’m not working. (Anna)
Almost a quarter of the partners currently hold part-time roles. For many, the number of hours they work is a reflection of both the age of their children, and the demands placed upon them by contemporary global mobility:

I mean I have always sort of worked part-time, but as they have gotten older, I am working more. But I still find, I don’t think I will ever work full time, because there is still so much to do in the home. I still do all the things that I have always done. (Joss)

A number of the part-time participants also incorporate aspects of remote working into their overall career strategy, with the support of their organisation:

They said to me when I took the job, do it from home, do it from here, do it from where ever you want, just do it [...]. I spend Christmas in [beach location], and every school holidays I spend there. And I just work from there and then the boys don’t miss out on going to the beach even when [the traveller] is doing the Hobart [yacht race commencing on the 26th of December] or whatever. (Kris)

The remaining five partners are currently self-employed working in their own entrepreneurial enterprise. Their businesses activities include photography, internet-based event planning and a horse riding school. While their endeavours span a broad spectrum, it appears their motivations are similar, as succinctly summarised by Sonia:

The perks of having your own business, you work when and where you want to, and for how long you want to work. (Sonia)

The ability to work from home allows the partners to manage their other domestic responsibilities, particularly when the traveller is away:

Today I got up at just after 5 so I could work first, because when [the traveller’s] away I have to get up around about 5 to do a few hours of work before getting ready for school starts. Because my work day finishes at 3. (Bree)

Conversely, when the traveller is at home they can also adjust their day accordingly:

When he’s home I try and get up at 7 and work till 5 or 6. So my work hours change. (Bree)

However, the current context can also amplify the challenges of entrepreneurial self-employment. For example, it may take longer to grow the business within the confines of contemporary global mobility:

When he was away, and the kids were still young, I didn’t do [photograph] weddings or anything because I had no one I felt I could leave the kids with because what if something happened. (Bree)

Furthermore, the demands of the business, when combined with the additional domestic demands and responsibilities borne by the partner who stays behind, may limit the partner’s personal time:

I make my own hours and do my own thing, but it’s just an extra thing and I feel like I’ve taken on too much. When I have the time to do it, I really enjoy it, I just don’t have the time. Because I can’t do it after the kids are home from school, I can sometimes do a bit of it between 6 and 7 in the morning. You know I used to enjoy doing the gardening, and there was just a lot more that I was doing for my own mental health, but I’m not doing that now. (Kerry)

The limited existing contemporary global mobility literature that does consider the impact on the career of the partner is primarily confined to generalised findings acknowledging that it may be more difficult for the spouse to work outside the home (Lara-Cinisomo et al., 2012; Misan and Rudnik, 2015). The current research provides the previously neglected detail, discussing the various adaptations the partners have undertaken during their career. Below, we consider the strategies the partners adopted, utilising the framework of Känsälä et al. (2015), and their hierarchical, egalitarian and loose co-ordination strategies.
4.3 Career co-ordination strategies and contemporary global mobility

Most of the sample fit the hierarchical strategy, where the traveller’s career is prioritised, and the stay-at-home partner’s career was secondary, and affected by the demands of the primary career. It is also noteworthy that the traveller’s career was also prioritised over the couple’s relationship—an inevitability given that the traveller’s work took him overseas and away from the family. With these demands on the stay-at-home partner, flexible working arrangements become a key component of the hierarchical strategy, and approximately half of the participants of the current study have fashioned various combinations of flexibility, including schedule flexibility, ad hoc contract work, and part-time work, to accommodate the additional domestic demands placed upon them by contemporary global mobility.

Schedule flexibility is a prominent strategy adopted by domestic dual-career couples when trying to balance work and family (Haddock et al., 2006). However, schedule flexibility on its own did not feature significantly among the participants. The reason for this may be that the more standard application of flexitime is restricted to starting and finishing times within a single day (Haddock et al., 2006), requiring a partner who is also afforded flexitime to take up the mantle of childcare at the opposite ends of the day. This is not possible, however, when the traveller is away. Permutations of schedule flexibility are, therefore, required. Sharon, for example, has an arrangement that allows her extensive flexibility depending on where the traveller is, working more hours when he is at home and fewer when he is away.

A number of participants use ad hoc contract employment to construct the level of flexibility they require, usually only working when the traveller is at home. While contract or temporary employment may marginalise workers (Hardy and Walker, 2003), it would appear these partners are more “lifestyle temps” who use ad hoc contract work to facilitate balance (Alach and Inkson, 2004). Utilising ad hoc employment to create an employment schedule around a traveller’s comings and goings is not a strategy that has been previously identified, but is one that appears to enable the partners to continue with their careers.

Part-time working is an adaptive strategy a number of the partners adopt which also falls under the hierarchical strategy. This approach is consistent with the limited global mobility literature where partners have restricted their work hours to meet the additional domestic demands (Lara-Cinisomo et al., 2012; van der Klis and Mulder, 2008; Känsälä et al., 2015). The combination of part-time and remote working seems to be a career strategy that is a response to contemporary global mobility. Working remotely allows for optimal time management (Hilbrecht et al., 2008) and the partners use the combination to manage the temporal demands placed upon them when blending their employment with the traveller’s mobility.

The partners, who are currently engaged in full-time roles that do not incorporate flexible working arrangements, have only done so as their children age. This again indicates the adoption of a hierarchical strategy. While opting out to take care of young children has previously been considered within the current context (Parkes et al., 2005), understanding that the changing demographic of the family means they may subsequently opt-back into full-time roles once the children have reached a certain level of maturity and independence, is new. The progressive reorientation of mothers towards work as their children age, and the penalties ascribed to maternal career breaks (Staff and Mortimer, 2012), have previously been identified by scholars focused on women’s careers. Understanding whether those living with contemporary global mobility take longer to return to full-time employment, and therefore pay a greater penalty, requires further comparative research. A final version of the hierarchical strategy witnessed in this research is opting out of the paid labour force in an attempt to manage the additional domestic demands and responsibilities. This mirrors the approach taken by many of the partners of commuters working in the extractive resource sector (Parkes et al., 2006; Dittman et al., 2016).

