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Guest editorial

The dark side of expatriation: dysfunctional relationships, expatriate crises, prejudice and a VUCA world

Introduction

International assignments and other forms of global employment continue to increase in numbers and complexities (Brookfield Global Relocation Services, 2017; Dickmann, 2018). The high practical relevance of this topic is reflected in the extensive research and tremendous wealth of knowledge about global mobility that has accumulated over the past few decades (e.g. Bader et al., 2017; McNulty and De Cieri, 2011; Shaffer et al., 2012; Shaffer et al., 2016). Highlighting the importance of research in this field, the Journal of Global Mobility, a peer-reviewed journal exclusively dealing with topics around international assignments and global mobility, was inaugurated in 2013.

Looking at the history of research on globally mobile employees, it is evident that a majority of studies has focused on the positive or bright side of working and living abroad. Scholars have mainly looked at well-paid, well-protected, assigned organizational expatriates and have concentrated on understanding what makes an assignment successful, including the role of expatriates’ partner and family, selection, training, mentoring or perceived organizational support (e.g. Anderson, 2005; Caligiuri, 2000; Lazarova et al., 2010; Ren et al., 2015; Schuster et al., 2017; Shaffer et al., 2011, 2016). Moreover, researchers have considered how organization, job and community embeddedness affect expatriate outcomes such as retention (Pelokorpi et al., 2015). Other research has looked at expatriates’ role in transferring knowledge and spanning boundaries between host country and headquarters (Burmeister and Deller, 2016) and addressed reverse expatriation (in-patriation) (Harvey et al., 2000; Reiche, 2011; Schuster et al., 2019), in which foreign employees are delegated from foreign subsidiaries to the headquarters of MNCs (Collings et al., 2009). Consequently, such a positive focus on expatriation has also been adopted to examine successful repatriation from various perspectives (Breitenmoser and Bader, 2016; Breitenmoser et al., 2018; Knocke and Schuster, 2015; Kraimer et al., 2012; Lazarova and Cerdin, 2007). All in all, these research efforts have contributed significantly to both theory and practice while firmly establishing global mobility as an important field of research.

In contrast with the dominant positive focus, a few global mobility researchers have sought to explicate the “dark side” of expatriation. For instance, early scholars assessed the challenges and difficulties that come along with adjusting to a new environment (Black, 1988; Black and Gregersen, 1991; Black et al., 1991) with the majority of subsequent research on adjustment applying a stress perspective (Takeuchi, 2010). Other scholars have gazed into darkness by looking at the risks of expatriation in hostile environments (Bader, Reade and Froese, 2019; Bader and Berg, 2014; Bader and Manke, 2018; Bader and Schuster, 2015; McPhail and McNulty, 2015), discrimination and hostility (Bader et al., 2018; Hutchings et al., 2013), and expatriate divorce (McNulty, 2015). Yet another stream of research has explored drivers of assignments failure. Among the many factors associated with “failed” assignments (for an overview, see Harzing, 1995), scholars have identified personal crises like burnout (Bhanugopan and Fish, 2008), insufficient work environments, high workloads and poor work-life balance (Bader et al., 2018), as well as extreme occupations (e.g. oil and gas, security and terrorism, international aid) where work life strongly impacts one’s private life. Furthermore, researchers have recognized that expatriates face unexpected challenges upon repatriation such as career derailment or
reverse culture shocks (Breitenmoser and Bader, 2019; Ho et al., 2016) that cause trouble in the aftermath of an international assignment.

Researchers have also begun to expand the scope of global mobility beyond expatriation to include other forms of global mobility. For instance, every year, thousands of migrants relocate to other countries to take on low paid service and hospitality work, agricultural and horticultural labor, construction jobs or domestic work – often under questionable conditions. Buckley (2012) highlighted the tragic experiences of Indian migrant construction workers in Dubai, and the economic insecurity they faced when they lost their jobs after the collapse of the emirate’s construction sector. Other research points at people being forced into unemployment or being employed in jobs below their qualifications, such as a Syrian Medical Doctor working as a nurse or taxi driver (Ariss et al., 2013).

The expatriate literature is rife with many very interesting approaches, and we believe that more explorations of the dark side of expatriation will advance our understanding and help us to develop a more holistic perspective of global mobility. Therefore, with this Special Issue, our intent was to give this research a platform and solicit research dealing with the dark side of being a globally mobile employee. Aware that this topic is still rather nascent, we are pleased to report that among the submissions reviewed, we identified two conceptual and one empirical articles could be included in this Special Issue. All have undergone an intensive process of revisions where the authors showed great dedication and effort, and we believe that these three very intriguing and thought-provoking pieces provide a strong foundation for future work in this area.

Articles in this special issue

The first article in this Special Issue, entitled “A model of the dark side of expatriate-host country national relationships,” is authored by Ljubica, Shaffer, Tin and McKouen. In their qualitative study based on 27 semi-structured interviews with both expatriates and host country nationals (HCNs), they develop a nomological model of the dark side of the relationship between expatriates and HCNs. Focusing on disruptive relationship behaviors expatriates and HCNs exhibit toward each other, the authors investigate antecedents of such behaviors and mechanisms through which these behaviors affect the relationship between expatriates and HCNs. The authors find that relational dysfunction emanates from multilevel differences and ambiguities between expatriates and HCNs because these are likely to increase emotional, social, instrumental and opportunity costs. In fact, based on these differences and misunderstandings, expatriates and HCNs socially categorize each other negatively and detach themselves from the relationship. This, in turn, leads to disruptive relational behaviors amplifying conflicts and detachment dynamics, worsening interpersonal and intergroup dynamics. In the end, this results in relational breakdowns. With this approach, Ljubica et al. are the first to analyze the nomological network of negative relationship dynamics and ambiguities between expatriates and HCNs, and therefore deliver novel insights on how such dynamics evolve. As relationships with HCNs are a key component of international assignments, addressing the risk of downward spirals deepens our understanding of an important issue of the dark side of expatriation.

In the second article, “Highway to hell? Fit-dependent expatriate crisis events and how to deal with them,” McNulty, Lauring, Jonasson and Selmer develop a conceptual model for expatriate crises. While expatriation is often related to positive outcomes such as adjustment, knowledge gain or personal development, this paper highlights the dark side of expatriation in a very explicit manner. In particular, it focuses on the occurrence of fit-dependent crises, i.e. when the crisis is triggered by maladjustment or acculturation stress in the new country. Drawing from literature on crises and expatriation, the authors’ theoretical model depicts the complexity of experiences and identifies four potential domains of expatriate crises, i.e. the personal, family, organizational and host national
domains. They also discuss how actors in the organization and the larger social network can directly or indirectly influence the expatriate, for instance through the involvement of external specialists like embassies, lawyers, or medical professionals. By discussing those four domains in which expatriate crises can originate and outlining how different actors can assist the expatriate at different stages of crisis, they provide a solid theoretical and practical contribution to literature on global mobility by highlighting the importance of examining the dark side of the phenomenon.

Finally, in their article “Congruence of economic mobility beliefs and immigrants’ self-esteem,” Guerrero and Turchick Hakak conceptualize the impact of economic mobility beliefs among immigrants and HCNs. Applying the terror management theory, they develop a relational model that addresses how economic mobility beliefs of immigrants and HCNs interact with other factors and how these different combinations of beliefs affect immigrants’ self-esteem. One core implication of the study is that the uncertainty and vulnerability associated with living in hostile environments makes immigrants’ mortality more salient. A lack of confirmation of immigrants’ economic mobility beliefs from HCNs can lead to a decrease in immigrants’ self-esteem, and this, in turn, manifests itself in negative work outcomes. With regard to the growing number of immigrants, focusing on perceptions of immigrants by HCNs and their impact on immigrants’ self-esteem is of increasing importance. By focusing on this important aspect of the dark side of global mobility, Guerrero and Turchick Hakak address a timely topic that is relevant for both academics as well as practitioners.

Future avenues: VUCA in the field of global mobility

These articles demonstrate in a profound and illustrative way the importance of further consideration of the dark side of global mobility. Therefore, the articles in this Special Issue are a valuable starting point and pave the way for further research. Adding to this, we want to outline that there are plenty of novel research areas and questions that need to be answered in order to better understand the dark side. These areas might include questions on ethics in expatriate leadership, discriminatory behavior abroad and unmet expectations. For instance, what do we know about negative leadership experiences in the global mobility context? Do globally mobile employees engage in abusive leadership or discriminatory behavior toward HCNs? In other words, do leadership values and ethics change when abroad, in particular when globally mobile employees are facing an environment in which ethical norms differ from their home country? How do expatriates respond to the tensions that arise when cultural values clash? Do they succumb to corrupt practices or turn a blind eye when their HCN colleagues engage in such behaviors? Furthermore, if such behavior occurs, what can organizations do to protect individuals from such experiences? On the other hand, we need to ask if and how foreign work practices might contradict globally mobile employees’ values and how they react to discriminatory work practices affecting themselves or others working with them? We also need more research looking at what kind of work practices foster frustration among expatriates and how expatriates cope with that. Finally, there is also a dark side of repatriation. Expatriates may feel “betrayed” after their return because they feel that their psychological contract has been violated if their career does not progress as expected. We need to shed light on what unsuccessful repatriation means for expatriates’ future careers and how companies can attract staff for less attractive international assignments without making promises for their future career that cannot be kept.

Above and beyond challenges expatriates themselves face when relocating abroad, there are also novel challenges for the global mobility function as well as for other types of globally mobile workers. While business leaders and HR managers are not using the term “dark side,” they acknowledge that global mobility is becoming increasingly complex and
challenges have changed and intensified over the years. For instance, recent changes in
the political environment of many countries or the magnitude of changes in the
technological environment have strong implications for global mobility as they increase
ambiguities and complexities, both for expatriates as well as global mobility departments.
Also, increased immigration around the world has resulted in challenges for
organizations. Although immigrant employees are often a vital source of creativity and
innovation, they often face difficulties adapting to a new and culturally different work
environment. Among some of the conundrums they face are ostracism, antagonism and
identity conflicts (Harrison et al., 2018). What can organizations do to foster an
environment that recognizes the value of diversity and that facilitates the successful
integration of immigrants into the workplace?

Looking at the dark side and challenges of these changes, expatriate research and
practitioners have started summarizing them under the term VUCA. The acronym VUCA
refers to the volatility, uncertainty, complexity and ambiguity of a company’s internal and
external environment. While originally introduced in the military context at the end of the
Cold War, the concept has been increasingly introduced to the business context with a broad
applicability. For instance, Dickmann (2016, p. 83) outlines that VUCA is the “reality in
which we as International HR operate.” While VUCA does not explicitly address global
mobility, it is a helpful categorization to analyze how the company’s environment affects
global mobility in the future.

Adopting a VUCA perspective, we derived a framework (see Table I) that clusters what
we consider to be some of the most important challenges and research needs with regard to
the dark side of global mobility. Drawing on the drivers of the VUCA environment, we
outline the effects the respective drivers have on global mobility and what this means for
worthwhile avenues of further research on the dark side of global mobility.

Volatility
Volatility refers to the nature, magnitude and speed of change that occurs within a
company’s internal and external environments. With regard to global mobility, we can see
that global mobility professionals are increasingly confronted with unexpected or unstable
situations of unknown duration. Volatile situations are not necessarily hard to understand
and often global mobility departments have accumulated knowledge and expertise on how
to deal with those situations. However, despite, for instance, having developed standardized
policies (Bennett and Lemoine, 2014), volatile environments can still be challenging. The
nature of change occurs in the political environment (political instability, terrorism, (de)globalization), the economic environment (financial crises, global shifts in power, emergence

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Table I: Areas of global mobility research in a VUCA world
of new and decline of established markets), the social environment (demographic changes, ageing society), the technological environment (digital transformation, big data, artificial intelligence, robotization), legal environment (immigration law, discrimination law, health and safety law) and the ecological environment (climate change) with increasing magnitude and speed. An emerging stream of research has addressed this by looking, for instance, at people management in hostile environments and how companies deal with it (e.g. Bader, 2015; Bader and Berg, 2013, 2014; Bader et al., 2015; Bader, Schuster and Dickmann 2019; Lee and Reade, 2015; Oetzel and Getz, 2011; Reade, 2009).

A recent example of volatile environments in the global mobility function is the unstable political situation in Venezuela, which caused global mobility professionals in various companies – especially in the oil and gas industry – to become active and initiate measures to deal with the new realities. Patrick Pouyanne, CEO of the French oil and gas firm Total, told the press[1] that it became necessary "to evacuate all of our personnel from Venezuela given what has happened" and that the company is no longer able to manage Venezuela from the USA but from Europe. This has severe consequences for the global mobility departments of the affected companies as they not only have to manage the evacuation process, but they must also establish a new team of global experts to take over the business activities in Venezuela from a European location. KPMG (2018) outlined an increasing relevance of non-traditional assignments, including commuter assignments, extended business trips, short-term assignments and project-specific assignments which can be seen as a strong indicator for an increasingly volatile environment of the global mobility function.

The overarching message here is that companies in general and global mobility departments in particular are increasingly demanded to become agile and move away from their process- and compliance-oriented global mobility practices. Dickmann (2018), for instance, outlines that global mobility leaders need to develop agility to align and support a company’s business and HR strategies, to create value and to be able to quickly adapt to changing organizational needs. As a result, he points to the necessity that global mobility professionals need to fill the role of strategic advisors rather than considering themselves as an operational service unit. From a higher level perspective, this means that global mobility departments have to create flexible policies and governance approaches with sufficient room to manage exceptions. Idiosyncratic deals, for instance, which are defined as personalized work arrangements of a nonstandard nature negotiated between employees and their employers (Rousseau, 2001), enable global mobility departments to react flexibly in volatile environments by providing expatriates with incentives that better fit their individual expectations and needs. Of course such idiosyncratic deals create challenges as well, as they might erode trust and motivation of other employees. Therefore, it is critical for global mobility professionals to find the right balance between providing customized incentives and promoting fairness among the workforce. Consequently, we believe that questions in three areas of research need to be addressed in the near future. These are flexibility vs compliance, agility vs stability and idiosyncratic deals vs standardized policies.

Uncertainty
Uncertainty refers to the extent to which one can confidently predict the future. In other words, even though the basic cause and effect of a situation is known, there is a lack of information about the outcome and also change mechanisms are unknown and often unpredictable. Hence, the drivers behind uncertainty are a high degree of unpredictability, along with unknown outcomes and potential surprises. A good example for an uncertain environment is the decision of the UK to leave the European Union (Brexit). Although the outcome of the referendum itself can, at least partially, be considered a surprise, the entire
process after this vote did not necessarily lead to an increase in predictability. Even one week before the actual date (March 29, 2019) to leave the European Union, there was still no clarity about the outcomes.

The ongoing uncertainty puts pressure on MNCs and global mobility professionals alike. There is a wide range of issues that global mobility professionals must consider. From managing the relocation process of entire units when the top management team decides to leave the UK, via re-thinking the instrument of extended business travelers in the case of new visa requirements, to workforce planning for UK subsidiaries – global mobility needs to deal with it. The unknown outcomes of the Brexit require global mobility departments to plan for multiple future scenarios instead of formulating HR strategies based on a single prediction. A variety of other examples illustrate the pervasiveness of uncertainty. For instance, terrorist incidents are non-predictable with regard to when and where they occur; the only thing that seems certain is that there will be further attacks. Hence, global mobility professionals have a strong need for intelligence management and advanced risk analysis. In fact, the security situation around the globe is constantly changing and varies strongly from country to country, region to region and location to location. Professional service providers, such as the exop-group (www.exop-group.com), supply global mobility departments with digital solutions in order to efficiently monitor the occurrence of critical events, assess global country and city risk, and support the management of crisis. This all can lead to detailed scenario planning and eventually help companies to reduce uncertainty.

Complexity
Complexity refers to the number of factors that one needs to take into account, their variety and the relationships among them. Often, tasks are correlated and effects multifaceted. In addition, there are influencers that additionally increase complexity, such as external stakeholders. Managing a global network of subsidiaries and the respective staff was never a simple task. However, the level of complexity has increased due to more and faster availability of data and different regulations in more and more countries. For instance, Dickmann (2016) argues that it ‘takes much effort and in-depth understanding to work with the large range of compliance issues that GM departments face.’ This raises the question of whether HR and respective policies should be centralized vs decentralized. Especially paired with the demographic changes, resulting in large increases in diversity and new societal values and ethics, this seems to increase complexity even further.

Another area that has contributed tremendously to increased complexity is social media. Before social media, the activities of companies abroad seemed to be more isolated. Only huge scandals made it into the news in the home country and thus created awareness among a broader public. However, in times of Twitter and Instagram, within minutes, a topic can get viral and is available all over the world. Consequently, employees are increasingly under potential scrutiny of the wider public, including expatriates. A sound example is the case of a German top executive, in charge of a German logistics company’s subsidiary in Singapore, who got jailed for slapping a taxi driver[2] who refused to pick him up due to being drunk. Though embarrassing, this is a minor incident that probably would have been swept under the carpet in times before social media. However, this was in 2016 and caused quite some attention and the image of the German company was tarnished. The resulting damage control is part of an extended stakeholder management plan, which accounts for stakeholders that only emerged due to the increased complexity.