While numerous forms of the hierarchical strategy are apparent, there is no evidence of either the egalitarian or the loose co-ordination strategy in the sample. This is not surprising,
given that the egalitarian strategy suggests equal acceptance of both careers and family roles, while the loose co-ordination strategy prioritises careers over the relationship and family responsibilities. Clearly neither of these options is viable when one partner is travelling and the other is at home with the family. However, the study suggests that in the context of contemporary global mobility, where the partner stays at home, there is another strategy employed that has not been discussed previously and which is additional to Känsälä et al.’s (2015) career co-ordination strategies. In this new strategy, the partner’s career is still prioritised, but there is a change of career for the partner, often involving self-employment in a field that is more authentic for them (perhaps it is their calling). While the partner is still very much the person with the family responsibility, and the primary career is still prioritised over the relationship, there is the opportunity for the secondary career to become the primary career, should the traveller stop travelling. This has been termed the entrepreneurial secondary career strategy, and is shown in Table III.

Such a strategy offers multiple facets of flexibility including the restructuring of the partners’ work day depending on whether the traveller is at home or away, their use of the internet to facilitate remote working, and the prioritisation of their children at the expense of expanding their business. Although this strategy cannot occur without the support from the partner, particularly financial and emotional support, the support still weighs in favour of the primary career, who is overseas fulfilling their career objectives. Further, while this strategy facilitates flexibility, it may be at the expense of personal time (Lewis et al., 2015), an issue recognised by the partners.

5. Conclusions

This study is the first to consider the dual-career of the partner who stays behind. The contributions from this study to the contemporary global mobility, and the broader expatriation literature are four-fold. First, there is the discussion on the prioritisation of careers and the reasons behind that prioritisation. The possibility that a “calling” might have an impact on dual-career prioritisation requires further examination. Second, the impact of the traveller’s primary career on the stay-behind partner’s career is potentially greater than the impact of a non-travelling primary career and may go on for longer. Third, stay-at-home partners utilise a broad range of flexible options to manage their careers and to help mitigate the impacts created by the absence of the traveller. This includes ad hoc contract employment, which provides them with control over their schedule, not so much in terms of glide-time within an individual day, but in terms of working more hours when the traveller is at home, and reducing work commitments to balance the additional demands placed upon them when the traveller is away. Finally, a new career co-ordination strategy is identified – the entrepreneurial secondary career strategy.

The study also identifies a number of practical implications for the partner, the traveller and the employer. Partners should construct personalised flexible working arrangements.
that allow them to achieve a sustainable work-family balance that can accommodate the often-unpredictable comings and goings of the travellers. Flexibility, in terms of schedule and location, is fundamental to dual careers when living with global mobility. The enhancement of the internet and modern communication platforms means there is now an opportunity for remote working that they may not have previously considered. Entrepreneurial ventures are another strategy that may provide the potential to deliver the flexibility required to manage both work and family demands, and allow partners to enact their authentic career. This might also develop into the primary career, once the traveller stops travelling or the family responsibilities decrease.

For the traveller, there is a need to be aware of the impact of prioritising their career – both in terms of the sacrifices made by the partner and the very real risk that the continued prioritisation may restrict the partner’s future career opportunities. Känsälä et al. (2015) suggest that pursuing a hierarchical co-ordination strategy can lead to dissatisfaction in the longer term, if both partners’ interests are not considered equally. This highlights the need to move on from this strategy, to something more balanced. Further, in a context such as this research, the traveller needs to be aware of the finite timeframe for being a professional sportsperson, and the need to keep options open on a new primary career, or a preparedness to revert to the secondary career. We suggest the entrepreneurial second career strategy has the potential to become a “dual-career business”.

Although the travellers’ organisations have not featured in this research, they are not exempt from the implications of the findings. There have been continual, mainly unanswered, calls in the expatriation literature for the organisation to take some responsibility for the work-home balance of their employees (Cole and Nesbeth, 2014; Suutari et al., 2013). In the case of contemporary global mobility, it may be a case of “out of sight, out of mind”, as the family is not geographically located with the employee and is, therefore, invisible to the employer. The cross-over effects between home and work life have also been well researched however, including the impact on work performance (Lazarova and Thomas, 2012), and this may have particular salience in a situation where the demands on the family are increased by the absence of the traveller. This is an area for future research.

Other avenues for future research on dual careers and contemporary global mobility have been incorporated throughout the discussion. We also suggest longitudinal research, revisiting the partners to assess whether there has been any change in the prioritisation of careers and the strategies adopted to manage these dual careers over the longer term. A comparison with mumtrepreneurs (Lewis et al., 2015) and the entrepreneurial activities of older women (Tomlinson and Colgan, 2014) could provide a useful background. It would also be interesting to incorporate the traveller’s perspective, incorporating the decision-making processes for dual-career globally mobile families.

References


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The diplomatic spouse
Relationships between adjustment, social support and satisfaction with life
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Abstract

Purpose – The purpose of this paper is to investigate the relationship between adjustment, social support and satisfaction with life for expatriate spouses. The sample consists of European diplomatic spouses, residing all over the world.

Design/methodology/approach – This is a quantitative study. The sample consists of European diplomatic spouses, residing all over the world. The sample consists of 268 participants: 231 females and 44 males.

Findings – The findings of this study reveal that there was a significant relationship between adjustment and emotional and instrumental support as well as satisfaction with life. Furthermore, a multiple regression was performed to predict the level of satisfaction with life. Both adjustment and emotional support were statistically significant and they explained nearly 50 percent of the variability in participants’ satisfaction with life.

Research limitations/implications – The limitations of the paper include, for example, method bias, language and geographic location.

Practical implications – Foreign Ministries within the European Union (EU) will be in a better position to improve their expatriate programs and policies. Furthermore, this study indicated that the well-being of diplomatic spouses can be enhanced by considering how social support is provided, the level of adjustment and satisfaction with life.

Social implications – This study highlights the importance for diplomatic spouses to belonging to various groups, and group membership serves as a means to gain access to social networks. Therefore, being part of support groups of other expatriate spouses can aid cross-cultural adjustment.

Originality/value – Little is known about diplomatic spouses. This paper will be an important first step in examining the relationship between adjustment, social support and satisfaction with life for the spouses of diplomats working for the Foreign Ministries within the EU and European Economic Area.

Keywords Human resources, Spouse, Expatriate, International management

Paper type Research paper

1. Introduction

A workforce of expatriates is frequently cited as a competitive necessity in today’s global environment. Thus, expatriate assignments have become a familiar trend in multi-national and global firms (Crown, 2018). Expatriates have been defined as employees who work and live temporarily in a host location and can be relocated on the company’s behalf or be self-initiated expatriates who applied for a particular position abroad or work in the host country (McNulty, 2015). While some expatriates only take up one assignment in their career, there are others, such as diplomats, whose career revolves around working in the global arena. These expatriates accept one assignment after the other and stay no longer than three to five years in each country (Brandt and Buck, 2005). It could be argued therefore that diplomats fall under the termination introduced by Gonzalez-Loureiro et al. (2015) as being propatriates. Propatriates are defined as professional expatriates as their carriers evolve around relocation every few years. In addition to mandatory a relocation routine, diplomats face additional relocation challenges, for example, as demonstrated in the Russian spy poisoning scandal in which the diplomat’s European Union (EU) and the European Economic Area (EEA) nations collectively expelled more than 100 diplomats, with Russia subsequently doing the same (The Economist, 2018).

Although the diplomatic profession is among the oldest in the expatriation field, there is scant research to draw from (Fliege et al., 2016; Groeneveld, 2008; Davoine et al., 2013). That said,
Foster (2000) has raised concerns and questioned the psychological ability of continuous relocation from one county to another with regular intervals, time away from family and friends, and never laying down roots. Furthermore, researchers such as Caligiuri et al. (1998), Haslberger and Brewster (2008) and Shaffer and Harrison (2001) have argued that social and emotional costs occur, especially for families, when employment, support systems and local networks are repeatedly disrupted as a result of international relocation. A study by Fliege et al. (2016) on German diplomats indicated that compared to the general population, diplomats report worse health-related quality of life. That is, diplomats appear to be more vulnerable to the downsides of international mobility. These results demonstrated that perceived job demands and perceived general stress also had main effects on diplomats’ health-related quality of life. Of note, most diplomats relocate with their spouses and families (Groeneveld, 2008). Within the expatriate spouse research, results have indicated that the spouse and family adjustment is a critical factor in the overall international assignment success (Andreason, 2008; Cole, 2011; McNulty, 2015). As a result, several studies have emerged in recent years addressing issues such as social support (Copeland and Norell, 2002), dual careers (Groeneveld, 2008), parental demands (Takeuchi et al., 2002) and identity re-construction (Shaffer and Harrison, 2001).

The diplomatic profession was once considered to have high social status with privileges beyond those experienced by traditional expatriates (Galtung and Holmboe Ruge, 1965; Groeneveld, 2008). Loyalty to the profession was considered to be unquestionable, and spouses, who were most often females, regarded their position as important and one that could influence their husband’s career. There are signs that this perception has changed, however, with a younger generation entering the Foreign Service (Groeneveld, 2008). With apparent changes in society and the rise of dual-career couples, Davoine et al. (2013) conducted a dramaturgical analysis of diplomatic and consular spouses’ roles during assignments. The results identified roles such as partner representation, psychological or professional support, collection and transmission of information, representation of the home country at events, developing links with and within the home country’s local expatriate community, administrative support, supervision of local staff and, finally, service house supervision. For these reasons, the Foreign Service can be expected to face the same challenges as other global companies concerning recruiting and retaining talented employees. These results also indicate that many spouses are highly involved in the diplomatic career of their spouse while not being an employee as such of the Foreign Service. This is perhaps not surprising, as spouses of diplomats face a number of legal and institutional barriers when looking for work. For instance, spouses might be faced with losing their diplomatic immunity by gaining work, and some cannot obtain local work authorization in the host location (EUFASA, 2014). While there is a wealth of research on “traditional” expatriates and spouses, a gap in the research remains regarding individuals who experience living abroad as “standard” and not just as a temporary assignment. This paper, building on prior research on diplomats and their spouses, examines the relationship between adjustment, social support and satisfaction with life for spouses of diplomats working for the Foreign Ministries within the EU and EEA.

2. Theoretical background and hypotheses
2.1 Cross-cultural adjustment and social support
Research has indicated that spousal adjustment is an important factor in the overall success of an international assignment (Copeland and Norell, 2002; Takeuchi et al., 2002; Pruetipibultham, 2012). Recent surveys have indicated that the two main reasons for failed assignments are spouse dissatisfaction and the spouse’s inability to adapt (Lazarova et al., 2010). Furthermore, Ong and Ward (2005) have argued that for spousal adjustment to occur, several requirements must be met. For instance, the opportunity for spouses to foster a sense of identity and self-worth through the continuation of their careers, as well as support in the form of social networks, either maintained from previous locations or created anew for the duration of the overseas assignment (Ong and Ward, 2005).
Gupta et al. (2012) have, however, argued that organizations should invest increased effort in understanding spouse adjustment and the consequences of poor spousal adjustment. While some studies have found that a spouse may have to manage a greater amount of stress to adjust to the foreign culture (Konopaske et al., 2005; Andreason, 2008), a more holistic understanding of which factors lead to adjustment is still lacking (Gonzalez-Loureiro et al., 2015).

Previous research has also demonstrated that for most people, the first six months are key in establishing patterns for adjustment (Draine and Hall, 2000). The specific period in this regard varies and depends on several factors, including the host nation’s language, previous international experience, training in cross-cultural adaptation, the family’s ability to adjust and the culture’s novelty (Black et al., 1991). It has been argued that not everyone progresses through the process sequentially (Torbjörn, 1982; Ward et al., 1998), and there is on-going debate as to whether the process operates continuously or stops at a certain point (Ward et al., 1998). Despite there being numerous models and theories, limited consensus remains as to what constitutes individual adjustment. The concept has been described, interpreted and measured in varying ways and from numerous perspectives. For example, adjustment has been examined in terms of health-related variables (Babiker et al., 1980), perceptual variables such as perceptual maturity (Yoshikawa, 1988), relational variables such as feelings of acceptance (Brislin, 1981), the quality of relationships with host nationals (Deshpande and Viswesvaran, 1992) and more recently, regarding single parents (McNulty, 2015).