Finally, knowledge transfer between subsidiaries has increased in importance and complexity as well. Harzing et al. (2016) disaggregate the role of knowledge transfer across management functions, directions of knowledge transfer and type of international assignees. Building on their pioneering work in this direction, research needs to account
for the complexity and shed light on knowledge flows looking at both the bright and the dark side. In particular, it would be useful to consider the role of both expatriates and HCNs in the knowledge transfer process. Cross-cultural dyads are complex and often fraught with attitudes and behaviors, such as distrust and conflict, which inhibit the transfer of knowledge (van Wijk et al., 2008). What skills or personal qualities can expatriates and HCNs draw on to increase the likelihood of developing positive cross-cultural relationships, and what can organizations do to facilitate positive work relationships?

**Ambiguity**
Ambiguity is manifested in a lack of clarity and the difficulty of understanding exactly what the situation is. This means that causal relationships are not completely clear and global mobility professionals cannot rely on past experiences. In fact, there is a clash between ideal and actual outcomes and a lot of room for misinterpretation. Technological disruptions, increased global competition, and again demographic change and new work values are some of the most important contributors to increased ambiguity. With regard to global careers, emphasized by the increased importance of protean careers (Breitenmoser et al., 2018), MNCs need to engage much more in expectation management. Dickmann highlights that there is a broad variety of different assignment types, from business drivers to personal development assignments. However, it is not always clear to the expatriate what the main purpose of his or her assignment is. Therefore, in order to reduce ambiguity, it is essential to mutually manage expectations in order to avoid disappointment at the end of the assignment, for instance, when an expatriate was expecting to get a promotion but then finds out that this is not the case and never was planned. This is very much related to formalizing processes, which is helpful to create transparency and reduce the level of ambiguity.

Another way to handle ambiguity can be achieved by doing research on psychological contracts in the field of global mobility. Psychological contracts are defined as the beliefs of an individual about the conditions of the exchange relationship with their employer (Rousseau, 1989). In other words, they are the implicit, unwritten component connected with the assignment. Not knowing about the respective parts of the contract the employee has in mind bears great potential for ambiguous understanding and, consequently, misinterpretation which in consequence can cause an expatriate to perceive a violation or breach of the psychological contract. Such perceived breach then again may trigger a variety of negative outcomes, like negative affect or attitudes (Rousseau et al., 2018). Consequently, it is critical for GM managers to create clarity, avoid misinterpretation and be as unambiguous as possible.

**Conclusion**
With this Special Issue, we hope to inspire more work on the dark side of global mobility. The three articles included in this issue provide some novel insights into this phenomenon as well as a starting point for future research. In addition, we offer several suggestions for broadening the scope of research in this area. Taking into account that volatility, uncertainty, complexity and ambiguity make today’s global mobility management a lot more challenging and complicated, it is more important than ever for employees and organizations to be prepared to successfully navigate the environments in which they operate.

Given the increasing practical importance of global mobility in multinational companies and the fact that the world seems to become more VUCA than ever before, we hope that our Special issue will inspire more research on the impact of these issues on individuals and organizations. Although the cornerstone has been laid, we are still at the beginning and of this important field of research and would like to see much more to come.
Notes

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A model of the dark side of expatriate–host country national relationships

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Abstract
Purpose – The purpose of this paper is to develop a nomological model of the dark side of expatriate–host country national (HCN) relationships by identifying and explaining the development and the types of expatriate–HCN disruptive relationship behaviors (DRBs), their antecedents and consequences.

Design/methodology/approach – The authors conducted semi-structured interviews (n = 27) with both expatriates and HCNs, focusing on DRBs that they exhibit toward each other, the factors preceding them (antecedents) and the mechanisms through which they affect the relationship between expatriates and HCNs, as well as the outcomes of such behaviors.

Findings – The findings show that relational dysfunction emanates from multilevel differences between expatriates and HCNs, and these differences induce workplace conflicts. These conflicts increase relational (emotional, social, instrumental and opportunity) costs that render both dyadic members to evaluate their relationship and socially categorize each other negatively, thus, detaching from the relationship. This detachment then leads to disruptive relational behaviors that amplify the conflicts and detachment dynamics and worsen interpersonal and intergroup dynamics, ultimately resulting in relational breakdown.

Research limitations/implications – This study possesses methodological (e.g. relatively small number of interviewees) and conceptual (e.g. high degree of comprehensiveness) limitations. However, these offer implications for further research as they open a multitude of promising research avenues that could enhance the proposed model.

Originality/value – This is the first study the authors are aware of that focuses on discovering and explaining the nomological network of the dark side of expatriate–HCN relationships. The use of interdependence theory to understand cross-cultural relationships is novel. As such, it delivers theoretical and empirical contributions and fosters further research efforts.

Keywords Expatriates, Host country nationals, Dark side, Cross-cultural relationships

Paper type Research paper

Introduction
Although early research on expatriates focused on clarifying the difficulties of adjusting to a new environment (Black, 1990; Black et al., 1991, 1992; Black and Mendenhall, 1990), over the last 30 years, most studies have concentrated on understanding what contributes to assignment success. In particular, scholars have tended to target three key indicators of success: adjustment,
performance and retention (see Bhaskar-Shrinivas et al., 2005, for a review). These assessments of the bright side of expatriation have enhanced our theoretical and practical knowledge of expatriates, but they have also obscured our view of the potentially dark side of being an international assignee. Consequently, as the editors for this special issue suggest, it is time to return to our roots and hone in on the dark side of global mobility.

The purpose of this study is to explore the dark side of one important aspect of expatriation – the relationship between expatriates and host country nationals (HCNs). Rather than ask how expatriates and HCNs can develop and maintain effective relationships, we ask how and why expatriates and HCNs fail to form and nurture quality relationships with each other. International assignments carry with them a high degree of uncertainty stemming from cross-cultural settings, and both expatriates and HCNs often struggle to establish productive relationships with people whose value systems, beliefs, customs, manners and ways of conducting business differ from their own (Feitosa et al., 2014). Despite our awareness of these struggles, however, we know very little about the behaviors of expatriates and HCNs that destroy rather than foster effective interpersonal relationships.

In reviewing the scant literature on the dark side of expatriate–HCN relationships, we noted two consistent patterns. One has to do with the tendency to focus on negative behaviors that simply mirror positive behaviors. That is, research on the bright side of expatriate–HCN relationships primarily investigates socializing and supportive behaviors, while studies on the dark side target the lack of such behaviors (Sonesh and DeNisi, 2016; Toh and DeNisi, 2007). This pattern is consistent with the general field of organizational behavior, which has also tended to emphasize the bright side of relationships. Scholars have conceptualized a variety of interpersonal behaviors that promote workplace relationships when employees engage in them and that hinder these relationships when employees fail to exhibit them. These include organizational citizenship behaviors (Organ, 1988), pro-social organizational behavior (Brief and Motowidlo, 1986) and interpersonal citizenship behavior (Settoon and Mossholder, 2002). Other organizational behavior scholars interested in the dark side of interpersonally directed behaviors (O’Leary et al., 2000), however, have examined distinct socially disruptive actions such as yelling, rudeness and threats. These have been studied under multiple labels, including interactional injustice (Bies and Moag, 1986), workplace bullying (Leyman, 1996), abusive supervision (Tepper, 2007), political/interpersonal deviance (Robinson and Bennett, 1995), workplace incivility (Andersson and Pearson, 1999), harassment (Bader et al., 2018) and interpersonal conflict (Spector and Jex, 1998). Comparable behaviors that distort and/or disrupt relationships between expatriates and HCNs, however, have not been examined. Consequently, we are interested in identifying specific behaviors (i.e. those that represent bipolar constructs ranging on a continuum from positive to negative behaviors as well as those that are inherently negative) that damage or sever interpersonal ties between expatriates and HCNs. This leads us to our first research question:

**RQ1.** What interpersonal behaviors do expatriates and HCNs enact that disrupt their relationship with each other?

The other pattern that we observed in the expatriate literature has to do with a focus on the victims and not the perpetrators of dark behaviors. For example, in most studies about the lack of socializing and supportive behaviors, researchers have positioned these behaviors as the independent variable and examined their effects on the relational partner (e.g. Andersson and Pearson, 1999; Cortina et al., 2001; Spector and Jex, 1998). Other studies of expatriate–HCN relationships have focused on negative outcomes experienced by the victim (e.g. expatriate maladjustment, poor performance and poor job attitudes). Hence, research victimizing expatriates has demonstrated that expatriate–HCN low contact quality (Van Bakel et al., 2015) and negative personal affect (Kang and Shen, 2018) adversely affected expatriate interaction adjustment. Also, HCN’s lack of informational, social and emotional support negatively
contributed to all facets of expatriate adjustment (Blaskar-Shrinivas et al., 2005; Bell and Harrison, 1996; Black and Mendenhall, 1990; Bjorkman and Schaap, 1994; Lee and Van Vorst, 2010; Suutari and Brewer, 1998) and expatriate performance (Pinder and Schroeder, 1987). Research victimizing HCNs, on the other hand, reciprocally related HCN perceived organizational compensation policy discrimination or HCN–expatriate compensation parity to HCN's perceptions of pay fairness (Bonache et al., 2009), pay satisfaction, turnover intention, organizational commitment (Chen et al., 2002), job satisfaction, evaluation of and satisfaction with expatriates (Leung et al., 2014) and informational support to expatriates (Chen et al., 2011). Given this emphasis on the victim rather than the perpetrator of dark relational behaviors, we know very little about the antecedents and the relational consequences of the relationship disruptive behaviors enacted by expatriates and HCNs. This prompts our next two research questions:

RQ2. What are the antecedents of disruptive relationship behaviors (DRBs) enacted by expatriates and HCNs?

RQ3. What are the relational consequences of DRBs enacted by expatriates and HCNs?

After answering our first three research questions, we hope to construct a nomological network that connects the DRBs of expatriates and HCNs with theoretically based antecedents and consequences. Extant studies on negative expatriate–HCN relationships provide some clues, but these are limited in that they only focus on two types of interpersonal behaviors (socializing and supporting) and, for the most part, it is HCNs that exhibit these behaviors toward expatriates. In terms of socializing behaviors, prior studies have shown that expatriates struggle with social acceptance in the host unit context due to their status as outsiders (Stoermer et al., 2017). In this vein, Sonesh and DeNisi (2016) drew on social identity theory (Tajfel and Turner, 1985) and social categorization theory (Turner, 1981, 1985) to show that HCNs' social categorization of expatriates preceded and conditioned their socializing behaviors toward expatriates; the more negatively (out-group) HCNs categorized expatriates, the less willing they were to display such behaviors. Similarly, research found that negative social categorization adversely affected HCNs informational support to expatriates and hampered expatriate–HCNs exchange of knowledge (Bruning et al., 2012; Florkowski and Fogel, 1999; Toh and DeNisi, 2005). In addition, negative social categorization has been shown to result in significant adverse consequences for relational interdependence and intergroup behavior, entailing stress and infringed job attitudes, as well as severe psychosomatic conditions such as social anxiety or depression, leading to emotional detachment, and finally relational and work withdrawal (Bell et al., 2013; Crocker and Lawrence, 1999; Leonardelli and Toh, 2011). Existing research has also associated negative social categorization of expatriates by HCNs with low availability of information on expatriates (Toh and DeNisi, 2003), the lack of willingness of HCNs to support expatriates (Varma, Pichler and Budhwar, 2011) and weakened HCN–expatriate intergroup collaboration (Leonardelli and Toh, 2011).

As for supporting behaviors, researchers have focused on the lack of informational (role) and social support of HCNs toward expatriates and identified significant associations with various concepts: negative personal affect toward expatriates (Varma et al., 2016), ethnocentrism (Varma, Pichler and Budhwar, 2011), perceived HCN–expatriate low value similarity (Pichler et al., 2012), low contact quality (Van Bakel et al., 2015), perceived compensation disparity (Leung et al., 2014) and negative social categorization of expatriates (Varma et al., 2006). Even though these studies aid our theoretical understanding of the phenomenon of the dark side of expatriate–HCN relationships, the fact that researchers have used a variety of individual, relational and contextual concepts in differing and often overlapping (dependent and independent) roles has blurred our understanding of the genesis and the aftermath of disruptive relational behaviors of expatriates and HCNs. Thus, we ask:

RQ4. What is the process whereby relationships between expatriates and HCNs breakdown?
To answer these research questions, we adopt a qualitative approach whereby we interview both expatriates and HCNs to probe answers to our research questions and to develop a nomological network that details the DRBs of expatriates and HCNs, including the factors that precede such behaviors and their underlying mechanisms, as well as their relational consequences. In doing so, we first describe our methodology and our findings. We then elaborate our selection of an explanatory theory as an overarching framework for our proposed model of the DRBs of expatriates and HCNs. Finally, we discuss the contributions and relevance of our model, identify limitations of our study and provide promising future research avenues.

Methodology

Data collection

Given the nascent state of research on the dark side of relationships between expatriates and HCNs, we adopted an in-depth qualitative approach using semi-structured interviews with both expatriates and HCNs. This approach provides rich descriptive data that allow for more specific insights into the phenomenon (Bjørnholt and Farstad, 2012; Edwards and Holland, 2013). Unlike other methods, this technique not only enabled us to examine the role and importance of the concepts put forth by prior studies but also allowed our interviewees to shed light on other, previously unreported aspects, resulting in the development of a more comprehensive nomological network.

Our literature review and research questions provided us with a basic framework for developing and organizing our interview protocols. We tailored the protocols specifically to expatriates and HCNs using wide-reaching, open-ended type questions that served as guidelines, not only allowing us to examine the phenomenon objectively, but also facilitating the expression of interviewees' insights based on their own experiences (see the Appendix for protocols). This permitted us to follow topical trajectories within the conversation that sometimes deviated from our protocol, enabling us to chart nomological areas of the phenomenon, concepts and the dynamics between them. We conducted 27 interviews, 12 face-to-face and the others via Skype software. The interviews were executed in Chinese, Spanish and English languages. We translated and back translated the interviews in Spanish and Chinese to ensure consistency and prevent data misinterpretation. Having native Chinese and TOEFLITP certified Spanish speakers on the research team allowed us to eliminate (back) translation and interpretation errors. We recorded all interviews, secured signed consent forms from all participants and collected demographic data via questionnaire surveys that were also tailored specifically for both expatriates and HCNs.

Sampling

Since past research took an exclusively polarized HCN or expatriate-centric point of view, we targeted both groups to grasp more detailed and unbiased perpetrator perspectives about the researched phenomenon. We focused on corporate or assigned expatriates, defined as those temporarily relocated by their organization, usually for several years, to complete a specific task or accomplish an organizational goal (Biemann and Andresen, 2010). We did not include self-initiated or academic expatriates, diplomats, immigrants and short-term assignees because of their different motives for relocating and the different durations of assignments. In short, we aimed for a sample of connoisseurs – knowledgeable interviewees with extensive relational experiences. Hence, our inclusion criteria for the expatriate sample were minimal host tenure of 1 year, organizational tenure of 10 years, international experience of 5 years and minimum of one host country worked in prior to the current assignment. Expatriate participants had to have a firm intention to repatriate or relocate after the current assignment to avoid the inclusion of immigrants. For HCN participants, we included only those who worked directly with expatriates. Inclusion criteria for this group were a minimum of five years of experience working with expatriates and...
minimum organizational tenure of five years. While we acknowledge the fact that the period of five years would probably be adequate for both groups, we extended the expatriate tenure requirement to 10 years in order to capture those who had multiple assignments, including working with diverse HCNs.

To achieve maximum sample diversity in terms of data collection locations and across demographic factors, we used a snowball method to collect data from 17 expatriates and 10 HCN co-workers from two culturally distinct locations, Mexico and Hong Kong. The majority of expatriates were stationed in Mexico while the majority of HCNs worked in Hong Kong. Major nationalities in the expatriate sample were the USA (n = 4) and the UK (n = 2) with the remaining nationalities dispersed across 11 different nations. In the HCN sample, most interviewees held Hong Kong nationality (n = 7) with the rest of the nationalities dispersed across three countries. Age in the expatriate sample ranged from 31 to 64, with an average age of 47; seven had a bachelor’s degree, seven had a master’s degree and three had a PhD. In the HCN sample, the average age was 43 years and, in terms of education attainment, six interviewees had a bachelor’s degree and four had a master’s degree. The major management level of expatriate respondents was senior level management (n = 17) and that of HCN interviewees were middle (n = 6) and lower (n = 4) level management, placing expatriates in the supervising role relative to HCNs. Industrial ratio had the lowest diversity in our sample with most participants in both samples working in service industries. The average host tenure for expatriates was 2.1 years and average organizational tenure was 13.5 years; for HCNs, the average tenure was eight years. Expatriates accumulated substantial international experience averaging 24 years across approximately three countries while HCNs, on average, had 14 years of experience working with expatriates. Please refer to Table I for the demographic characteristics of the two samples.

Coding

Our coding process entailed three phases. In the first phase, we selected a portion of the data (i.e. the set of responses to a specific question) from both expatriates and HCNs that we independently examined and proposed a set of codes. We then compared proposed codes and discussed and agreed on an initial integrated (i.e. expatriates and HCNs) codebook. We paid close attention to the relevance of codes to research objectives and questions and whether the code actually emerged in the text.