Psychological adjustment has been defined as the individual experience within a new society or the degree of psychological comfort and familiarity perceived within a new environment (Black, 1988; Black and Mendenhall, 1990, 1991; Feldman and Tompson, 1993; Sappinen, 1993; Schneider and Asakawa, 1995; Selmer, 2002). Sociocultural adaptation, on the other hand, is situated within the behavioral domain and refers to the ability to “fit in” or execute effective interactions in new cultural surroundings. Psychological and sociocultural adjustments are argued to be conceptually related but empirically distinct as these concepts are derived from different theoretical functions (Bhaskar-Shrinivas et al., 2005). The present study explores sociocultural adjustment, hereafter referred to as adjustment, and the spouse’s ability to fit in to the new cultural setting, as measured by the degree of difficulty experienced in managing everyday situations. In this vein, Black and Stephens (1989, 1991) developed a questionnaire for measuring adjustment for expatriates and spouses. Although sociocultural adjustment has been criticized, it is still the most frequently cited scale when measuring adjustment for this specific group (Chen et al., 2011; Haslberger et al., 2014; Davis et al., 2015; Guðmundsdóttir, 2015; Lin et al., 2012; Peltokorpi and Froese, 2012; Salamin and Davoine, 2015; Vijayakumar and Cunningham, 2016; Zhou and Qin, 2014).

It has been argued that it is more difficult for spouses to adjust than for expatriates, as the latter group is thought to have more frequent interactions with the local culture (Bauer and Taylor, 2001). Furthermore, authors such as Brown (2008) have argued that intercultural communication skills can reduce personal stress for both expatriate and spouse. The dominant stressors that have been identified are isolation from family and friends and the loss of contacts when moving to a new location. Sociocultural adjustment is theoretically based on cultural learning theory and is believed to highlight social behavior and practical social skills underlying attitudinal factors (Black and Mendenhall, 1991; Klineberg and Hull, 1979). Many researchers have highlighted several key factors influencing adjustment. For instance, McNulty (2012) found that both professional and social support to spouses was lacking and as a result suggested spouses would be provided with realistic overview of what to expect both prior and during the assignment. This could be facilitated though coaching, counseling or by reading material and thus facilitating increased adjustment.

On a similar note, Chen and Shaffer (2018) proposed that cross-cultural training can ease adjustment by providing spouses with cultural behavioral norms that facilitate adjustment.
They also found that problem- and emotion-focused coping strategies influenced spouse adjustment. They further argue that the spouses should be included in the selection process, and the findings of Van Erp et al. (2011) highlight the importance of rethinking the assignments overseas as family relocation not only expatriate relocation. Researchers such as Caligiuri et al., 1998 as well as Van Erp et al. (2014) argued that spouse adjustment can positively affect expatriate’s adjustment and performance, but spouse adjustment can, on the other hand, significantly influence expatriate premature return and psychological withdrawal (Foster, 1997; Takeuchi et al., 2002). McNulty (2015) and Teague (2015) have further argued that this may further lead to marriage dissatisfaction and divorce.

As mentioned previously, diplomatic spouses face a myriad of issues when moving to a new location. Living outside their country of origin and moving to a new location every few years, spouses experience significant disruption to their social support networks, career, income, role and self-esteem. Regarding the first disruption, Shumaker and Brownell (1984, p. 13) defined social support as “an exchange of resources between at least two individuals perceived by the provider or the recipient to be intended to enhance the well-being of the recipient.” Developing spouses’ social supports can be achieved through the presence of several factors, such as the expatriate, the assigning Ministry for Foreign Affairs/assigning company’s human resource department, and locals in the host culture. In addition, stress reduction and positive health outcomes, including both physical and psychological well-being, have also been identified as outcomes of appropriate social support (Andrews et al., 1978; Argyle, 1992; Dean and Ensel, 1982). Drawing on Ong and Ward’s (2005) research examining social support, there are two social support domains: socio-emotional and instrumental support. Socio-emotional support represents assertions or displays of love, care, concern and sympathy. Furthermore, this domain represents belongingness to a social group that provides company through a variety of activities. Ramos et al. (2017) suggested that organizations could increase well-being of spouses by getting them actively involved in the expatriation process, participate in the decision and more importantly receive all the relevant information in relation to the relocation first hand. Copeland and Norell (2002) also suggested organizations would benefit from providing relocation assistance that is tailored to the respective family life and needs (e.g. house finding, school for children, activities, shopping, etc.). However, while these services are used by organizations, the Foreign Service has generally not exploited their services as they have been reluctant to provide information on diplomatic relocations and these kinds of services are quite costly as well.

Instrumental support concerns concrete aid in the form of financial help, required services or material resources. The latter domain further relates to the communication of opinions or facts relevant to a person’s current difficulties and can be represented in actions such as advice or feedback. A study by Ong and Ward (2005) revealed that emotional support was more frequently provided by people overseas, i.e. not only by family and friends at home but also from people from third countries who could be considered fellow expatriate spouses. Notably, the authors found that instrumental support was ultimately more critical to expatriates’ psychological adaptation. Researchers such as Herleman et al. (2008) and Kupka and Cathro (2007) have argued that during a global assignment, a critical affecting factor of adjustment for expatriate spouses is social support. While many publications offer theoretical debates and models for considering and examining the influence of social support on expatriates and spouses (e.g. Adelman, 1988; Caligiuri and Lazarrova, 2002; Fontaine, 1996), the present study focuses on specific groups of diplomatic spouses who relocate more often due to their spouse’s profession.

Given the above-mentioned arguments concerning cross-cultural adjustment and social support, the following hypothesis is posited for diplomatic spouses:

**H1.** There is a positive relationship between adjustment and (a) emotional support and (b) instrumental support.
2.2 Satisfaction with life

Satisfaction with life is an extensively investigated topic in understanding the psychological happiness of different populations and has been defined as a "global assessment of a person's quality of life according to the individual chosen criteria" (Shin and Johnson, 1978; Vohra and Adair, 2000). Researchers have emphasized that happiness is composed of three related components: positive affect, an absence of negative affect and satisfaction with life as a whole (Argyle et al., 1989). It is not only what people have, but it is also how they judge their achievements, that determines satisfaction with life (Kavaler, 1998). Previous research has examined satisfaction with life of specific sub-groups such as women, children and the elderly, as well as their relationships with various conduits of mental and physical health (Alston and Dudley, 1973, Alston et al., 1974; Palmore and Luikart, 1972; Horley, 1984; Inglehart, 1990; Kavaler, 1998; Bruno and Stutzer, 2002). There have been a number of factors found to influence individual perception of satisfaction with life. Evans and Kelly (2004) found a positive relationship between family structure and satisfaction with life. Diener et al. (2003) found a positive relationship between cultural background and satisfaction with life. As mentioned above, relationships are found to be important aspects of life for expatriate and spouses' lives. Social capital theory (Hauberer, 2011) has indicated that relationships is a form of social capital that plays an important role in individual's well-being (Cole et al., 2009; Requena, 2003). While the expatriate is often offered increased financial means as well as social networks, the spouse on the other hand seldom have a job upon arrival in the new country and they lack the immediate network. In the study by Shaffer and Harrison (2001), spouses reported feeling unequal to the expatriate experiencing social isolation and greater financial, social and emotional dependency on the expatriate. Furthermore, from the power-dependence perspective (Emerson, 1962), higher level of dependency and vulnerability can lead to a stronger reaction to interpersonal interactions such as conflict (Rusbult and Van Lange, 2003).

Only a few studies have investigated the relationship between expatriate, family, spouse satisfaction and intention to terminate the foreign assignment, and which reported a negative relationship between the two variables (Shaffer and Harrison, 1998; Takeuchi et al., 2002), and even fewer studies have investigated the relationship between adjustment and satisfaction with life. In their study, Herleman et al. (2008) examined the relationship between stress and satisfaction, adjustment and support among expatriate spouses. The study participants were mostly Americans residing in Belgium. The results indicated that social support was positively correlated with personal and interaction adjustment, while social support was negatively correlated with depression. Social support was found to have no significant relationship with perceived stress, general adjustment and satisfaction. However, overall, a lack of social support and close social relationships are documented to have far-reaching implications. In contrast, greater amounts of autonomous behaviors and lower levels of stress have been associated with social connectedness and support (Uchino et al., 1996).

Furthermore, using a longitudinal data set, Lu (1999) analyzed an integrative model of happiness that incorporated personal factors such as demographics, extraversion, neuroticism and locus of control, and environmental factors such as life events and social support. The results indicated that social support predicted overall happiness. Moreover, Gallagher and Vella-Brodrick (2008) examined the nature of the relationship between social support and well-being by analyzing the predictive value of social support on subjective well-being. Their findings indicated that social support had predictive value in explaining negative affect and satisfaction with life. In a similar vein, Lu's (1999) longitudinal analysis of the relationship between environmental factors, i.e. life events and social support and personal factors in happiness revealed social support to be a stronger predictor of subjective well-being. Specifically, from all variables, only social support was significantly related to overall happiness.

In recent decades, the fact that a lack of social support and close social relationships can have far-reaching effects has been well documented. For instance, Baumeister and Leary (1995)
reviewed the evidence and demonstrated that people seem to have a fundamental need for close social relationships. Moreover, social connectedness and support have been associated with higher levels of autonomic activity and lower base levels of stress hormones (Uchino et al., 1996). While we are unaware of any study that examines the relationship between adjustment and satisfaction with life for spouses and given the aforementioned arguments and based on social capital theory, the following hypotheses are proposed for diplomatic spouses:

H2. There is a positive relationship between adjustment and satisfaction with life.

H3. There is a positive relationship between (a) emotional support and (b) instrumental support and satisfaction with life.

Based on the literature review, the hypothesized model is illustrated in Figure 1.

3. Method
3.1 Participants
This is a quantitative study in which the intention is to examine the relationship between sociocultural adjustment, social support and satisfaction with life. To this end, the European Union Foreign Affairs Spouse, Partners, and Family Association (EUFASA) was contacted. The EUFASA has 24 member states: Austria, Belgium, Cyprus, Czech Republic, Estonia, the EU, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxemburg, the Netherlands, Poland, Portugal, Spain, Sweden, Switzerland and the UK. Each national association was contacted and offered the possibility to participate. Many agreed, and the initial questionnaire was sent these member states in July 2015. Most (84 percent) of the participants were female, while only 16 percent were male. Moreover, 23.7 percent of the respondents were 40 years or younger, 32.2 percent were aged between 41 and 50 years, and 44.1 percent were 51 or older. The participants came from a total of 33 countries, but the majority came from the Netherlands (17.4 percent), Austria (11.5 percent), Switzerland (11.5 percent), Belgium (8.5 percent) and Italy (7.4 percent). In total, the participants from these five countries represented more than 56 percent of the total sample. Over 60 percent of participants had children accompanying them on their assignment. Also, 74.9 percent of

![Figure 1. The hypothesized model](image-url)
respondents were employed before they were transferred on a post, whereas only 38.8 percent were currently employed. Almost all participants (95.2 percent) were married. Notably, only 6 percent had received cross-cultural training before they commenced their assignment.

3.2 Instruments
Spousal adjustment was measured using a scale developed by Black and Stephens (1989). This scale has been widely used in conjunction with expatriate spouse populations. The questionnaire contains nine questions divided into two factors: interaction adjustment (three items) and general adjustment (six items). Items are measured on a seven-point Likert scale ranging from 1 (completely unadjusted) to 7 (completely adjusted). The present study also measured the level of social support using the Index of Sojourner Social Support developed by Ong and Ward (2005). Items are measured using a five-point scale ranging from 1 (no one would do this) to 5 (many would do this). The scale contains 18 questions divided into two factors: emotional support (nine items) and instrumental support (nine items). Satisfaction with life was measured using a scale developed by Diener et al. (1985), which consists of five brief statements. Participants were asked to indicate their level of agreement or disagreement with each statement on a seven-point Likert scale, ranging from 1 (strongly disagree) to 7 (strongly agree). Diener’s Satisfaction with Life Scale was used to assess the participants’ general satisfaction with life in the host country (Diener et al., 1985; Pavot et al., 1991). The original scale was modified slightly, with the words “in your host country” added to each question to prompt participants to answer the question specifically about their life in the current expatriate assignment.