In the second phase, we undertook three iterative rounds of coding: inter-coder reliability (ICR) assessment, codebook modification and recoding on a sample of 20 percent of transcripts.
until we achieved a satisfactory level of ICR, as suggested in prior studies (Campbell et al., 2013; Hodson, 1999). For our ICR coefficient, we selected the negotiated agreement percentage that measures the percentage of decisions where coders agree (Popping, 2010). Despite being criticized for its tendency to overestimate the degree of ICR by not taking agreement by chance (coders agreeing occasionally by chance; Morrissey, 1974) into account, we chose not to employ other available ICR coefficients for several reasons. First, we had a somewhat large number of codes in the initial codebook \((n = 64)\), which reduced the likelihood that coders agree by chance (Grayson and Rust, 2001). Second, unlike other coefficients, our principal intent in coding and the study aim was not to generate variables for use in statistical analysis, but rather to systematically classify the text and inductively interpret it to elucidate a destructive social phenomenon, which reduces the need for other ICR coefficients (Kurasaki, 2000). We calculated ICR per code by dividing the number of times that all coders used it in the same text unit by the number of times that any coder used it in the transcript, and for the overall (codebook) ICR we divided the number of coding agreements by the number of agreements and disagreements combined. In the first coding round, the average ICR was 0.32 and overall ICR was 0.59. Since the acceptable level of ICR falls between 0.80 and 0.90 (Miles and Huberman, 1984), we revised the codebook by eliminating unreliable codes, merging and modifying the codes and clarifying code definitions, while striving not to sacrifice meaning by simplifying it at the expense of a high(er) ICR. Hence, in the second coding round, average ICR was 0.53 and overall was 0.75, while in the final coding round, the average ICR was 0.72 (entailing sixteen final codes) and overall was 0.83. It is important to report we did not experience the problem of unitization whereby units of analysis are not naturally given (i.e. sentence or paragraph), but require subjective interpretation of the coder, which may result in different coders unitizing the same text differently as they disagree on which segments of text contain a particular meaning (Kurasaki, 2000). We believe the fact that all coders were immersed in the study equally and were similarly knowledgeable about the topic, together with a fairly small total amount of data (27 interviews), resulted in comparable coding which neutralized this problem.

Having achieved a satisfactory ICR, we decided we were ready for the final deployment phase (use of the representative codebook on the full set of data). Scholars have argued that high values of ICR justify the choice for one coder over two or more coders during the deployment phase (Campbell et al., 2013; Dunn, 1989). For control reasons, however, we assigned two coders (i.e. principal and control coder) to code the remaining transcripts, after which we calculated the ICR again. Having taken the preceding steps and subsequently engaging in a more objective-focused and comprehensive coding process, the coders were able to assign adequate codes to the relevant units of text which, together with a fairly small cumulative amount of data (27 interviews), resulted in an average ICR of 0.81 and overall ICR of 0.92.

### Categorization

In the categorization stage of the study, we clustered the developed codes into main themes and varietal categories and subcategories. We identified the themes according to the homogeneity vs heterogeneity of characteristics within vs between the (sub)categories. Our focus was not on the measurement or any other sort of metrics of the identified categories. Rather, we analyzed our data to identify the representative categories and to assess their role in the development of the relationships between expatriates and HCNs. As depicted in Table II, our analysis yielded five emergent themes.

The first theme has to do with the DRBs of expatriates and HCNs. The second, third and fourth themes represent the antecedents of the DRBs; these include expatriate–HCN differences (i.e. socio-cultural, organizational and personal), workplace conflicts (i.e. miscommunication and misbehavior) and relational detachment. The fifth theme includes the relational consequences of DRBs. Below, we elaborate on each of these themes, and in doing so we provide answers to our research questions.
Themes

Representative quotations across categories

**Expatriate–HCN Differences**

**Social-cultural**

**General-relational**

Expatriate: [...] You’re different. You’re so obviously different, you know? You speak a different language, you look different, you sound different. So I think that they (HCNs) do treat you differently [...] All of my local colleagues will think of me as a French guy, always, and that will not change.

HCN: [...] but from my previous experience, I do see some of those behaviors, expat people take advantage from situations or they think they are a premium, or they are better compared with us locals [...] They don’t have understanding or appreciation of local culture [...]

**Professional**

Expatriate: It’s like I can almost hear the locals telling me - Hey, you are a foreigner here, and we don’t do things on time nor right, we do things wrong, we’re backwards as can be, and why are you challenging our beloved culture [...] and I just thought, God, that’s the saddest thing I ever heard in my life.

HCN: [...] he was a workaholic and he was expecting us to be the same. I mean, if I did all of my tasks and if you want to stay late in the office, that’s OK with me, but don’t count on me to take time away from my family just so you can analyze two more tables [...] 

**Organizational**

Expatriate: [...] there’s this feeling among the locals, they’re kind of unhappy of the foreigner, especially because some of the foreigners get paid more, and so there’s this [...] they don’t like that [...] they also don’t seem to care that the foreigners are not the ones who define compensation policies [...] 

HCN: After she (expat) came, I already asked twice to leave the company. Once for economic reasons, because my salary was reconfigured into commission based and that wasn’t fair. And the second one because I knew the objective, but didn’t know how to do it nor who to ask. I like to have a clear order, clear process of how to get there.

**Personal**

Expatriate: [...] it’s quite hard to build genuine friendships with Hong Kong people who have never had similar experiences as you [...] 

HCN: After a while, I realized that my persona doesn’t really fit their mode and they (expats) aren’t satisfied with it (laughs). I do not feel good because it is my personality [...] how can I change it [...] besides, I do not see what is wrong with it [...] 

**Workplace conflicts**

**Miscommunication**

Expatriate: I am a very analytical, very straightforward person, a very direct person because I am like that and because I have to be. See, that’s the thing, in (name of the city) especially, people don’t want to be talked to in a direct way, it’s considered rude [...] You tell me – how am I supposed to do my job like this? 

HCN: [...] they (expats) have no respect to the local habits [...] from what I observed, they were rude to us almost without exception. Those are not the proper behaviors that we expect from expat people

**Relational detachment**

Expatriate: [...] it never does any good to insist on something here and especially complain about it when you don’t get it, so I have just thrown in the towel (metaphor for surrendering; giving up) mentally and emotionally [...] 

HCN: [...] so I snapped. I said to myself, no false promises, no more excuses.
RQ1: what DRBs do expatriates and HCNs enact?
We noted a high degree of intra-group homogeneity of DRBs and, simultaneously, a high degree of intergroup heterogeneity between the expatriate and HCN samples, suggesting the possibility of an empirically grounded typology (Bailey, 1994; Kluge, 2000). Accordingly, we initiated the analysis of this theme by initially classifying the DRBs according to their referenced group. Further, we analyzed the meaningful inter/intra-group relations by isolating intra-group attributes and intergroup differences/relations to identify and interpret emerging regularities in a purposeful manner. Our analysis revealed that the main differential factor between DRBs is the relative position of expatriates and HCNs; in our case, expatriates were in a supervisory role and HCNs were in a subordinate role. We further classified the various behaviors across two dimensions: task/job and personal/social. See Table III for the typology of DRBs.

<table>
<thead>
<tr>
<th>Themes</th>
<th>Representative quotations across categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disruptive relationship behaviors (DRBs)</td>
<td>Expatriate DRBs</td>
</tr>
<tr>
<td></td>
<td>If I want to save my sanity, from now on, this guy (expat) is a necessary evil for me. Nothing more.</td>
</tr>
<tr>
<td></td>
<td>HCN DRBs</td>
</tr>
<tr>
<td>DRB relational outcomes</td>
<td>Expatriate: [...] I am not a bad guy despite locals thinking that of me [...] after everything, she (HCN) had second and third chances but no [...] she had to make her point as if she owns the company [...] I’m sorry but I have to let you go and I will not lose any sleep over it HCN: At first I was thinking – I would never be friends with that kind of person [...] then I started admiring myself to be able to work with such a man [...] After a while, I just switched companies [...] You shouldn’t put up with everything, it’s just not worth it [...]</td>
</tr>
</tbody>
</table>

Table II.

Answers to research questions

<table>
<thead>
<tr>
<th>Types</th>
<th>Expatriate DRBs</th>
<th>HCN DRBs</th>
<th>Shared DRBs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensions</td>
<td>Task</td>
<td>Selective/discriminative (prioritizing expatriates) promotion of employees</td>
<td>Lack of (role) informational support</td>
</tr>
<tr>
<td></td>
<td>Lack of flexibility</td>
<td></td>
<td>Dishonesty</td>
</tr>
<tr>
<td></td>
<td>Performance pressures</td>
<td></td>
<td>Xenophobia</td>
</tr>
<tr>
<td></td>
<td>Personal/social</td>
<td>Superior/demeaning behavior</td>
<td>Selective socialization and communication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Resentment</td>
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<tr>
<td></td>
<td></td>
<td>Dishonesty</td>
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<tr>
<td></td>
<td></td>
<td>Xenophobia</td>
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<tr>
<td></td>
<td></td>
<td>Lack of social, emotional support</td>
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</tr>
</tbody>
</table>

Table III.
Typology of disruptive relationship behaviors
Insofar as the existing literature has mainly accentuated negative relational behaviors (lack of supporting, socializing behaviors) of HCNs toward expatriates, our analysis yielded a significant amount of novelty in terms of expatriate-perpetrated DRBs. Expatriates in our sample had a superior position relative to HCNs, and the DRBs identified for this group related directly to their authority. The task/job dimension of DRBs included various work decisions, demands and/or pressures. In our data, expatriates’ selective and discriminative promotion of fellow expatriates relative to HCNs was identified as the most prominent work decision, and lack of flexibility in executing work tasks and pressures for achievement of a high performance level were the most emphasized work demand/pressure. The personal/social dimension of DRBs entailed inappropriate demeanor toward HCNs stemming from feelings of superiority relative to HCNs. HCNs perceived these behaviors as abusive, describing them in terms such as excessive, irrational, unnecessary, unfair or lacking empathy.

Since HCNs were in a subordinate role to expatriates, the DRBs they displayed related more to their informal duties, perhaps reflecting awareness that deprivation of formal assistance to expatriates would result in formal consequences (e.g. contract termination). Our analysis confirmed the existence of DRBs not only noted in prior research but also showed a wider array of behaviors. Accordingly, informal HCNs’ job/task behaviors toward expatriates entailed the withholding of informational or role support, while the personal/social behaviors included the withholding of social-emotional support. Expatriates described these DRBs as partial and complete lack of provision of information that they deemed helpful in facilitating their work and social life in the host context. In addition, in the personal/social domain of HCNs’ DRBs we found that HCNs also display negative emotionally based behaviors toward expatriates, such as displays of resentment as well as xenophobic and dishonest behavior. Expatriate interviewees perceived these as intentional and relatively open and straightforward provisions of false work and social information and hushed slandering and gossiping about expatriates’ national and cultural origins, habits and visual appearance. We identified only one type of DRB that was shared by expatriates and HCNs, selective (in-group) communication and socialization. Our data revealed that this type of DRB reflects in-group member’s affinity or favoritism for in-group over out-group members (Tajfel, 1970; Zhong et al., 2008), manifested through the cessation of informational exchange and support (communication) and socializing behaviors between the dyadic partners and its restriction to in-group members.

RQ2: what are the antecedents of expatriate and HCN DRBs?

Our analysis not only confirmed the salience of factors put forth in prior studies, but also offered new ones and, as we elaborate in this section, shed new light on their role as antecedents of DRBs. We identified three major themes that include differences between expatriates and HCNs, workplace conflicts and relational detachment.

For the expatriate–HCN differences theme, three subcategories emerged: socio-cultural, organizational and personal. These subcategories reflect contextual and individual-level differences between expatriates and HCNs that are active at the beginning of the relationship, that is, at the beginning of the international assignment. The largest subcategory of differences between HCNs and expatriates is socio-cultural. It reflects colliding attitudes toward general-relational (social) and work-related (professional) aspects of expatriate–HCN relationships that were conditioned by opposing social and cultural contexts from which expatriates and HCNs originate. The social aspects relate to differences in individuals’ expectations regarding the appropriate approach and demeanor when interacting with someone from another culture. We found that expected appropriateness of demeanor lies on the continuum between regard and disregard that reflects the relational actors’ attitude about the level of attention, care and respect the relational partner should display. The professional domain of socio-cultural differences entails differences in work styles and work ethics between HCNs and expatriates. In particular, our analysis indicated that differences in work ethics were
manifested in different levels of work enthusiasm and motivation while differences in work styles were manifested in different degrees of effectiveness in executing work tasks. The organizational subcategory includes differences in perceptions of fairness and appropriateness of organizational contexts in the form of routines, policies, procedures and practices that, in line with prior research, were mostly related to compensation. The personal subcategory comprises differences in HCN–expatriate personality traits and experiences.

The workplace conflicts theme emerged rapidly in our analysis and yielded two subcategories as both expatriates and HCNs were vocal about this particular issue. This is consistent with research that has shown interpersonal conflicts among co-workers to be one of the most frequently noted stressors for employees (Keenan and Newton, 1985; Liu et al., 2007); consequently, interviewees had stored these exchanges in their memory as a salient experience. Identified subcategories in this theme were miscommunication and misbehavior, both of which reflect the specific nature of the conflict experienced.

Our third antecedent theme has to do with emotional (affective) detachment from the relationship; this is driven by the negative emotions of frustration and decreased trust. Both expatriates and HCNs experience frustration intensely as each invests efforts in their jobs and have firm expectations regarding it. This frustration often led to the complete disappearance of mutual trust between expatriates and HCNs. Both groups expressed such detachment from one another as a decrease in contributions to and overall enthusiasm for mutual collaboration.

RQ3: what are the consequences of expatriate and HCN DRBs?

Our data showed that relational DRB consequences represent individual and group levels and center on emotional and task-related (professional) relational aspects. Emotional aspects connote the diminished cohesion between expatriates and HCNs across-cultural dyads and groups. Interpersonal and intergroup cohesion reflect significantly diminished degrees of pleasantness of the relational actor or group as perceived by the relational partner(s) in presence, interaction and behavioral exchanges. Professional aspects connote diminished collaboration quality between expatriates and HCNs in terms of the individual contribution to and (satisfaction with) joint levels of performance and goal achievement. We did not identify any intergroup homogeneity rendering us unable to report or elaborate on links between these subcategories. We were, however, able to identify a link between negative relational outcomes and the breakdown of the relationship between expatriates and HCNs. This breakdown manifested itself in the willingness of both members of the dyad to discard their relationships on both emotional and professional (contract termination) levels.

RQ4: what is the process whereby relationships between expatriates and HCNs breakdown?

As we processed the data from our interviews, it became apparent to us that the relationship between expatriates and HCNs was one of interdependence, with the success of one dependent on the success of the other. Consequently, we decided to draw on interdependence theory (IT) (Thibaut and Kelley, 1959) as a foundation for the development of our conceptual model of the dark side of expatriate–HCN relationships.

**Interdependence theory**

IT is comprehensive and purposely designed to explain close dyadic relationships such as spouses or siblings; it has been refined over its 70 years of existence, even finding limited use in business studies (e.g. negotiations). This relational focus and comprehensiveness separates IT from other theories, such as social exchange and social categorization, which have been used in past expatriate–HCN relational research.

IT (Kelley and Thibaut, 1978) analyzes interdependent structural properties of the dyadic relationship and explains how such properties affect motivation, interaction, adaptation
(interdependence processes) and, subsequently, behavior of dyadic members and desired relational outcomes (Holmes, 2002; Kelley, 1979; Rusbult and Van Lange, 2003). Interdependent structures have several properties that specify the ways in which relational partners are dependent on and influence each other. According to Kelley and Thibaut (1978), these properties include level of dependence (degree to which an individuals' outcomes are influenced by another’s actions), mutuality of dependence (degree to which people are equally dependent), basis of dependence (whether dependence rests on partner control or joint control), co-variation of interests (degree to which partners’ outcomes correspond), temporal structure (temporal unfolding of interactions) and availability of information (about the relational partner).

There are three interdependence processes: motivational transformation, interaction and adaptation. Motivational transformation entails cognition, attribution, evaluation, affect and affordance whereby each person in the dyad cognitively attributes meaning to the relationship and the actions of the relational partner, evaluates it against their relational expectations, judges what responses are afforded or possible and then reacts in a way that serves their desired relational outcomes which can be self-centered (given situation) and other-(relational partner, social)-centered (effective situation) (Kelley and Thibaut, 1978; Kelley et al., 2002). Interaction occurs when situational properties affect the motivational transformation of the relational actors, forming a particular pattern of interaction that, ultimately, through the actor's attempt to adapt toward the desired relational outcomes, produces a particular behavior (Kelley et al., 2002). Adaptation, thus, connotes that interactions yield probabilistic adaptations to adopt particular behaviors entailing actor-specific inclinations to display behavior to specific situations in a specific manner across numerous partners (personal dispositions) and with a specific partner (relationship-specific motives), and social-based inclinations to display behavior in a particular class of situation in a specific manner (social norms).

IT embodies desired outcomes in terms of rewards and costs where rewards are “exchanged resources that are pleasurable and gratifying,” while costs are “exchanged resources that result in a loss or punishment” (Sprecher, 1998, p. 32). According to IT, there are four types of rewards and costs: emotional (positive/negative emotions), instrumental (activities and tasks in the relationship), social (social appearance and the ability to interact in social environments) and opportunity (opportunities that arise in relationships) (Guerrero et al., 2007).

In terms of positive expatriate and HCN relationships, both parties desire positive emotions, smooth-running interplay and efficient efforts to realize their objectives, which then result in their positive social stance and, congruently, new professional and/or social opportunities. The level and mutuality of dependence and co-variation of interests between expatriates and HCNs are high as both dyadic members have joint control of dependence and cannot realize their desires without the contribution of the other. Availability of information is also high as expatriates and HCNs understand their roles and work closely together, thus information about each other and their relational expectations, motives and contributions is close and available. The temporal structure of these relationships is reflected in the international assignment, which binds them together in an ongoing dynamic relationship. Since both expatriates' and HCNs’ desired outcomes are congenial and the interdependent nature of their relationships clear, why then do some expatriates and HCNs fail to develop productive relationships? Using interdependence postulates and our data analysis findings, we provide an answer.

A model of the dark side of expatriate–HCN relationships
Our nomological model of the dark relationship between expatriates and HCNs is shown in Figure 1. Expatriates and HCNs begin their relationship with the onset of the international assignment. Based on adaptation to past relational experiences and/or adopted socio-cultural norms, they each enter the relationship with formed personal dispositions and relationship-specific motives along with expectations of the relationship and the relational partner. Since expatriate's and
HCN’s social-cultural backgrounds, organizational experiences and personal characteristics differ, despite corresponding relational interests and desired outcomes, so do their personal dispositions, relation-specific motives and expectations. These differing dispositions, motives and expectations then condition each member’s behavior in the relationship and their attribution of the meaning of the partner’s behavior (Holmes, 2002), resulting in workplace conflicts. Workplace conflicts negatively interfere with the attainment of desired relational outcomes for expatriates and HCNs by increasing various relational costs. Both expatriates and HCNs manifest emotional costs in the emergence of negative emotions; these are evidenced by the rise of frustration with the relationship and decreased mutual trust. Instrumental costs are visible in hampered work processes and the need to invest more effort in the daily work due to diminished quality of collaboration. Social costs are realized through threat in social status (image, reputation) for both expatriates and HCNs as tensions in relationships disrupt their work effectiveness and impose threats. Opportunity costs are manifested in lesser or no gains (advancements, collaboration/networking) for both expatriates and HCNs as impaired quality of the relationship prevents them from generating and/or exploiting such opportunities.

Since the expatriate–HCN relationship has a high level and mutuality of dependence with corresponding (covariate) outcomes, both parties evaluate their relational outcomes against their expectations of their relationship and the contribution of the partner (Thibaut and Kelley, 1959). Outcomes that are judged as exceeding one’s standard of acceptability (comparison level) elicit high satisfaction with the relationship, whereas outcomes that fall short of one’s comparison level elicit low satisfaction (Drigotas and Rusbult, 1992; Thibaut and Kelley, 1959). Hence, the rise in relational costs and the decrease in relational rewards render expatriates and HCNs to evaluate their relationship negatively or as one not leading to desired outcomes due to the behavior of the partner, upon whom the desired outcomes depend; the result is that both dyadic actors affectively detach from the relationship. Affective detachment then induces negative social categorization, with expatriates and HCNs perceiving each other as out-group members or those that do not contribute to each other’s desired outcomes.

Negative outcome distribution, affective detachment and negative mutual social categorization coalesce to drive expatriates and HCNs to form new self-centered personal dispositions and relationship-specific motives and to transfer their motivation from an effective situation (behavior geared toward assisting relational partner/preserving the relation) to the given situation or immediate self-focused protection of their desired outcomes, reflecting negative motivational transformation (Kelley et al., 2002; Kelley and Thibaut, 1978). Cognitive depletion caused by negative motivational transformation then facilitates the exhibition of
destructive behavior (Finkel and Campbell, 2001). Thus, in order to protect and secure new motives and desired relational outcomes, and based on behavioral affordance, both cross-cultural dyad members engage in DRBs.

As noted earlier, behavioral affordance has a different meaning for expatriates and HCNs in that it relates directly to their formal authorities. Since the expatriates in our sample were hierarchically superior to HCNs, the DRBs identified for this group entailed work decisions/demands and pressures, and inappropriate demeanor in the personal/social dimension, displaying superiority, performance pressures, lack of flexibility and harshness toward HCNs. In contrast, the DRBs displayed by HCNs stem from their informal duties due to their subordinate position relative to expatriates and their congruent awareness that deprivation of formal assistance to expatriates would result in formal consequences. Hence, HCNs displayed dishonesty, resentment, lack of social, emotional and role (information) support to expatriates. In addition, expatriate–HCN’s relational detachment and congruent display of DRBs minimizes or completely eliminates the information availability that could foster learning between the two partners. Congruently, and as confirmed by our data, the enactment of DRBs by expatriates and HCNs further increases workplace conflicts and amplifies the interpersonal dynamics, leading to negative intergroup/dyadic relational consequences. Our data indicate these entail low intergroup integration, collaboration and cohesion, which, due to the high level and mutuality of dependence between expatriates and HCNs, lead to relational breakdown.

Discussion
The purpose of our study was to investigate and determine how and why expatriates and HCNs fail to develop quality relationships with each other. In doing so, we focused on disruptive relational behaviors that expatriates and HCNs exhibit toward each other, the factors preceding them, their consequences and the mechanism through which they occur. Our findings show that multilevel differences between these dyadic members lead to miscommunication and misbehavior-based workplace conflicts that increase relational costs. As a result of these costs, expatriates and HCNs negatively evaluate the relationship and, correspondingly, negatively (out-group) categorize each other, ultimately detaching from the relationship. Relational detachment then leads to the enactment of DRBs that increase workplace conflicts and congruent detachment dynamics, resulting in relational breakdown.

Our findings contribute to theory and the expatriate literature. As far as we know, our study is the only one that has drawn on IT to address relationships in a cross-cultural context. Thus, we extend the theory by assigning it an explanatory role in the realm of international assignments and expatriate–HCN relationships, showing how the interdependent properties of this specific dyad can lead to dysfunctional dynamics that lead to disruptive relational behaviors and the breakdown of the relationship. Although not explicitly addressed in IT, our findings suggest that power differences are instrumental in forming the relationship between superiors and subordinates. These power differences may be exacerbated by the cultural differences inherent in expatriate and HCN relationships.

Transcending beyond the current academic focus on expatriate success, we initiate a conversation about the relationship between expatriates and HCNs that depicts the struggles that cross-cultural dyads experience. By developing a nomological network of the phenomenon, we contribute to an understanding of what, how and why expatriates and HCNs fail to develop quality relationships with each other and the relational consequences of this failure. Hence, we advance knowledge about the contributing factors and the underlying mechanisms of the relational breakdown.

Research limitations and future research
As with all studies our research has limitations. In this section, we detail these and suggest promising modalities of their amendment in future studies. Even though our sample does
have a relatively high degree of demographic diversity and was gathered from culturally
distant sites, we acknowledge it is relatively small, consisting of 17 expatriates and 10 HCNs
working in only two locations. In addition, despite focusing on the relational dyad
between expatriates and their HCN co-workers, we did not interview dyadic members who actually
worked together in the same organization and our expatriate sample included only assigned
expatriates and not other types of global workers. Due to the time and geographic distance
issues, we used a snowball recruiting technique and appealed to both expatriate and HCN
groups to recommend members of the opposite dyad with whom they were engaged in direct
work relationships. Interestingly, none of the interviewees from either group did so. We found
this fact logical, as we acknowledge that the topic of interest in our study is specific and likely
to be uncomfortable, thus precluding the recommendation of close co-workers who would
provide us with information on the dark aspects of their relationships and themselves.

To address these limitations, future studies should entail more dispersed data collection
sites with varying degrees and types (cultural, institutional, administrative and geographic)
of distances. Researchers should incorporate larger and more diverse samples (i.e.
self-initiated expatriates, short-term assignees, foreign assignees and foreign recruits) that
differ in terms of the expatriation motives as well as contexts they operate in, sharing
different power relations (superior vs subordinate) and engaged in a direct professional
relationship (i.e. same organization, department and section) with HCNs. Such efforts could
enrich the abundance, depth and breadth of the experiences reported, enabling more
in-depth investigations and interpretations that could lead to amendments of our model.

Future research could discover new levels and forms of differences between expatriates
and HCNs, a larger plethora of DRBs, and new individual or team level DRB outcomes, in
addition to the dyadic type that we identified. To expand the DRB space, researchers could
look to general organizational behavior studies. For example, Keashly and Jagatic (2003)
identified several types of workplace abuse and mobbing strategies that bear a striking
resemblance with our DRBs. These include changing work tasks and creating barriers to
task completion (lack of flexibility in executing tasks and performance pressure DRBs),
social isolation and exclusion (selective communication DRB), ridicule and insulting remarks
(superior and demeaning behavior DRB), and spreading rumors (resentment DRBs). Hence,
we encourage future research that would investigate these behaviors more deeply to
identify a more exhaustive set of even darker DRBs enacted by expatriates and HCNs.

Data collection and analysis is another aspect of our study that has limitations. While our
qualitative approach aided the development of the nomological network of the dark side of
expatriate–HCN relationships, future studies could employ a mixed approach, using a
triangulation (qualitative, quantitative and experimental) of research methods. The addition
of experimental methods, for example, would enable researchers to neutralize the
Hawthorne effect (Parsons, 1974) and “socially adequate” interviewee responses stemming
out of fear of potentially harmful disclosure, once again contributing to viability and
external validity of findings. In addition, using a combination of complementary research
methods would allow for a more thorough investigation of the causal complexities of the
phenomenon through more accurate extraction and interpretation of emerging regularities
and identification of relationships of necessity or sufficiency between constituting factors
and behavioral outcomes. This could then result in new factorial configurations and causal
dynamics of expatriate and HCN relationships. For example, one area that could benefit
from such amendments is the role of prior negative relational experiences of expatriates and
HCNs. It posits that such experiences shape personal- and relation-specific dispositions and
motives that, as we explained, induce workplace conflicts and contribute to relational
breakdown. Thus, flexible and strategic use of research methods in future research could
yield new insights about if and how past negative relational experiences of expatriates and
HCNs (and/or other new nomological elements) affect the proposed causal dynamics.
In terms of the conceptual limitations, we acknowledge that our model is not necessarily complete. Hence, further examinations that focus more deeply into specific relationships we identified in our model will be necessary. For example, researchers could explore if specific types of power differences between expatriates and HCNs on different levels induce specific types of workplace conflicts. In the same vein, researchers could investigate if different types of workplace conflicts affect the social exchange between expatriates and HCNs in different ways. It is possible that different workplace conflicts could result in different levels of emotional, instrumental, opportunity and social costs for dyadic members and could open the possibility to explore the possible relations between different cost ratios and magnitude, intensity and speed of relational detachment. These examinations could also be applied to the behavioral domain of our model in that researchers could investigate if there is a link between different types of DRBs and different types of consequences.

We also acknowledge that the comprehensiveness of our model, at least to a certain extent, disregards the temporal unfolding of the phenomenon, as time is necessary for both expatriates and HCNs to develop this dark nature of their relationship. Accordingly, the suggested research extensions could result in innovative possibilities whereby organizations could find ways to intervene and inhibit or completely neutralize the development of the dyadic dysfunction detailed in our theoretical model. Thus, future research could aid the effective management of expatriate–HCN differences to prevent conflicts and promote organizational interventions that would inhibit relational detachment.

Conclusion
In this study, we constructed a nomological network of the dark side of expatriate–HCN relationships in which we identified the disruptive relational behaviors expatriates and HCNs engage in during international assignments, their antecedent factors and dyadic consequences, as well as the process whereby disruptive behaviors occur and result in dysfunctional relationships. We drew on IT to explain these dynamics, thus extending its use in cross-cultural settings. Therefore, our findings deliver both theoretical and empirical contributions. As an initial comprehensive effort to detail the dark side of relationships between expatriates and HCNs, we draw attention to the importance of further research that is needed to test, amend, and, ultimately, complete our model.

References


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Further reading


Appendix 1. Interview protocol (expatriates)

(1) Please tell me about your international assignment.

(2) Could you tell me about a time during your expatriation that you felt out of place or uncomfortable in your new surroundings?

(3) Please describe your relationships with your host country national co-workers?

   • In general, what do you like about working with HCNs? What do not you like?
• What are some of the business challenges you have faced working with HCN?
• What are some personal challenges you have faced working with HCN?

(4) So, we all do things we wish we had not done. And from our own experience, we find that being in a foreign environment can sometimes lead us to engage in undesirable behaviors that we would not engage in at home. Think about a time when you felt particularly bad about or even repulsed by something you said or did. Please describe what happened… (probe for when it happened, why did it happen, who was involved, how did you feel, what were the results and whether they know if the expatriate was assigned or self-initiated).

(5) OK, now please take a moment to reflect: how do you think these experiences you have just described have changed you as a person? (probe: positive/negative, attitudes/perspectives, values/beliefs/career/personal, etc.)

(6) If you could start your expatriate experience over, what would you do differently? What outcomes would that change and how?

Appendix 2. Interview protocol (host country nationals)

(1) First, can you provide a brief description of your company, and of your specific roles and responsibilities?
(2) When did you first start working with expatriates?
(3) To what extent has working with expatriate(s) met your expectations?
(4) In what ways has working with expatriate(s) been different than you had expected?
(5) Now that you have been working with expatriates for a while, what are your expectations?
(6) In general, what do you like about working with expatriates? What don’t you like?
(7) What are some of the business challenges you have faced working with expatriates?
(8) What are some personal challenges you have faced working with expatriates?
(9) So, we all do things we wish we had not done. And from our own experience, we find that being in a foreign environment can sometimes lead us to engage in undesirable behaviors that we would not engage in at home. Think about a time when you felt particularly bad about or even repulsed by the actions of an expatriate. Please describe what happened… (probe for when it happened, why did it happen, who was involved, how did you feel, what were the results and whether they know if the expatriate was assigned or self-initiated).

• As these events were unfolding, did you feel as though the expatriate was acting more as a member of (home town/country) or (host town/country), or something else?
• How would most people here in your country view these actions?
(10) OK, now please take a moment to reflect: how do you think these experiences you have just described have changed you as a person? (probe: positive/negative, attitudes/perspectives, values/beliefs/career/personal, etc.)

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Highway to Hell? Managing expatriates in crisis

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Abstract

Purpose – The purpose of this paper is to develop a conceptual framework of severe expatriate crises focusing on the occurrence of “fit-dependent” crisis events, which is when the crisis is “man made” and triggered by expatriates’ maladjustment or acculturation stress in the host country. The authors focus on the causes, prevention and management of fit-dependent expatriate crises.

Design/methodology/approach – The authors develop a conceptual framework of fit-dependent expatriate crises that involves different levels of analysis.

Findings – The conceptual framework shows that crises can be triggered at micro, meso and macro levels ranging from the personal and family domains (micro), to the network and organisational domains (meso) as well as the host country domain (macro). The authors conceptualise these “domains of causes” as triggering maladjustment and acculturation stress that ultimately leads to a severe crisis event with correspondingly serious and potentially life-changing consequences. Furthermore, using a process perspective, the authors outline strategies for preventing and managing crises before, during and after the crisis occurs, discussing the support roles of various internal (organisational) and external (specialist) stakeholders.

Originality/value – Studying the link between expatriation and crises is a highly relevant research endeavour because severe crisis events will impact on HRM policies, processes and procedures for dealing with employees living abroad, and will create additional challenges for HRM beyond what could normally be expected. Using attribution theory to explain why organisational support and intervention to assist expatriates during a crisis is not always forthcoming, and theories of social networks to elucidate the “first responder” roles of various support actors, the authors contribute to the expatriate literature by opening up the field to a better understanding of the dark side of expatriation that includes crisis definition, prevention, management and solutions.

Keywords Crisis, Alcohol, Expatriate, HRM role, Stakeholders, Expatriation, Abuse, Law enforcement

Paper type Conceptual paper

Introduction

A crisis is an undesirable event causing changes that will affect one or more individuals negatively (Lerbinger, 2012). While crises can occur anywhere and hit anyone, people in a vulnerable situation are more likely to experience crises, and crises will often have a greater and more severe impact on such persons (Vigh, 2008). Expatriates have often been described as being particularly vulnerable, with little knowledge of local customs and frequently experiencing acculturation stress, with only a small local support network to assist them (Bader and Berg, 2013; Lauring and Selmer, 2010; McNulty, 2015). By “expatriates”, we mean people who are assigned by organisations to occupy senior or upper middle rank positions in the international subsidiaries of their organisation as highly paid experts (McNulty and Brewster, 2019). High-status expatriates may also include some self-initiated expatriates (SIEs)
who apply for a job as a senior specialist or even CEO in a country other than their own, or who have been “headhunted” into such a role. This paper seeks to shine a light on the “dark side” of expatriation by examining crises that arise from expatriates’ deliberate actions when living abroad, which then results in serious and severe consequences for them and their families.