3.3 Procedure
The questionnaire’s 31 items were subjected to a principal component analysis (PCA) conducted using SPSS. Prior to performing the PCA, the data’s suitability for factor analysis was assessed. Inspection of the correlation matrix revealed the presence of many coefficient values of 0.3 and higher. The Kaiser–Meyer–Olkin value was 0.94, which exceeded the recommended value of 0.6 (Kaiser, 1970, 1974) and Bartlett’s (1954) test of sphericity reached statistical significance, supporting the factorability of the correlation matrix. PCA revealed the presence of five components with eigenvalues exceeding 1, explaining 43.2, 13.7, 6.7, 5.7 and 3.5 percent of the variance, respectively. Note that an inspection of the scree plot revealed a clear break after the fourth component. Using Catell’s (1966) scree test, the decision was made to retain four components for further investigation. The four-component solution explained 69.3 percent of the variance, with component one accounting for 43.2 percent, component two 13.7 percent, component three 6.7 percent and component four explaining 5.7 percent. The interpretation of the four components was in line with the questionnaires used and could thus be used to develop the hypothesized model. All factors demonstrated several strong loadings, and all variables loaded substantially on only one component. Descriptive statistics for each factor, the Cronbach’s αs and correlation coefficients between factors are listed in Table I.

<table>
<thead>
<tr>
<th>Instrumental support</th>
<th>Functional support</th>
<th>Emotion adjustment</th>
<th>Emotional support</th>
<th>Social support and satisfaction with life</th>
</tr>
</thead>
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<td>253</td>
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<td>0.97</td>
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<tr>
<td>255</td>
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<td>1.65</td>
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<tr>
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<tr>
<td>269</td>
<td>4.97</td>
<td>1.29</td>
<td>0.87</td>
<td>0.39</td>
</tr>
</tbody>
</table>

Table I. Descriptive statistics, Cronbach’s α and correlation coefficient
Hierarchical multiple regression was used to control for age and gender. Those variables were entered at Step 1, explaining only 0.5 percent of the variance in satisfaction with life. After entry of the three control measures, instrumental support, emotional support and adjustment, at Step 2, the total variance explained by the model as a whole was 35 percent, \( F(5, 262) = 28.40, p < 0.001 \). The control measures explained an additional 34.7 percent of the variance in satisfaction with life, after controlling for age and gender. \( R^2 \) change = 0.247, \( F \)-change (3, 262) = 46.70 and \( p < 0.001 \). In the final model, only adjustment and emotional support were statistically significant, with adjustment recording a higher \( \beta \) value (\( \beta = 0.39, p < 0.001 \)) than emotional support (\( \beta = 0.28, p < 0.001 \)). Based on these findings, we concluded that age and gender do not have an effect in explaining the variance of satisfaction with life.

Traditional psychometric evaluations such as Cronbach’s \( \alpha \) revealed sufficient internal consistency for the hypothesized model. Note that it was important to conduct a confirmatory factor analysis (CFA) – AMOS software and the Mplus software were used here – and the measurement model was developed using CFA.

Several goodness-of-fit indices have been designed to assess the fit between data and structure (Hu et al., 1995; Shevlin et al., 2000). In the present study, the following goodness-of-fit indices were used. First, a \( \chi^2/df \) with a threshold set at values lower than 5. Second, the comparative fit index (CFI), which is an incremental fit index that measures relative improvement in the specified model’s fit compared to the independence model. The threshold was set at values higher than 0.95 (Bentler, 1990). Moreover, the root mean square error of approximation (RMSEA) was used, which is one of the most informative criteria. This measure considers the error of approximation in the population and is sensitive to the number of estimated parameters. The threshold value was set at values lower than 0.05 (Steiger and Lind, 1980). Finally, standardized root mean residual (SRMR) was used, which is the square root of the discrepancy between the sample covariance matrix and the model covariance matrix. The threshold was set at values lower than 0.05 (Hu and Bentler, 1999).

4. Results
The first hypothesis proposed for diplomatic spouses is as follows:

\[ H1. \] There is a positive relationship between adjustment and (a) emotional support and (b) instrumental support.

The relationship was investigated using Pearson product–moment correlation coefficients. Preliminary analyses were performed to ensure that there were no violations of the assumptions of normality, linearity and homoscedasticity. According to Cohen’s (1988) classification of strength of association, there was a medium positive relationship between adjustment and emotional support (\( r = 0.314, n = 246, p < 0.0005 \)). The relationship between adjustment and instrumental support was also medium and positive (\( r = 0.291, n = 241, p < 0.0005 \)). The relationship between these three variables is listed in Table II.

<table>
<thead>
<tr>
<th>Emotional support</th>
<th>Instrumental support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjustment</td>
<td>0.314**</td>
</tr>
<tr>
<td></td>
<td>0.291**</td>
</tr>
</tbody>
</table>

*Note:* **Correlation significant at the 0.01 level
The second hypothesis proposed for diplomatic spouses is:

**H2.** There is a positive relationship between adjustment and satisfaction with life.

The third hypothesis posited is:

**H3.** There is a positive relationship between (a) emotional support and (b) instrumental support and satisfaction with life.

It was necessary to conduct a CFA and structural model based on the structural equation model (SEM) technique to test these hypotheses. This method was appropriate since SEM applies a confirmatory approach to the analysis of structural theory. If goodness-of-fit is adequate, the model supports the plausibility of postulated relations among variables, and if not, such relations are rejected (Byrne, 2010; Kline, 2016). Findings from the CFA confirmed that the hypothesized model presented in the present research, and illustrated in Figure 1, is a four-structure model, as hypothesized. The four-factor CFA model, where “sup1” is instrumental support, “sup2” is emotional support, “adj” is adjustment and “sat” is satisfaction with life, is provided in Figure 2.

![Figure 2. Four-factor CFA model](image-url)
The goodness-of-fit indices were deemed satisfactory; the $\chi^2/df$ was 1.66, CFI was 0.98, RMSEA was 0.049 and SRMR was 0.036. The loadings of these items were also high and, in most cases, more than 0.7. The model fit information is listed in Table III.

The covariances between factors were also satisfactory. The covariance was higher than 0.7 in only one case, i.e. between instrumental support and emotional support, with a value of 0.72. An SEM was conducted based on the CFA measurement model to investigate the second and third hypotheses. The SEM is illustrated in Figure 3.