Building on person-environment fit theory, we label the type of crisis that we deal with as “fit-dependent” expatriate crises (cf. Fee et al., 2019; Fee et al., 2013). Person-environment fit can be defined as a particular type of person-context interaction that involves the match between an individual’s values, behaviour and knowledge and environmental dimensions on and off the job (Chuang et al., 2015; Makkonen, 2015). A poor fit with the foreign country environment has been found to result in stress, dissatisfaction and low commitment (Nolan and Morley, 2014). We argue that this may, in turn, trigger situations in which more serious crisis events occur. We extend typical crisis studies that have suggested working abroad is itself a stressor leading to a variety of negative outcomes (Takeuchi, 2010) such as impaired physical and mental well-being (van der Zee et al., 2005; Valk, 2003), “culture shock” (Oberg, 1951) and work-family conflict (Baker and Ciuk, 2015), and which has been focused mainly on stressors from the local environment that could hinder the job effort. Instead, we examine expatriate crises as a more radical event than “maladjustment”, where lack of adjustment and the consequent stress act as triggers for serious crisis events, with correspondingly severe (but avoidable) consequences such as death, injury, physical/mental illness, divorce, forced job resignation, being fired, legal conviction and imprisonment, deportation and/or bankruptcy and destitution.

Fit-dependent expatriate crises are unpredictable, yet potentially avoidable; we view them as seriously negative events that happen to expatriates. These events are at least partly caused by expatriates’ more or less deliberate (man made) actions or neglect while being employed abroad, but is triggered by deep levels of maladjustment or acculturation stress (cf. Turner and Pidgeon, 1997). We focus on fit-dependent crises because compared to literature on, for example, disaster-related crises, it is an area that has been dealt with very scantly. Additionally, as these crises are avoidable, there are greater opportunities to prevent them compared to where crises are derived from entirely uncontrollable events in the surroundings.

Studying the link between expatriation and crises is a highly relevant research endeavour because it will impact on HRM policies, processes and procedures for dealing with employees living abroad, and will create additional challenges for the HR manager beyond what could normally be expected. An increasing number of researchers and consultants have begun to address the topic of crisis more broadly (e.g. Bader and Berg, 2014; Gannon and Paraskevas, forthcoming; McNulty, 2015), including from an HRM perspective (Bader et al., 2015) and most particularly through a duty of care lens (Berry Appleman and Leiden, 2017). We contribute to the research by developing a conceptual framework of fit-dependent expatriate crises that involves different levels of analysis; more broadly, crises are triggered at micro-, meso- and macro-levels ranging from the personal and family domains (micro), to the network and organisational domains (meso) and finally the host country domain (macro). We conceptualise these “domains of influence” as triggering maladjustment and acculturation stress that ultimately leads to a severe crisis event with correspondingly serious and potentially life-changing consequences.

As we will show, research in this area is warranted and a conceptual structure is an appropriate first step. Doing so opens up the field to a better understanding of the dark side of expatriation and the potential role of relevant domains in causing crisis events as well as various stakeholders who can engage in crisis prevention, management and solutions. We acknowledge that our conceptual model rests on a highly exploratory foundation due to the scarcity of literature. Yet, based on a recent media search on fit-dependent crises as well as clusters of literature that supports our ideas more broadly (which we explain in subsequent sections), we show how our conceptual framework can be a starting point for future studies in this emerging, if not urgent, area of expatriate research.
The paper begins by developing a definition of fit-dependent expatriate crises from related literatures on crisis and disaster management. To build our framework, we then outline five domains from which such crises can unfold and discuss interrelationships between them. Next, we introduce sources of support, namely within the organisation, within the network, and from external specialists, as central actors to assist the expatriate before, during and after the crisis occurs. Finally, we discuss implications of the proposed model and how future research may deal with the issues raised in this paper.

**Defining fit-dependent expatriate crises**

To begin building our framework, we first provide an initial overview of definitions of crisis from prior research, from which we subsequently develop a definition of fit-dependent expatriate crises as our core construct.

At the individual level, Vigh (2008, p. 5) defines a crisis “as an isolated period of time in which our lives are shattered”, resulting in “the loss of balance and the inability to control the exterior forces influencing our possibilities and choices”. At the organisational level, Lerbinger (2012) suggests there are eight characteristics that constitute a crisis event, including it being sudden, unexpected and unwanted; being high impact and low probability; being ambiguous regarding cause, effect and resolution; interrupting normal operations; hindering goals and threatening survival; requiring fast decision making; causing problems if no action is taken; and creating significant psychological stress. Critically, a crisis is viewed as a temporary state from which an individual or organisation will eventually reclaim a state of balance and calm. Depending on the nature of the crisis, this may occur in a relatively short time-frame (episodic) or take much longer to resolve and recover from (chronic) (Pidgeon and O’Leary, 2000). Thus, crises have been positioned as arising from an external event (or “trigger”), which is unplanned, is complex to understand and resolve, and which requires a short or long period of recovery.

Crisis have further been defined by location. For example, there are workplace threats such as chemical spills, industrial accidents and aircraft crashes (Claus, 2011), and non-work-related threats like illness, road accidents and medical emergencies (Druckman et al., 2012). Similarly, there are regional threats such as pandemics (SARS, MERS; Tan and Enderwick, 2006) and natural disasters such as landslides, earthquakes and tsunamis (Schneid and Collins, 2001; Merlot and De Cieri, 2011) that can result in infectious disease, homelessness or life-threatening illness (Dagan et al., 2011). There may be worldwide economic events such as the global financial crisis of 2008–2009 that results in increased job loss (Metz et al., 2012); and there are unavoidable external risks in “hostile environments” such as unprovoked or random assault, kidnapping, hijacking, robbery and terrorism (Henisz et al., 2010; Bader and Berg, 2013). Key to these definitions is that the crisis is in some way “accidental” and caused by external events in particular locations over which people have little or no control.

Extending these definitions to the context of expatriation, a core concept of the definition of fit-dependent expatriate crises is agency, which ignores (for the time being) issues of location (e.g. work vs non-work or one region vs another, aspects we come back to later). Unlike the crisis definitions above, fit-dependent expatriate crises are not “accidents” but involve deliberate human action, the consequences of which are severe human suffering or loss that could have been avoided. Examples include arrest and imprisonment, deportation and crime.

To explain how severe crisis events might occur for expatriates, we position them as arising primarily from acculturation stress or behavioural maladjustment, including contextual or cultural lack of knowledge, ignorance and incompetence as well as inappropriate emotional reactions caused by acculturation stress (cf. Fee et al., 2013; Fee et al., 2019; Turner and Pidgeon, 1997; Nolan and Morley, 2014; Wurtz, 2018). In our model,
which is depicted in Figure 1, acculturation stress and/or behavioural maladjustment are outcomes arising from triggers in the “domains of causes”. By excluding other variants of typical crisis triggers, such as natural and environmental disasters, medical emergencies, “accidents”, and terrorism (cf. Bader and Berg, 2014; Bader and Schuster, 2015; Fee et al., 2013), we do not suggest they are less important or any less impactful for the expatriate, but that our focus is on severe crises that can potentially be avoided through better management of expatriate adjustment and acculturation (whether by organisations or the expatriates themselves). In our case, expatriates’ survivability and ability to cope with psychological stress in a host location are key considerations, particularly as they have fewer resources at their disposal when living abroad. Departing from Pidgeon and O’Leary (2000), we further argue that the focus on fit-dependent expatriate crises is relevant from a practical point of view, as an understanding of these severe crisis events provides possibilities for organisational actors to prevent future similar crises from occurring.

Our definition and subsequent model of fit-dependent expatriate crises is informed by several contexts. First, we conducted an exploratory analysis of crisis events among expatriates using secondary data (see Warren, 2019 for a similar approach) of recent media in Singapore, using online outlets (e.g. Facebook, Expat Living Magazine, Instagram, AsiaOne) and newspaper articles from The Straits Times, Singapore’s national daily newspaper, published over a five-year period (2013–2018). From this, we identified comprehensive examples of the nature and seriousness of the types of crises expatriates might face. We chose Singapore because it hosts a typically large population of high-status expatriates (Ministry of Manpower, 2017). Of the 103 articles we reviewed, some reported non-preventable crises such as cancer diagnoses and accidental traffic deaths (n = 18), but the majority involved avoidable expatriate crises (n = 85). In nearly half of these cases, the crisis situation was severe enough to warrant arrest, imprisonment and caning (n = 41), with more than 90 per cent of cases (n = 78) deemed to be potentially “life-changing”. Our preliminary analysis of the 85 avoidable crisis media articles enabled us to begin identifying and categorising the types of avoidable crises expatriates might face (see Appendix for examples), noting that more serious criminal offences were far likelier to be reported in the press than “personal interest” stories about (for example) accidental drowning, which greatly facilitated our research efforts. Our analysis also included identifying the severe consequences that arise for expatriates from crisis events, the potential contributing factors that trigger crises and the various stakeholders that play a role in supporting and resolving them.
In our next step, and using our preliminary findings, we then conducted an extensive review of crisis studies to assist in further conceptualising the nature of fit-dependent crises. From our review, we identified fit-dependent expatriate crises as constituting four key elements: knowledge-dependent threats arising from expatriates’ cultural ignorance or personal incompetence (Fee et al., 2013), meaning that, being highly educated, expatriates should have known better; predictable surprises that could have been avoided (Bazerman and Watkins, 2004); moral flexibility or the belief by expatriates that morality is relative and not absolute (Lu et al., 2017), in other words that the “rules do not apply to them”; and unthinkable events, meaning that the crisis has occurred in the “inconceivable context” of expatriation (Lagadec, 2007, p. 489), which often contributes to the severity of the consequences.

In a third step, we conceptualised serious expatriate crisis events in the context of several important changes to expatriation over the past two decades (McNulty and Selmer, 2017). First, the shift to self-initiated expatriation has severed important headquarters (home country) organisational ties for some expatriates meaning that traditional avenues of crisis prevention and support are no longer available to them. Second, the increase in self-initiated expatriation means that people are employed abroad for longer (and undefined) periods of time than a typical three-year assignment, which, while making them more experienced, also means they are exposed to more crisis stressors than a “traditional” expatriate might experience. Recent research shows that contemporary expatriation is a very different experience than traditional notions about living abroad in the 1980s and 1990s (see McNulty and Brewster, 2017 for a critique). Changes in the international labour market as well as changes in expatriates’ conditions of employment have resulted in duty of care “first responder” obligations shifting away from organisations onto employees. We elaborate on these elements in subsequent sections using attribution and social network theories.

Our understanding of crises enables us to begin to define fit-dependent expatriate crises as involving deliberate human action arising from acculturation stress, cultural ignorance or personal incompetence. Next, we discuss its causes, from which we further extend our definition.

**Domains of causes of fit-dependent expatriate crises**

In continuing to build our framework, we consider next the potential causes of severe expatriate crises. Here, we conceptualise the forces that potentially lead expatriates into avoidable crisis situations at three levels: micro, macro and meso dimensions. We contend there are five domains that can contribute to causing fit-dependent expatriate crises, namely the personal, family, network, organisational and host country domains. We illustrate these domains in Figure 2 and discuss each in turn in this section, noting interrelationships among them. We further elaborate on the domains of causes by providing examples of actual crisis situations and events in the Appendix.

In Figure 2, we conceptualise the “domains of causes” as contributing to or triggering outcomes such as maladjustment and acculturation stress, which then results in an expatriate crisis. We note, however, that it is not always clear which came first – whether maladjustment and acculturation stress exacerbates a domain of cause or whether one or more of these domains triggers maladjustment and acculturation stress. We conclude nonetheless that an expatriate crisis situation is preceded in most instances by a deep level of stress, which in a foreign environment (and based on our secondary data) is most often expressed as maladjustment and lack of acculturation. For this reason, we position “outcomes” as preceding the crisis and eventuating from the domains of causes, noting that the combination of causes and outcomes combine to produce the crisis.

**The personal domain**

For most individuals, expatriation is a challenging experience. Usually, when being relocated, employees experience adjustment difficulties and subsequent acculturation stress.
While maladjustment can lead to a misfit between personal behaviour and the environment, acculturation stress at the micro level can result in inappropriate emotional reactions (Lauring and Selmer, 2010; McNulty, 2015; Bader and Berg, 2013). Under certain circumstances, this can lead to conditions that eventually develop into a crisis. On the personal level, such situations can be caused by insufficient understanding of the local surroundings (e.g. laws that govern public behaviour), moral relativity due to being away from home and improper coping mechanisms to deal with the experienced stress.

In relation to expatriate adjustment, it is common for expatriates to have a deficient understanding of norms and customs in the host environment (Kubovcikova, 2016; Jonasson et al., 2017), at least for a while. An individual’s belief about what is acceptable in one location may not be transferable to another; for example, there may be differences in how people of the opposite gender or certain categories of workers (e.g. those offering a service to the public) need to be treated. Misunderstandings may result in expatriates’ beliefs about norms in some locations (e.g. the public consumption of alcohol) giving rise to legal violations in other locations that have vastly different norms or even colonial-era laws (Walsh, 2007). Even if not intentional, expatriates may not be sufficiently informed about the specific host country situation (e.g. intolerance of LGBT people; McPhail and McNulty, 2015) and may find themselves responsible for causing a crisis situation due to ignorance.

Moral relativity (changes in belief as to what is right and wrong; Greppin et al., 2017) can occur when expatriates are distanced from their home context. As such, it has been argued that individual behaviour, i.e. in relation to ethics and morality, can change when one is immersed in a foreign location (McNulty, 2015). Lu et al. (2017) found that the frequency of relocations (breadth) rather than the length of stay in any one location (depth) was a positive
predictor of immoral behaviour. Studies (e.g. Lu et al., 2017; Wurtz, 2018) have thus concluded that it is not whether the host country is more or less moral than one’s home country that matters (e.g. corruption, crime), but the number of foreign experiences one is exposed to. It suggests that when expatriates engage in frequent relocations abroad, they are more likely to experience moral relativism arising from “appreciating the differences in moral beliefs upheld by different cultures” (p. 13). Moral relativity, then, can lead to a severe crisis event to the extent that the expatriate violates norms either from the home country that may still be reinforced in the family (e.g. adultery, domestic abuse) but which are unacceptable or illegal in the host location (e.g. spousal rape or assault), or by violating laws in the host country of which they are not aware, such as assaulting public servants (taxi drivers, security guards) or accepting bribes to conduct business dealings (cf. Sarpong et al., 2019).

Improper coping mechanisms during stressful situations can also be a serious problem. Maladjustment has been found to be linked to symptom-focused coping strategies, where individuals attempt to minimise anxieties through physical or mental withdrawal from the situation or by avoiding the problem (Selmer and Leung, 2007). Substance abuse, especially alcohol, can be a destructive coping mechanism among male expatriates in particular (Wurtz, 2018), far exceeding its purpose as a mechanism to “blow off steam” on a night out drinking with colleagues (Ames et al., 2007). Although research shows there is no single risk factor that is dominant for alcohol abuse (Schmidt et al., 2010), a person’s “vulnerability” is a leading cause, meaning that the more vulnerabilities that are present (disease, mental health issues, stress), the more likely a person is to develop alcohol problems, including social (family) and socio-economic (job loss) problems and injury to others (Shi and Stevens, 2005). Improper coping mechanisms among individuals facing increased levels of stress, such as expatriates, may eventually lead to actions that can trigger a severe crisis.

Each of these micro dimensions of the personal domain will often interact with each other. For example, stress can cause improper coping mechanisms, such as alcohol abuse, that may in turn affect moral decision making. A vicious circle of events in the personal domain can thus develop, each reinforcing the other and resulting in a severe but avoidable crisis. Moreover, crises that arise due to personal ignorance and incompetence, and subsequent dysfunctional emotional reactions and responses, can crossover, for example, to crises in the organisation and the local environment. However, the domain where personal factors have the greatest impact is the family.

The family domain
Another micro domain that is central to expatriate well-being is the accompanying family (Shaffer and Harrison, 1998). Here, it has been shown that inter-individual transmissions of emotional states take place between closely related persons (Takeuchi et al., 2002; Carlson et al., 2019). We argue that crisis events can result from the family domain if the expatriate experiences household dysfunctionality, a change in partner/relationship dynamics or family isolation from familiar support networks. These dimensions in the family domain are often inter-related; family dysfunctionality is not helped, for example, by expatriates being cut off from immediate contact with friends and relatives back home that can provide support and guidance.

With regard to family dysfunctionality, we know that there are risk factors in terms of increased relationship stress with partners and children (Shaffer and Harrison, 1998; McNulty, 2012), dual-career issues and loss of employment for the trailing spouse (Cole, 2011; McNulty and Moeller, 2018) and overall cross-cultural family stress in the host location (Berry, 1997; Lazarova et al., 2010). Hence, the family needs to be a robust social unit in order to deal with stressors in the expatriate context. If the family is not functioning well, this can lead to situations that can eventually become a crisis (e.g. domestic violence, addiction or substance abuse; cf. Westbrook, 2008).
In relation to changes in partner/relationship dynamics, expatriation sometimes involves that not all family members can retain the labour market status that they enjoyed in the home country. Dependency by a trailing spouse upon, for example, a breadwinner expatriate spouse can exacerbate stress levels as "everything is riding on one person" in terms of their income and work status and in turn the residency status of the entire family. Moreover, being unemployed in the host country can create a frustrating dual-career issue for a trailing spouse and, in turn, transfer the crisis to the expatriate "couple" (cf. Lauring and Selmer, 2010; McNulty and Moeller, 2018).

Family isolation from familiar support networks is a further contributing cause of expatriate crises. McNulty (2015) found that the absence of strong, male family role models in the host location for expatriate husbands was suggested by their (ex-)wives to be a contributing factor in expatriate divorce. Other research suggests that family stress among expatriates is likely to be exacerbated by the addition of frequent international business travel for the breadwinner (expatriate) spouse (common practice in cities such as Hong Kong and Singapore; Mäkelä et al., 2017), thus giving rise to intermittent partner syndrome (Morrice et al., 1985), a work-induced separation that creates psychological strain resulting in anxiety and depression among family members, particularly left-at-home partners. Again, psychological strain for the trailing spouse or children can, in turn, transfer stress and/or feelings of a crisis to the expatriate.

Problems such as isolation may be dealt with in a constructive manner if the family is well-functioning. However, in a dysfunctional family unit, the isolation of family members can develop into insurmountable maladjustment difficulties that trigger a more severe crisis. Crises unfolding in the family domain, however, may also affect an expatriate's work life and thus the organisational domain, as expatriates that are dissatisfied with the situation of their family tend to bring such negative emotions to the workplace, where it could cause further problems (Wurtz, 2018). Correspondingly, and at the same time, the expatriate will be embedded in a networked community of other expatriates (the expatriate "bubble") upon which he or she is likely to draw support to assist them and their family members to acculturate to the host country. The network domain while intending to be helpful may, however, further add to family dysfunction. We discuss these two domains next.

The network domain

While expatriates frequently seek acculturation support at the meso level from the organisation, the informality and ease of access to the network domain of other expatriates, also at the meso level, is often the preferred option (e.g. families, clubs and associations; Chiu et al., 2009). Referred to as the expatriate "bubble" (Beaverstock, 2011; Walsh, 2007), the network domain helps expatriates to preserve their unique home-country customs and autonomy by "retreating into their social cultural enclaves" (Levy, 2015, p. 77), to maintain a continual attachment to the comfort and familiarity of "home" (Butcher, 2010). Adapting from theories of social networks (e.g. Lazarsfeld and Merton, 1954), Bader and Schuster (2015) emphasise that social networks are important sources of emotional and instrumental support for expatriates.

Crisis events can nonetheless arise from the network domain because bubbles are typically segregated communities that remain distinct and separate from the local population, where the people within it are no longer experiencing a "normal world" (Fechter, 2007, p. 47). Walsh's (2007, p. 507) exposé of single British expatriates in Dubai revealed a seedy lifestyle of frequent sexual encounters rendered permissible within the context of "transnationalism as a holiday-like space". It is well known that expatriates who frequently relocate tend to gravitate towards "bubble" communities as it facilitates their adjustment and integration into the host society more quickly. But such deliberate exclusion from the host environment can result in a lack of familiarity with its customs, habits, traditions and
laws (regardless of moral beliefs), which can blindside unaware individuals and result in significant personal harm.

We surmise that part of the problem may be the domain network itself – a “bubble” that is out of touch and too far removed from the reality of the society in which it exists. Additionally, the network domain is a vulnerable system with fewer participants having expert knowledge, and with participants that are often transient in nature (i.e. expatriates leaving the system due to relocation).

**The organisational domain**

At the meso level, life in the new (host country) organisation can be stressful for expatriates. Work adjustment is a well-known stressor (Aryee and Stone, 1996; Black, 1988), as too is the recent shift to the localisation of employment (and reduction in expatriate salary benefits) arising from self-initiated expatriation (McNulty and Brewster, 2019). These changes can add to expatriate crises in several ways.

First, there may be conflict with host country nationals (HCNs) in the subsidiary organisation. Workplace conflict is the extent to which one individual feels obstructed or irritated by others on the job (Lauring et al., 2017). Research in the domain of close relationships clearly shows that interpersonal conflict has negative consequences for mental and physical well-being that could cause the individual to act improperly (De Dreu and Weingart, 2003). In international environments, there is often more conflict due to misunderstandings and mismatches in norms and expectations (McPherson et al., 2001) and there may be resentment arising from compensation disparity between expatriates and HCNs (Leung et al., 2009) or the perception that expatriates (especially assigned expatriates or AEs) receive “special treatment” (Varma et al., 2011). Expatriates may be excluded from informal networks and decision making due to their cultural and linguistic differences or because of their affiliation with a parent company. Hence, the expatriate can feel isolated and excluded from other organisational members, with negative consequences for his or her well-being (Aycan 1997; Hailey 1996). Linked to conflict are often feelings of injustice (Mikula and Wenzel, 2000), which can potentially impact upon expatriate performance. Such stress could crossover into other domains such as the family (Shafer and Harrison, 1998).

The recently introduced practice of localising expatriates can also contribute to stress and exacerbate potential crisis situations. Localisation applies especially to SIEs, meaning that salary benefits typically afforded to AEs are reduced or removed altogether, thus requiring the SIE (and their family members) to integrate into local society – and to live like locals – to alleviate their cost of living expenses that are no longer funded by the company. McNulty and Brewster (2019) argue that when organisations introduce localisation practices, the transition for expatriates may not be stress-free or simple; localisation removes any possibility of repatriation “back home” or home-country headquarters (HQ) assistance or intervention during a personal hardship. Thus, the duty of care obligation shifts to local (host country) HRM support, which may not be capable of, interested in, handling matters related to employees’ foreigner status. Localised expatriates are situated somewhere between those in the “bubble” and those who go-native, but without full ownership to either; instead, they form a separate community of expatriates defined by semi-permanent residence but without home-country organisational support.

Localisation means that AEs and SIEs will experience expatriate stress and any subsequent crisis differently: at the meso level, AEs are likely to rely heavily on HQ (home-country) HRM support in a “first responder” capacity for legal and practical assistance, whereas SIEs will typically rely on non-HQ HRM support in the form of local (host country) lawyers and embassies. While such support for SIEs may be helpful in the short-term, over the long-term it is likely to be inadequate because local support actors are usually not versed in the intricacies of foreigner issues. For example, if a crisis requires lengthy court proceedings that restricts an
expatriate from leaving the jurisdiction and/or the crisis is compounded by economic distress arising from being fired (because the crisis event brings unwanted reputational harm to the organisation; Forstenlechner, 2010), it can escalate into a chronic crisis situation (see examples in McNulty’s (2015) study of expatriate divorce).

The host country domain
While conflict at micro and meso levels can affect expatriates’ maladjustment and stress and thereby contribute to causing crises, so too can conflict at the macro level in the host country where they are working. The legal, religious and economic development of the host country plays an important role in explaining crisis events, for example, through discriminatory behaviour and practices targeted at expatriates or from location-specific “temptations” that play on expatriates’ moral relativity.

With regard to discrimination, some expatriate destinations may generally be averse to the presence of foreigners thereby potentially strengthening the likelihood of crisis situations (cf. Bader et al., 2018). Forstenlechner (2010), for example, has shown how discrimination at the host country level may lead the expatriate to be, in their own opinion, more easily the prosecuted or targeted party, for example, in road accidents. We see similar incidents in the examples given in the Appendix.

Temptation can also be an important factor. There are “honey” destinations that can very easily result in an avoidable crisis: Thailand, China, Vietnam and much of Africa are examples of destinations where the poverty of local women makes expatriate men very attractive. This may result in increased domestic conflict or even divorce (McNulty, 2015). Easier access in some host country locations to drugs, alcohol, pornography or sexual services could also lead to undesired actions that might not have taken place in the home country (Walsh, 2007). Temptations in the local context may interact with moral relativity leading to situations that could be the onset for a crisis in relation to, for example, a conviction.

Having outlined the five domains (causes) of serious man-made expatriate crises, we further develop our definition of fit-dependent expatriate crises: as involving deliberate human action arising from acculturation stress, cultural ignorance or personal incompetence; that is exacerbated in part or in whole by an individual’s personal, family, network, organisational and/or host country domain(s); the consequences of which are serious, severe, irreversible, long-term (chronic) and potentially life-changing; but which could have been avoided.

Taking departure in the five domains of causes for fit-dependent expatriate crises, we next discuss potential supportive sources and actors: and the respective solutions they can provide, to assist expatriates before, during and after a crisis situation.

Domains of support for fit-dependent expatriate crises
We conceptualise sources of support for fit-dependent expatriate crises at three levels: within the organisation, within the network, and from external specialists. We further conceptualise when support is provided across three stages: pre-, during and post-crisis. These are depicted in Figure 3 and Table I.

Support from within the organisation
Research has for a long time shown that high-quality organisational support is beneficial to expatriates and their families and has positive crossover effects back to the organisation in terms of improved individual well-being and performance (Shaffer and Harrison, 1998; Takeuchi et al., 2002). Within organisations, primary support needs to be centred around crisis prevention, the expatriates’ safety and health during the crisis, and the support needed to restore safety and/or health at an appropriate juncture (Fee et al., 2013).
There are many studies that focus on the importance of organisational pre-expatriation cross-cultural and language training (Littrell et al., 2006) and, where necessary, providing evacuation briefings for employees entering dangerous locations, including well-designed procedures for acute crisis support and potential repatriation in the event of kidnapping or illness (Bader and Schuster, 2015; Lockwood et al., 2014). These pre-crisis prevention measures typically entail “one-off” training sessions or briefings, usually given before the expatriate has left their home country, and with little follow up post-arrival.

Research on man-made disasters (e.g. Turner and Pidgeon, 1997) nonetheless suggests that an incubation period typically exists prior to the onset of a crisis, where small undetected errors can build up over time through misunderstanding and miscommunication of risks. We contend that failure by expatriates and/or their organisation to recognise the escalation of small but important acts of cultural ignorance or incompetence post-arrival may be a relevant explanatory factor in subsequent crises that arise. Compounding the risk is that the accumulation of undetected errors over time is often prevalent in more vulnerable systems (Pidgeon and O’Leary, 2000), such as expatriation. Thus, while we have argued a crisis may be fit-dependent at the micro level, maladjustment errors may also relate to vulnerabilities at the meso level (in the organisational system).

The importance of the organisation in the pre-crisis period means that central organisational members such as the HRM department and the expatriate’s supervisor need to be particularly sensitive for early signs of maladjustment. This can include domains outside the organisation such as in one’s personal life, family unit or host country setting.
Therefore, risk management policies may be necessary to address fit-dependent risks other than only financial and environmental risks within the organisation. It would ideally include detecting problems with expatriates’ adjustment (including their family members) and capacity to cope with stress post-arrival and to address it in collaboration with, for example,

<table>
<thead>
<tr>
<th>Actors</th>
<th>Responsibilities and/or support</th>
<th>Stage of crisis</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Within the organisation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HRM/Supervisor/Colleagues</td>
<td>Monitor and reduce stressors for expatriates</td>
<td>Pre</td>
</tr>
<tr>
<td>HRM</td>
<td>Watch for potential development of crisis “incubation period”</td>
<td>Pre</td>
</tr>
<tr>
<td></td>
<td>Comply with host country laws including duty of care obligations;</td>
<td></td>
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<tr>
<td></td>
<td>enforce company policies and procedures (may result in job loss)</td>
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<tr>
<td></td>
<td>Provide professional referrals (e.g. lawyer, counsellor); (partially) fund legal costs;</td>
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<tr>
<td></td>
<td>repatriate family members; liaise with Embassy</td>
<td></td>
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<tr>
<td>Supervisor</td>
<td>Manage relationships with external stakeholders in host country;</td>
<td>During</td>
</tr>
<tr>
<td></td>
<td>manage relationships with internal stakeholders in home country</td>
<td></td>
</tr>
<tr>
<td>Colleagues</td>
<td>Mitigate geographical isolation from family support back home (emotional)</td>
<td>During</td>
</tr>
<tr>
<td>HRM</td>
<td>Facilitate organisational learning/knowledge to prevent and handle crises in future</td>
<td>Post</td>
</tr>
<tr>
<td><strong>Within the network</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Host country family/Expatriate friends/Clubs/Associations/Online media</td>
<td>Monitor and reduce stressors for expatriates</td>
<td>Pre</td>
</tr>
<tr>
<td></td>
<td>Watch for potential development of crisis “incubation period”</td>
<td>Pre</td>
</tr>
<tr>
<td></td>
<td>Provide professional referrals (e.g. lawyer, counsellor)</td>
<td>During</td>
</tr>
<tr>
<td>International school</td>
<td>Provide counselling support for children</td>
<td>During</td>
</tr>
<tr>
<td>Expatriate friends</td>
<td>Give emotional support (a listening ear)</td>
<td>During</td>
</tr>
<tr>
<td></td>
<td>Offer practical support to family members (housing, meals)</td>
<td>During</td>
</tr>
<tr>
<td><strong>From external specialists</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical professional</td>
<td>Provide mental health support for individual and/or family members</td>
<td>Pre</td>
</tr>
<tr>
<td>Counsellor</td>
<td>Provide emotional support to individual and/or family members</td>
<td>Pre</td>
</tr>
<tr>
<td>Religious institution</td>
<td>Provide faith-based emotional and practical support to individual and family members</td>
<td>Pre</td>
</tr>
<tr>
<td>Law enforcement</td>
<td>Facilitate immediate communication with relevant Embassy about an individual’s arrest or situation</td>
<td>Pre</td>
</tr>
<tr>
<td></td>
<td>arrest individual to prevent further offending/escalation of unlawful behaviour; conduct thorough</td>
<td></td>
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<tr>
<td></td>
<td>investigation of situation that led to arrest or crisis event</td>
<td>During</td>
</tr>
<tr>
<td>Embassy</td>
<td>Liaise with relevant local authorities to ensure individual’s physical and psychological well-being;</td>
<td>During</td>
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<tr>
<td></td>
<td>facilitate communication with family members in host and home country; provide emergency travel</td>
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<td></td>
<td>documents; advise on transfer of funds from home country; offer referral services for lawyers,</td>
<td></td>
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<td></td>
<td>interpreters, doctors and funeral directors</td>
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<tr>
<td>Lawyer</td>
<td>Inform individual of their legal rights/how legal process works, including timelines; prepare</td>
<td>During</td>
</tr>
<tr>
<td></td>
<td>individual for court proceedings; advise on post-crisis implications regarding work pass/immigration</td>
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<tr>
<td></td>
<td>status of individual and family members; manage local media</td>
<td></td>
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<tr>
<td>Medical professional</td>
<td>Provide mental health support for individual and/or family members; liaise with relevant local</td>
<td>During</td>
</tr>
<tr>
<td>Counsellor</td>
<td>authorities and lawyer as required</td>
<td></td>
</tr>
<tr>
<td>Social worker</td>
<td>Provide practical support to individual and/or family members (interim housing, meals, child</td>
<td>During</td>
</tr>
<tr>
<td></td>
<td>custody/visitation</td>
<td></td>
</tr>
<tr>
<td>Religious institution</td>
<td>Provide faith-based emotional and practical support to individual and family members</td>
<td>During</td>
</tr>
</tbody>
</table>

**Table I.** Domains of support for fit-dependent expatriate crises
the social network and/or external specialists (e.g. well-being programmes, work–life balance initiatives, coaching).

During the crisis period, organisations have an important internal role to play. Close colleagues, HRM personnel and supervisors can provide emotional support and function as coordinators of relevant external specialists linked to the organisation that could be needed (e.g. legal advisors, immigration specialists, counsellors and medical professionals). Doing so can also help expatriates to get on with their life post-crisis.

During the crisis, it is also important to clarify the extent and implications of the crisis for the expatriate (will they be fired?) as well as the organisation (what is the reputational damage to the firm arising from the crisis?). Decisions relating to either may be explained by attribution theory, which holds that people will make judgments about the causes of events and intervene according to their belief that the event was or was not controllable (or avoidable) by the people involved (Weiner et al., 1987; Kelley and Michela, 1980). Especially needed is to develop and properly communicate an action plan of how to deal with crisis “fall out”. Organisations might need to be directly involved in providing support to others drawn into the crisis zone as “peripheral victims” (e.g. family members and work colleagues) who will hold ties to the affected person and may require long-term legal assistance and/or psychological counselling.

After the crisis event, the organisation has a critical post-crisis role in learning from the situation in order to prevent such incidents in the future or to handle them better should they arise again (Fee et al., 2013). Building a network of external infrastructure support and activating external actors early in the crisis should be key areas of focus. Nonetheless, little attention has been paid as to how organisations might build such infrastructure.

Support from within the network
Researchers emphasise the role of social networks during expatriation, broadly defined as the web of social relationships that surrounds individuals and is a finite set of actors connected by one or more specific types of ties (Bader and Schuster, 2015; Chiu et al., 2009). We argue that the network can provide both emotional and instrumental support to expatriates in crisis. This is typically from the immediate network of family members and friends in the host country, including social networks in the expatriate community, and to a much lesser extent family members back home (Mahajan and Toh, 2014; Bader et al., 2015). It may also include various information sources (e.g. social media or chat groups) or expatriate clubs (Beaverstock, 2011).