The goodness-of-fit indices were deemed satisfactory: the $\chi^2/df$ was 1.86, CFI was 0.98, RMSEA was 0.056 and SRMR was 0.037. The model fit information is listed in Table IV.

The $R^2$ was 0.49, which indicates that the model explains almost half of the variance regarding satisfaction with life. However, in the model based on the regression analysis, the $R^2$ was considerably lower at only 0.29. The loadings of the items were also high, with adjustment having the highest loading with 0.49, followed by emotional support with a loading of 0.27 and instrumental support with 0.14. Based on these results, the adjustment seems to be of the highest importance with its three items: housing conditions, shopping, and entertainment/recreation facilities. These findings support $H2$ and $H3$.

<table>
<thead>
<tr>
<th>Value</th>
<th>Threshold</th>
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<tr>
<td>CMIN/df 1.659</td>
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</tr>
<tr>
<td>RMSEA 0.049</td>
<td>&lt; 0.05</td>
</tr>
<tr>
<td>CFI 0.979</td>
<td>&gt; 0.95</td>
</tr>
<tr>
<td>SRMR 0.036</td>
<td>&lt; 0.05</td>
</tr>
</tbody>
</table>

Table III. Model fit information for four-factor model

<table>
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</thead>
<tbody>
<tr>
<td>CMIN/df 1.664</td>
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<tr>
<td>RMSEA 0.05</td>
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</tr>
<tr>
<td>CFI 0.979</td>
<td>&gt; 0.95</td>
</tr>
<tr>
<td>SRMR 0.036</td>
<td>&lt; 0.05</td>
</tr>
</tbody>
</table>

Table IV. Model fit information for the SEM model

<table>
<thead>
<tr>
<th>Value</th>
<th>Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>$R^2$ 0.492</td>
<td>&gt; 0.3</td>
</tr>
</tbody>
</table>
5. Discussion

The present research involves an analysis of survey data provided by spouses of diplomats employed by Foreign Ministries within the EU and the EEA. This study used a standardized questionnaire to examine the relationship between adjustment, social support and satisfaction with life. All proposed hypotheses are confirmed. First, this study demonstrates that there is a positive relationship between adjustment and both emotional and instrumental support for diplomatic spouses. This finding indicates that spouses who experience high levels of emotional and instrumental support are more likely to adjust well to their new local environment and life in the host location. These findings are also in line with studies by Caligiuri and Lazarova (2002), Herleman et al. (2008) and Kupka and Cathro (2007), which indicated that social support during a global assignment is potentially critical for adjustment to international assignments. In a similar vein, Krammer et al. (2001) found that employer spousal support significantly correlated to general adjustment.

Furthermore, research has demonstrated that expatriation and recurring relocation can cause potentially significant problems for an individual’s psychological well-being (Foyle et al., 1998). One potential problem area is social and emotional costs, especially for families when employment support systems and local networks are disrupted (Caligiuri et al., 1998; Haslberger and Brewster, 2008; Shaffer and Harrison, 2001). Additionally, other strains such as communication difficulties, isolation or unfamiliar social encounters can occur, particularly when international expatriates encounter cultures highly different from their own (Anderzén and Arnetz, 1997; Zheng and Berry, 1991). Foster (2000) has argued, for example, that it is rare that employees and their dependents are psychologically capable of continually relocating across regions, never laying down roots, remaining distanced from family and friends and adapting to a new culture every few years. The findings are important because Shaffer et al. (2001) found that employer spousal support can reduce assignment withdrawal symptoms and Konopaske et al. (2005) noted that it is vital to increase spousal willingness to accept long-term global assignments. In the context of costs associated with expatriate failures or early returns and the challenges related to the commitment and loyalty of the new generation entering the workforce, these findings provide an important indication that the Foreign Ministries in EU and EEA could benefit from considering the social support they provide to spouses. Based on hierarchical multiple regression authors did control for age and gender. As mentioned above, the findings showed that these controlled variables did only explain around 0.5 percent of the variance in satisfaction with life. Based on these findings it was concluded that age and gender did not have an effect in explaining the variance of satisfaction with life. One has to bear in mind that in our sample 84 percent of the participants were female. Therefore it is recommend to keep in mind the study by Selmer and Leung (2003a, b) indicating males and females act differently to an international assignment and that female spouses get more support from companies than males do. Furthermore, Davoine et al. (2013) found differences of the expatriate spouse role. On a similar note Collins and Bertone (2017) found that men experienced threats to their carrier/work identity, whereas women faced multiple threats to identities such as mother wife/partner, child, along with carrier and work identity. Finally, male spouses have been found to experience social isolation due to their small numbers and receiving little understanding of their changed circumstances and new role. This has been associated with the feeling of loss of status related to being the breadwinner (Harvey and Wiese, 1998; Cole, 2012).

The present research also demonstrates a positive relationship between adjustment and satisfaction with life for diplomatic spouses. This finding indicates that spouses who experience high levels of satisfaction with life also experience high levels of adjustment. Satisfaction with life is an indicator of subjective well-being, and although the concept has
been examined for various sub-groups, there is still a limited understanding about the
relationships between adjustment and satisfaction with life for expatriate spouses in
general. Moreover, the results of the present study are important from an environmental
perspective. For instance, Veenhoven (1994) has argued that happiness reacts to life
transitions, both positively and negatively. Therefore, this is an important indicator of how
spouses experience life once they have moved to a new location. Diplomats and their
spouses relocate every few years, and consequently, it is important that spouses experience
their transition and life in a new environment as satisfying and fulfilling. The results of the
present study further indicate that aspects related to adjustment, i.e. housing, shopping and
entertainment are the most important. This finding is in line with a study by Davoine et al.
(2013), which included a dramaturgical analysis of diplomatic and consular spouses’ roles
while on an assignment. Their results indicated, for example, that partner representation of
the home country at events, developing links with and within the home country’s local
expatriate community, providing administrative support and supervising local staff and
service house supervision are all considered part of the role of the diplomatic spouse.