In the pre-crisis phase, the network (especially family members) has an important role in being sensitive to indicators of a developing crisis situation. This could, for example, be increased stress reactions such as insomnia or aggressiveness, alcohol abuse or signs of moral relativity (excessive use of pornography or extra-marital affairs). Alleviating sources of stress or seeking help for chronic stressors are key.

The network can also be highly supportive during the crisis functioning in a similar way as the organisation by coordinating external specialists gleaned from expatriate community networks and providing emotional support. The extent of support required may be exacerbated by crises that involve the family (cf. Bader et al., 2015). We caution that support from immediate family members in the host country is unlikely to be an effective source of support given they will be in the “crisis zone” (see Figure 3) as peripheral victims with their own crisis to deal with (e.g. the threat of forced repatriation for themselves and any children in the event of criminal conviction of their spouse). Thus, there may be an extraordinary need for support from external specialists being experts in handling some specific aspects of the crisis event related only to the spouse and children (e.g. divorce, domestic violence).
Support from external specialists

External stakeholders that can assist expatriates during a crisis include (among others) law enforcement, embassies, lawyers, medical professionals, counsellors, social workers and religious institutions, which may help the organisation and expatriates to gain more knowledge of the crisis situation and how best to handle it (Waxin, 2004; Eriksson et al., 2009; Fee et al., 2019). This group of actors can also perform treatments of a medical or psychological nature in order to bring the expatriate back to a balanced situation (cf. Stone et al., 2003; Tedeschi et al., 1998). Some of the external specialists may handle formal bureaucratic or legal processes in the host or home country to assist the expatriate to solve the problems that are causing the crisis, while others might provide meals and accommodation in the event of job loss. We argue that the external stakeholders’ expertise in certain areas such as medical or legal disciplines makes them a central support source which neither the social network nor the organisation can fully replace.

Furthermore, as our illustrative examples in the Appendix have shown, there may be times when the organisation does not provide support in fit-dependent crisis situations. On the one hand, the organisation may withdraw support due to its protection of the company’s reputation or where the cause or centre of crisis is the family thereby excluding itself as a primary support mechanism. Alternatively, SIEs (as compared to AEs) will not be able to rely on HQ HRM support or even host country HRM support given they are employed as locals. As suggested earlier, in such situations the expatriate may have no alternative but to seek and pay for support themselves from external experts. Very little research has, however, been conducted on this theme, and we therefore propose that it is an important area of future studies of serious fit-dependent expatriate crises.

Discussion

In this paper, we have argued that avoidable and man-made crises are a specific area of “dark side” themes in expatriate literature in need of more attention. We have, in particular, focused on the fit-dependent types of crisis where the expatriate bears part of the responsibility for its development due to maladjustment and/or subsequent acculturation stress. Such a crisis can develop in a number of overlapping domains; for example, the personal, family, network, organisational and host country domains. Often, more than one domain is involved such that problems grow into a much larger crisis. This also means that more stakeholders in the organisation and the network may be needed to monitor the situation to prevent the unfolding of a crisis situation or to de-escalate a crisis after it has occurred. We illustrate our conceptualisation in Figure 1.

Many times, a negative situation only becomes a crisis when support systems are vulnerable and fail to provide preventive measures or immediate interventions. Whether a crisis is relatively short-term or takes much longer to resolve and recover from is likely to be exacerbated by several inter-related crisis components.

First, the extent to which expatriates have access to, and familiarity with, appropriate external specialists will determine how well they are able to avoid or deal with a crisis. It includes (lack of) local know-how and experience concerning law and the legal process, medical systems including insurance, social welfare support structures, psychological support and host country laws that determine their freedom of movement to return home. Here, the organisation and the network have critical roles to play; during and after the crisis, their roles should centre on emotional support and contacting/coordinating external specialists that can help the expatriate regain his/her balance. These specialists are important especially when long-term treatment, counselling and advice is needed to ease, eradicate or deal with problems caused by the crisis.

Second, and related to the first, is the nature of the employment relationship between the expatriate and the organisation as a result of the crisis and, as a result, what then happens to
any duty of care obligation the organisation may have had. If an expatriate loses their job as a result of the crisis event, organisational duty of care may cease and shift instead to external specialists in the home and host country. Similarly, if the expatriate is localised or employed as an SIE, duty of care obligations may automatically reside with non-organisational host country specialists. The point we make is that vulnerability in the employment relationship can exacerbate even a simple crisis (as shown in the Appendix).

Implications for theory
Looking through media accounts of expatriate crises in Singapore (Appendix), we see examples of situations where one or more potential support systems available to expatriates failed to prevent or alleviate a fit-dependent crisis; some actors (e.g. organisations) made the situation worse by firing the employee. Our point is that, while support and intervention are often available, the willingness to help when the individual is partly responsible for the misfortune is not always forthcoming. When man-made crises occur, the organisation’s reluctance to assist can be explained by attribution theory in terms of the extent of help it is willing to offer as determined by who caused the crisis – the employee or the organisation. However, one has to acknowledge that expatriates are vulnerable in the foreign context, even among those that are paid handsome ‘hardship allowances’ because of the difficulties they are likely to encounter. Hence, although they may be partly responsible for triggering the crisis themselves, they are also in a situation where adjustment difficulties and the subsequent stress put a great deal of pressure on them. We see this mismatch between the need to handle an expatriate crisis and the willingness to intervene by the organisation as an important theme to be taken up in future research; specifically, how attribution theory moderates sources of support made available to expatriates during a crisis situation, and what can be done to overcome reluctance to help among (potential) supportive actors.

Related to the above is a need to more fully understand the functional importance of the network domain during expatriation more broadly as well as during a crisis. Studies of expatriates experiencing a terrorist threat shows that social support in the network domain can be crucial for their well-being and performance (Bader and Schuster, 2015). While the network domain has inherent vulnerabilities in relation to expatriate crisis detection or crisis management (i.e. lack of expertise, transience), it is likely to be increasingly relied upon to provide support to expatriates in more contemporary forms of employment (i.e. as SIEs or expatriate entrepreneurs), where the expectation of organisational support is reduced or severed. Theories of social networks can be helpful in understanding how to strengthen the network domain.

Implications for practice
Severe crisis events will impact on HRM policies, processes and procedures for dealing with employees living abroad, and will create additional challenges for HRM beyond what could normally be expected. A major challenge for organisations is to overcome deficiencies in duty of care obligations that do not currently extend beyond being responsive only to unavoidable crises such as natural disasters and workplace accidents. BAL (2017) advises that an employer’s duty of care towards employees is now a legal requirement in terms of workplace standards and safety; in many jurisdictions (Australia, New Zealand, Spain, France) it is extended to employees working abroad, and even foreigners employed locally (e.g. in Canada). Duty of care implies that employers take reasonable steps to protect employees from foreseeable risks in the course of their work, including preventing or mitigating harm. “Work” can include any location where an employee is assigned to complete it. What is “reasonable” is obviously open to wide interpretation, however, ignorance on the basis of not knowing, it never being a problem in the past or it not being foreseeable are an inadequate defence under the law. Changes in the employment relationship for some expatriates (e.g. SIEs, locally-hired foreigners, expatriate gig workers) that has reduced or severed organisational support in the
event of a crisis obviously increases the risk of organisational non-compliance related to duty of care obligations for expatriates. If the organisation is to be replaced as a primary support mechanism for expatriates in crisis, is the network domain a reliable substitute? Moreover, where does legal responsibility for duty of care reside if organisations are increasingly being sued for failure to provide it?

Limitations and conclusion

As with all research, our study has some limitations. There is a scarcity of literature related to serious expatriate crises with the exception of only a few studies related to terrorism (Bader and Berg, 2013, 2014; Bader et al., 2015; Bader and Schuster, 2015), expatriate divorce (McNulty, 2015), hostile environments (Dickmann and Watson, 2017; Faeth and Kittler, 2017) and alcohol abuse (Wurtz, 2018). While a large body of literature about crises exists in other fields (e.g. medicine, aid work, disaster relief), there is almost no inter-disciplinary link to expatriate studies. As a result, our model is highly exploratory being based on a preliminary media search within a large-city context, as well as experiences from our own research on fit-dependent crisis events. On this basis, we argue that there is a need for examining this area further, particularly as our model is heavily context dependent since it was developed with Singapore in mind; a small location in, say, China, where the expatriate is single/unaccompanied and there are no other expatriates, let alone countrymen of the expatriate, will require different domains of support, some of which will not be available in the host country.

Additionally, while our use of secondary data is justifiable on several grounds (see Sarpong et al., 2019), it does not fully account for internal or external (personal) factors that may precipitate a crisis, hence we are unable to establish clear links between a variety of risk factors and the actual crisis event. Moreover, the reason for a crisis (e.g. arrest, imprisonment) may not represent the true cause of the crisis itself, suggesting that causes of fit-dependent expatriate crises are likely to be complex and to accumulate over time (both before and during the time abroad), which we incorporate into our model.

As a starting point, our model of fit-dependent expatriate crises, its domains of causes, and sources of support provides an overview of the phenomenon from which further research can be expanded. By conceptualising and depicting a model of causes for and support of fit-dependent expatriate crises, we aim to establish a foundation for future empirical research within an area of the “dark side” of expatriation. We find this theme to have great personal and organisational impact.

Note

1. Singapore’s Ministry of Manpower (2017) estimated that 42 per cent of its population are non-residents, being legally entitled to reside and/or work there, of which high paid expatriates (employment pass holders) represent 12 per cent. The number of high-status expatriates is higher when taking into account ‘permanent residents,’ of which there are approximately half a million.

References


Kubovcikova, A. (2016), “Going through the motions: testing the measurement perspective, dimensionality and internal consistency of the three-dimensional adjustment scale”, *Journal of Global Mobility*, Vol. 4 No. 2, pp. 149-175.


**Corresponding author**

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(The Appendix follows overleaf.)
<table>
<thead>
<tr>
<th>Crisis situation</th>
<th>Crisis outcome</th>
<th>Source</th>
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<tbody>
<tr>
<td><strong>Personal domain</strong></td>
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<tr>
<td>A male German CEO in Singapore physically assaulted a taxi driver that refused to offer his service because the expatriate was drunk. The expatriate was charged, convicted and jailed. In a similar case, a female Taiwanese broker, who assaulted a taxi driver while intoxicated and then a security guard who tried to intervene, was later sentenced to three weeks jail. There are many similar cases.</td>
<td>Lawful conviction and imprisonment, Job loss</td>
<td>(The Straits Times) CEO gets jail for slapping cabby</td>
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<td>An expatriate CEO and father of three sons went on trial in 2018 on charges of child sexual assault for molesting his youngest son’s nine-year-old classmate at a 2015 Halloween sleepover at his home in Singapore. The CEO was sentenced to 14 years’ jail and 24 strokes of the cane in August 2018. During sentencing, further charges were raised of sexual assault of an eight-year-old child in 2011, in Singapore, under similar circumstances. The man’s wife and three children have subsequently relocated back to their home country.</td>
<td>Lawful conviction, imprisonment, caning, Forced repatriation of family members</td>
<td>(The Straits Times) Law don who beat up cabby gets 4 months’ jail</td>
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<td>A high-level academic from the Lee Kuan Yew School of Public Policy at National University of Singapore had his permanent residency cancelled after being identified as “an agent of influence of a foreign country” who worked with intelligence organisations and agents from that country to influence Singapore’s foreign policy. He and his wife, both US citizens, have been permanently banned from Singapore. A naturalised Singaporean, originally from Malé, had his citizenship taken away for his involvement in a global match-fixing syndicate constituting criminal conduct. Upon appeal, his citizenship was reinstated with stringent conditions to not reoffend.</td>
<td>Permanent residency revoked, Fired from job, Deportation, Citizenship revoked, Statelessness</td>
<td>(The Straits Times) LKY School professor Huang Jing banned, has PR cancelled, for being agent of influence for foreign country</td>
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<td>A self-employed Australian expatriate was sentenced to 11 months’ jail and 3 strokes of the cane for molesting (inappropriately touching) two women in separate bar incidents.</td>
<td>Lawful conviction, imprisonment, caning</td>
<td>(The Straits Times) Man losing citizenship was part of match-fixing ring</td>
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<td><strong>Family domain</strong></td>
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<td>In 2015, a Belgian expatriate smothered and killed his five-year-old son at his apartment in the midst of a divorce and custody battle with his estranged French wife, who had wanted full custody of the child in order to relocate back to France. The father, who had become distressed and tired of the legal proceedings, decided to</td>
<td>Death of child (homicide), Divorce, Lawful</td>
<td>(The Straits Times) Belgian gets 5 years’ jail for killing son</td>
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(continued)
smother his son before committing suicide. The suicide attempt failed and the expatriate is now serving a five-year prison sentence on reduced charges of culpable homicide arising from a “depressive disorder” which the judge concluded “substantially impaired his judgment” at the time of the incident. The mother, who has since relocated back to France where she buried their son, claimed that killing their child was intended “to hurt me as much as possible”.

A spate of expatriate divorce cases in Singapore resulted in several crises for dependent spouses (mothers), including: first, forced repatriation and abandonment of their children due to cancellation of their residency permit by the children’s father and/or, second, restricted freedom of movement to return to their home country due to enforcement of Hague Convention laws.

Unlike in countries from which many expatriates originate, assault of a public transport worker in Singapore frequently entails a “deterrent” jail sentence and/or a heavy fine under the Protection from Harassment Act. Yet, the sheer number of cases we observed over a short period of time suggests that nearly all expatriates are unaware of Singapore’s laws until they find themselves in the unenviable position of being charged with a crime punishable by prison, fine and/or caning, often over little more than a $20 taxi fare. The process of arrest, being charged, convicted and then jailed can take more than 12 months to reach its conclusion.

A British expatriate banker in Singapore faced a personal crisis in 2014 after posting several disrespectful and insulting remarks about Singaporeans on social media. His mocking of “poor people” taking public transportation and calling a taxi driver a “retard” led to death threats after unknown individuals, in retaliation, posted his home address online. His organisation reacted by firing the expatriate and the situation resulted in him and his family fleeing the country for Australia. In a similar situation, an Indian bank employee was fired and given a stern police warning after posting an image of a ripped Singapore flag on social media.

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### Crisis situation

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### Network domain

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<td>A New Zealand company director was fined $2500 for causing hurt to a local</td>
<td>Conviction and fine</td>
<td>(The Straits Times) Man fined $2500 for hurting another in McDonald’s</td>
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<td>Singaporean he had bumped into outside a McDonald’s. Witnesses testified that</td>
<td></td>
<td>21 December 2017, B5</td>
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<td>the expatriate “showed no remorse immediately after the incident and flaunted his wealth to the victim, saying he was able to hire a lawyer”. Further, he had said this with an arrogant tone”</td>
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<td><strong>Organisation domain</strong></td>
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<td>A French MD, who was jailed for 3 weeks after causing hurt to another expatriate in a bar, was made redundant from his job as a result of his conviction, despite his lawyer pleading for leniency for an incident that was “completely out of character and not premeditated”. The case took 9 months to resolve from arrest to jail. During this time, his passport would have been impounded, but with no job, he would likely have faced financial difficulties without being able to leave the jurisdiction. He has subsequently relocated to Hong Kong in self-employment. There are countless cases of the same nature where organisations fire an employee upon them being charged (but not yet convicted) of a crime that may result in either minimal jail time or only a fine</td>
<td>Conviction, fine Job loss Loss of residency</td>
<td>(The Straits Times) Ex-MD jailed for smashing glass against man’s head 11 August 2017, B6 (The Straits Times) Briton given four weeks’ jail for assault 19 May 2018, B6</td>
</tr>
<tr>
<td><strong>Host country domain</strong></td>
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<td>A 39-year old Australian expatriate in Singapore punched a local female jazz singer after she had made provocative, insulting and racist comments to him. While the expatriate made no excuse for his actions, he was convicted of causing hurt, fined $3000, and lost his job two days after he was arrested because he now had a “tarnished image due to the comments made by the victim on various blog sites”. His case, like others, took more than 12 months to be resolved</td>
<td>Conviction, fine Job loss</td>
<td>(The Straits Times) Man fined $3k for punching jazz singer 26 March 2015, B5 (The Straits Times) $4k fine for manager who punched cabby after vomiting in taxi 17 April 2018, B6</td>
</tr>
<tr>
<td>A Norwegian expatriate in Singapore was wrongly accused and convicted of</td>
<td>Falsely accused of a crime Job loss</td>
<td>(The Straits Times) Man jailed for “brutish” attack on taxi driver 12 April 2015, A8</td>
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<tr>
<td>assaulting a taxi driver after a heavy night of drinking. While it eventually became known eight-months after the incident that the taxi driver had provoked the assault for which the expatriate fought back to defend himself, the Norwegian was nonetheless fired from his high-paying job, estranged from his wife, now lived abroad, and had served five-weeks of a 10-week prison sentence, before a retrial found him guilty of a lesser charge requiring no additional prison time. The judge conducting the retrial concluded there was discrimination involved, in which the foreigner was targeted to take the blame because he was drunk</td>
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Congruence of economic mobility beliefs and immigrants' self-esteem

Laura Guerrero
Department of Management, University of Houston – Clear Lake, Houston, Texas, USA, and
Luciana Turchick Hakak
School of Business, University of the Fraser Valley, Abbotsford, Canada

Abstract

Purpose – A dark side of global mobility is that many immigrants have negative work outcomes. Studies have analyzed the antecedents to poor work outcomes from the immigrants’ point of view or from that of host country nationals. The purpose of this paper is to propose a relational model, which applies terror management theory to address how the economic mobility beliefs of immigrants and host country nationals interact and how these different combinations of beliefs affect the self-esteem of immigrants.