Furthermore, this study’s findings indicate a positive relationship between satisfaction
with life and both emotional and instrumental support for diplomatic spouses. Specifically,
when spouses experience high emotional and instrumental support, they also experience
high levels of satisfaction with life. However, these findings are not consistent with a study
by Herleman et al. (2008), which did not find a significant relationship between social
support and satisfaction for expatriate spouses. Therefore, further investigation is needed
into why this inconsistency exists. On the other hand, the present study’s results are
consistent with studies by Lu’s (1999) and Gallagher and Vella-Brodrick’s (2008), which also
revealed a positive relationship between social support and happiness and well-being.
Finally, the results of this study reveal that both adjustment and support account for
49 percent of the variance in satisfaction with life. Prior research has revealed that spousal
adjustment is an important factor for overall international assignment success. Being able to
navigate a new cultural setting has been found to be a part of the adjustment process, and a
low ability to interact with and adjust to a new culture has been associated with both
uncertainty and anxiety (Gudykunst, 2005). As Kim (2005) suggested, being able to adjust
requires a combination of communication adaptability and interactional involvement, where
assimilation and learning by doing are important. Emotional support, on the other hand,
represents care, concern and sympathy, and belonging to a social group. The feeling of
adjusting and receiving social support can thus be considered important because it explains
a considerable part of how diplomatic spouses experience satisfaction with life.

Regarding practical implications, this study demonstrates that the well-being of
diplomatic spouses can be enhanced by considering how social support is provided, their
level of adjustment, and satisfaction with life. Emotional support can be provided by
introducing spouses to social groups in the host location as well as local support or mentors
who have resided in the same location, or by other means. The importance of adjustment
can be addressed by offering training programs prior to departure or shortly after arrival.
Equipping spouses with practical strategies and tactics to cope in the new environment
might be beneficial and increase the likelihood of adjustment. Such training could also
provide spouses with a realistic view of what to expect in the new location and thus,
contribute to satisfaction with life in the host country. Since the present study also found
instrumental support to be related to adjustment, it is recommended that the Foreign
Ministries evaluate what type of assistance spouses deem valuable when relocating.
For instance, the human resource manager (HRM) must develop a sense of the way in which
social identities are forged partly as a result of belonging to various groups because group
membership provides a means of gaining access to social networks. Thus, being part of
support groups consisting of other expatriate spouses can aid cross-cultural adjustment.
As such, the HRM should create opportunities for expatriate spouses to join either formal or informal clubs and organizations such as charity groups, health clubs, and welcoming and support committees for expatriates. The transition into a new environment may further be eased through access to various venues to meet other people who share similar problems or interests (Punnett, 1997). Moreover, Harvey et al. (1999) have argued that before, during and after international relocation, mentoring can be used as a strategic tool to provide the required contextual, relevant and specific social support, creating a framework to make sense of the situation. In summary, spouses rely on their environment for their identity and require social support to lead emotionally, mentally and behaviorally healthy lives. As noted earlier diplomatic spouses face a number of legal and institutional barriers when looking for work such as losing their diplomatic immunity, by taking up work, some cannot obtain local work authorization and some loose financial support that is allocated to spouse. As a results, diplomatic spouses face even more challenges in relation to work than other expatriate spouses do who are working for companies or are self-initiated. As gender differences have been noted in prior research it is recommended that the Foreign Ministries focus on carrier identity in more detail and aim the social support at bolstering self-esteem though strengthening other positive identities.

5.1 Limitations and future research
Although this study contributes to the literature on cross-cultural adjustment for spouses, certain limitations must be considered. The first limitation concerns method bias, which has been discussed by Dillman et al. (2009), since the data were collected through self-report questionnaires. The second limitation relates to language; because the survey was conducted in English, it is possible that some of the respondents did not understand the questions correctly. Third, geographic location was not controlled for, which represents a limitation in relation to adjustment, as the spouses were residing in locations across the world. It is possible that spouses living in Asia or Africa have more difficulties adjusting than spouses who reside in proximity to their home or within central Europe. The fourth limitation also relates to adjustment. Black and Mendenhall (1990) have argued that adjustment should be expected to increase over time, but the present study only examined adjustment at one point in time, whereas potentially richer data could be gathered by employing a qualitative study and/or using a longitudinal approach.

That said, this study also contributes to existing knowledge about adjustment. A wealth of research is now available on expatriate adjustment, but far less is known about spousal adjustment and well-being during an assignment. Although this study has a narrow focus, as it only investigates diplomatic spouses, the findings are interesting because these spouses relocate more often than do the spouses often included in expatriate spousal research. Since emotional support was found to influence both adjustment and satisfaction with life, it would be of interest to further investigate what type of emotional support expatriate spouses most value. For instance, emotional support represents care, concern and sympathy, as well as belonging to a social group. Further investigation into what type of support is of value would be beneficial taking into consideration the gender aspect and increased number of male spouses entering the diplomatic core. For example, it would be of value to know whether such help as emotional support must be face-to-face or whether it could be offered online. Internet technologies enable engagement and interaction with the possibility of accessing social support in the form of blogs and social networking sites, which are now widely recognized and continue to advance. In this vein, studies have shown that technology-mediated social support has a positive influence on adjustment (Kralik et al., 2006; Nardon et al., 2015). Instrumental support, representing financial support and material resources, also contributes to adjustment and satisfaction with life. With more females and diversity within the diplomatic core, new challenges are presented. The diplomatic core has
been very male dominant where the spouse is female. Prior research has indicated that family members are affected more negatively by women’s decision to work abroad than by men’s decision to do the same (Tharenou, 2008) as well as female expatriates have been found to be more often single or have more career-oriented spouses (Hearn et al., 2008) as a result, it would be worth to know how this translates into the diplomatic core. Furthermore, since many spouses must leave their jobs or place their careers on hold when they relocate (Mäkelä et al., 2011), financial concerns are likely to arise. Dual careers within a relationship are now more common, but constant relocation and other restrictions being a part of the diplomatic core makes it more likely that diplomatic couples earn a living with one income instead of two. As a result, it would be of interest to investigate the sources of instrumental support that diplomatic spouses value. It might be that they value assistance regarding the relocation itself, or other financial support such as developing certain or new skills and abilities. Finally, from the research by Davoine et al. (2013) we know that diplomatic spouses are very much involved in the diplomatic career of their spouses. This calls for a further investigation on changes in the identity constructions of both expatriate and diplomatic spouses examining potential gender differences.

References


Further reading


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