Design/methodology/approach – This theoretical model considers the impact of the social interactions between immigrants and host country nationals when immigrants’ mortality is salient.

Findings – In hostile environments that make immigrants’ mortality salient, lack of confirmation of immigrants’ beliefs about economic mobility from host country nationals can lead to a decrease in immigrants’ self-esteem and therefore to negative work outcomes.

Practical implications – As the number of immigrants grows, so do concerns about their ability to contribute to the economy. Lack of confirmation of their beliefs in a context in which their mortality is salient, is likely to lead to lower self-esteem and perhaps other negative outcomes.

Originality/value – This paper is the first, to the authors’ knowledge, to use terror management theory to advance our understanding of the outcome of a lack of confirmation from host country nationals of immigrants’ beliefs on economic mobility under conditions of mortality salience.

Keywords Beliefs, Meritocracy, Theory, Self-esteem, Immigrants, Terror management

Paper type Conceptual paper

The number of immigrants around the world is growing. In 1960, there were approximately 77 million immigrants, representing 2.6 percent of the world population (United Nations – Population Division, 2013). By 2017, that number has grown to over 257 million or 3.4 percent of the world population (United Nations – Population Division, 2017). As economic and political stability continues to suffer in several countries, and as people often migrate when they are dissatisfied with their overall quality of life and socioeconomic well-being, these numbers are expected to grow.

However, although immigrants hope to improve several aspects of their lives by immigrating, there is also a dark side to immigration and global mobility. Problems with global mobility may include the likelihood of moving to a country with high levels of crime or terrorism (Bader and Berg, 2014; Bader and Schuster, 2015) or facing higher levels of stress that may impact one’s marriage or family (McNulty, 2015). Specifically for immigrants, there are concerns regarding their ability to integrate into the labor force and to contribute to their own well-being and that of their host country. In addition, the current climate of anti-globalism and suspicions toward “outsiders” may present immigrants with even greater barriers to integration. As a result, immigrants often face negative work-related experiences such as prejudice and discrimination (e.g. Al Ariss et al., 2013; Esses et al., 2006), difficulties adjusting
to the new culture (e.g. Berry, 1997; Bhagat and London, 1999), being overworked (e.g. Avery et al., 2010), and being underemployed (Guerrero and Rothstein, 2012; Turchick-Hakak, 2014).

Previous research has also shown that immigrants often have worse work outcomes than non-immigrants with similar skills and credentials (Fang et al., 2009; Reitz, 2005; Reitz et al., 2014). For instance, immigrants generally have lower earnings than non-immigrants with comparable levels of education and work experience (e.g. Baker and Benjamin, 1994; Kossoudji, 1989). This finding shows that foreign-acquired skills – this paper uses the word skills to also include education and work experience – are discounted or considered to be less valuable than domestically acquired skills (Esses et al., 2006). This discounting of skills can cause angst and frustration to immigrants (Turchick-Hakak, 2014; Zikic et al., 2010).

Previous studies have analyzed the factors leading to poor work outcomes for immigrants in several ways. While some studies have focused on the perceptions of immigrants regarding their experiences and the factors that resulted in lower work outcomes (e.g. Turchick-Hakak et al., 2010; Zikic et al., 2010), others have focused on the perspective of host country nationals toward immigrants (e.g. O’ferrmann et al., 2014).

However, there is a growing belief that such issues are multi-factorial and researchers should not analyze individual perspectives in isolation. Instead, because individual and inter-personal factors affect one another in determining the perceptions and experiences of immigrants, researchers should consider them jointly, such as through a relational perspective (Turchick-Hakak and Al Ariss, 2013). Relational models are becoming increasingly important in the fields of diversity, management, and intercultural relations, where individuals’ experiences are directly impacted by the interaction between diverse perspectives (Al Ariss and Syed, 2011; Jasinskaja-Lahti et al., 2003; Maisonneuve and Testé, 2007; Phinney et al., 2001; Syed and Ozbilgin, 2009; Turchick-Hakak and Al Ariss, 2013). Our relational model explicitly considers the interconnected nature of an individual’s beliefs, perceptions, and contexts, and considers them as inseparable components of the immigrant experience.

One of the fundamental aspects of the immigrant experience that remains under-researched by management scholars is the realization – both by immigrants and by host country nationals – that the other party carries different beliefs and worldviews. This realization can be perceived as enriching by either party or as deeply threatening to one’s identity, as it pushes individuals to question what they see as absolute truths about themselves and possibilities for their future. Management research has not yet addressed how the beliefs of immigrants and host country nationals interact, and how these different combinations of beliefs affect immigrants’ self-esteem. In particular, we are interested in beliefs regarding economic mobility – understood here as how individuals believe they can increase their income and/or wealth.

In this paper, we apply terror management theory to create a relational model that explains the impact of the immigrants’ realization that there may be profound differences between their beliefs and those of host country nationals. Terror management theory explains that when made aware of their own mortality, individuals nurture beliefs that provide a sense of order to the world. Further, the theory stipulates that when these beliefs are put into question, this creates a great deal of anxiety (Greenberg et al., 1997; Greenberg and Arndt, 2011). Given that our current global political context is one in which sentiments of anti-globalism and the rejection of immigrants is heightened, immigrants may perceive that the beliefs of host country nationals not only threaten their future integration and work-related outcomes, but also their physical well-being and survival. In this case, immigrants may experience a heightened awareness of their own mortality, in addition to potentially perceiving that host country nationals are questioning their fundamental beliefs. Therefore, this theory is well suited to help explain the impact of the perception that the beliefs of host country nationals are opposed to one’s own, in the context of a heightened awareness of death.
Thus, this paper contributes to the fields of global mobility and management by offering a relational model that explains how the economic mobility beliefs of immigrants and those of host country nationals interact and how they affect immigrants’ self-esteem. In doing so, it contributes to our understanding of how different cognitive states of immigrants and host country nationals influence immigrant outcomes. Self-esteem is particularly important to consider because it is known to affect several relevant work outcomes, such as job performance and job satisfaction, as well as one’s overall sense of well-being (Judge and Bono, 2001). Further, because it is relational, this model enables a greater understanding of the interconnected nature of an individual’s beliefs, perceptions and their contexts (Al Ariss and Syed, 2011) and considers them as inseparable components of immigrants’ experiences.

**Literature review**
Considering the characteristics of immigrants or their preferences in isolation is inadequate if we want to understand how the context they face in different countries impacts their well-being and self-esteem. However, few studies to-date have simultaneously considered the perceptions, attitudes or behaviors of both immigrants and host country nationals. Notable exceptions include studies influenced by Berry’s (1997) acculturation model, which have shown that preferences of host country nationals and government policies on immigration have a noteworthy impact on immigrants. Using Berry’s (1997) model, Jasinskaja-Lahti et al. (2003) studied the acculturation preferences of immigrants in relation to the preferences for immigrants’ acculturation expressed by host country nationals in Finland, Germany and Israel. They found that immigrants who preferred different acculturation strategies than the host country nationals experienced more discrimination and stress than other immigrants. Maisonneuve and Testé (2007) also studied the preferences for acculturation of immigrants in relation to the preferences of French country nationals and tested whether certain acculturation styles affected the perception of immigrants as warm or competent. Both adoption of the host culture and conservation of the original culture were related to the warmth dimension, but only adoption was related to the competence dimension. Both these studies showed the impact of the interaction between two groups of people and perceptions by either immigrants (discrimination and stress) or host country nationals (warmth and competence).

Phinney et al. (2001) also developed a relational model considering ethnic identity, national identity, acculturation preferences and immigration policies. Immigration policies refer to government preferences for assimilation, integration or multiculturalism, and they are likely to impact the well-being of immigrants. Finally, Turchick-Hakak and Al Ariss (2013) developed a relational model relating the national/societal context to employment discrimination, the extent to which different types of social networks are valued, and the preferred types of individual acculturation of immigrants. The model also related social networks to discrimination, discrimination to acculturation and networks to acculturation. In this model, these factors are seen as interrelated and the authors explain that examining them in isolation does not give us a complete picture of what immigrants experience.

**Terror management theory**
The relational model in this paper is framed using Terror management theory. Terror management theory states that humans’ awareness of their own mortality leads to a great deal of anxiety (Greenberg et al., 1997; Greenberg and Arndt, 2011). In order to cope with this anxiety, individuals nurture beliefs or worldviews that give them a sense that their lives are enduring and meaningful (Greenberg and Arndt, 2011). These beliefs also attribute order, predictability, and meaning to the universe (Greenberg et al., 1997). These worldviews have
been found to act as protective mechanisms against the anxiety generated by thoughts about death (Greenberg and Arndt, 2011). Although the worldview itself can provide comfort to the individual, the validity of the worldview is put into question if others do not share this belief or worldview (Greenberg et al., 1997). Thus, when members of the community share the same worldviews, individuals feel a sense of comfort because their worldviews are confirmed. However, if individuals become aware that these beliefs are not universally held or they meet others who do not share their beliefs, they may become anxious or upset. The mere possibility that theirs is not the only way to conceive the world can be psychologically unsettling (Greenberg et al., 1997).

Studies have found that reminders about death stimulate the need to strengthen one's worldviews and to increase one's self-esteem (Greenberg and Arndt, 2011; Greenberg et al., 1997). When individuals are reminded about death, they will feel upset and threatened when they realize that not everyone shares their worldviews (Greenberg et al., 1997). Having to reconsider one's worldview will have a negative impact on one's self-esteem because it requires the consideration that one may have been wrong about how things work and that one may be more vulnerable to attitudes of others and to other aspects of context than one previously thought (Greenberg et al., 1997). In addition, the theory states that self-esteem acts as a buffer to anxiety, but that self-esteem is also impacted by anxiety (Harmon-Jones et al., 1997; Pyszczynski et al., 1999). Being exposed to a conflicting worldview causes anxiety, and it affects self-esteem negatively (Weise et al., 2012).

Terror management theory differs from worldview verification theory because the latter refers to the lack of verification of an individual's beliefs by outcomes or facts (Major et al., 2007). In contrast, terror management theory is about the lack of confirmation of one's beliefs by other individuals, and it occurs specifically in situations where individuals perceive that their life is threatened (Greenberg et al., 1997).

To-date, terror management theory has not been applied to many management studies, exceptions include articles about organizational change (Bailey and Raelin, 2015), anxiety and job performance (De Clercq et al., 2017) and decision making (Fox et al., 2010). However, in today's global climate, immigrants may be more aware of their own mortality because of people or politicians showing anti-globalist or anti-immigrant attitudes or policies. Other events such as facing extreme economic needs, hunger, and fear may also make mortality salient for immigrants. In addition, the experience of migrating often involves culture shock, which consists of facing values, beliefs and assumptions that contradict one's own, often in hostile environments. Thus, this theory is particularly well suited to explain the phenomenon addressed in this paper.

Using terror management theory, we propose a model examining how the interplay of worldviews of immigrants and host country nationals affects immigrants' self-esteem. Terror management theory defines self-esteem as the extent to which individuals believe they are living up to the standards set by their worldview (Harmon-Jones et al., 1997).

**Economic mobility beliefs**

Beliefs, also known as worldviews, are defined as “humanly constructed symbolic conceptions of reality that imbues life with order, permanence, and stability; a set of standards through which individuals can attain a sense of personal value.” (Pyszczynski et al., 1999, p. 836). Because a worldview gives one's reality a sense of order and stability, it can be unsettling to meet individuals with different or opposing worldviews (Greenberg et al., 1997). For instance, when individuals hold the worldview that meritocracy explains how wealth and income are distributed, they may feel threatened when they meet others that do not share this belief of how the world works. Worldviews and beliefs are somewhat different. Worldviews may include a series of related beliefs, but in this paper, the words are used as synonyms.
A related but different concept is that of values. Rokeach (1973) defined values as the “enduring belief(s) that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence.” (p. 5). Although values can refer to what is socially preferable, individuals often focus on what they value, and people often know that others may not have the same values. For instance, a person who values true friendship may know that other people do not value it as much or at all. People holding true friendship as a value are not likely to be threatened when they find out that others do not have this value. Thus, worldviews explain how the individuals believe the world works whereas values show a preferred way of living. Thus, under conditions of mortality salience knowing that others have different worldviews is seen as threatening, but knowing that others have different values is not.

Culture may influence worldviews and beliefs, but beliefs are also influenced by personal experiences and observations of the experiences of others (Bandura, 1977). The institutional settings that one has encountered also influence one’s beliefs. For instance, a multinational study found that a belief in work centrality was weaker in individuals who lived in countries that had socialism, strong unions or social inequality (Parboteeah and Cullen, 2003).

This paper focuses on economic mobility worldviews or beliefs. The focus on this type of beliefs is because many immigrants relocate with the goal of improving their economic outcomes. When discussing economic mobility beliefs of host country nationals, we refer to mainstream or widely held beliefs. Although there will be differences in terms of how strongly a belief is held by different individuals in a country or how commonly held it is, the focus is on what many people in the host country believe. The purpose of this paper is not to determine which economic mobility beliefs are correct in predicting work outcomes or to determine the extent to which the belief is held. Rather, its purpose is to explain the consequences to the self-esteem of immigrants who hold certain beliefs, particularly when faced with individuals who do not hold the same beliefs when mortality is salient.

This paper considers three core economic mobility beliefs or worldviews that both immigrants and host country nationals may hold: the belief that fate determines outcomes; the belief that social structures are rigid and that there is very limited economic mobility; and the belief in pure meritocracy. One can conceive of these beliefs as being on a spectrum. Although these are not the only three beliefs one can hold about economic mobility, these three that range from an extreme belief that one cannot control one’s outcomes (fatalism) to the extreme belief that one can control them (meritocracy). Belief in rigid social structures suggests a middle point in which one’s economic outcomes are influenced by one’s social status, which may be difficult, but not impossible to change. Figure 1 shows these beliefs in order of how much control over outcomes individuals think they have.

One economic mobility belief is fatalism. Fatalism is the belief that a person’s destiny is beyond his or her control (Cuéllar et al., 1995). The belief in fatalism is more common among Latin Americans than among individuals of other nationalities (Cuéllar et al., 1995). According to terror management theory, a shared belief in fatalism reduces anxiety by providing meaning, predictability and order (Greenberg et al., 1997). Fatalism explains how the world works. Fatalism also reduces anxiety because there is no need to worry excessively about outcomes that are not under one’s control.

Another economic mobility belief in the rigidity of social structures. This is the belief that some people belong at the top and others in lower positions in the socioeconomic structure. The term social structures refers to social class, which includes power, prestige and wealth. According to this belief, social structures are relatively fixed and self-perpetuating across generations (Bourdieu, 1984). Besides the belief that these
structures are rigid, individuals – especially those in higher social classes – may believe that those in higher levels of the social structure are more refined and cultured than those in the lower social classes (Gray and Kish-Gephart, 2013). Terror management theory predicts that the shared belief in the rigidity of social structures reduces anxiety (Greenberg et al., 1997). Believing in the rigidity of social structures can be comforting to those in higher social classes because they may feel their status is unlikely to be threatened. It may also be comforting to those in lower social classes, because it makes the distribution of rewards and wealth seem predictable.

Finally, meritocracy is the belief that wealth and other goods are distributed appropriately based on how much the recipients deserve them (Major et al., 2007; Pratto et al., 1994). Societies differ in the extent to which people believe in meritocracy. The belief in meritocracy is more dominant in North America and Western Europe than in other regions (Major et al., 2007; Wilson, 1996). In the poverty literature in sociology, this is known as individualistic beliefs and those with individualistic beliefs hold the poor responsible for their situation because of their lack of effort, ability or even morals (Gray and Kish-Gephart, 2013; Wilson, 1996). When individuals in the host country believe in meritocracy – that “you get what you deserve and you deserve what you get” – they will attribute poor work outcomes of immigrants to their lack of ability and skills, poor motivation or inadequate behaviors (Major et al., 2007). There are several advantages to believing in meritocracy. Meritocracy beliefs make individuals feel less vulnerable to unfair treatment (Wiley et al., 2012) and these meritocracy beliefs act as protective mechanisms against the potentially hurtful experience of being treated unfairly or discriminated against (Foster et al., 2006; Major et al., 2002). Terror management theory would also treat the shared belief in meritocracy as a protective mechanism, not necessarily against discriminatory or unfair treatment, but as a way to reduce uncertainty and anxiety. Meritocracy can be very comforting because it offers hope that one may be able to control one’s economic outcomes by working harder (Gray and Kish-Gephart, 2013).

An understanding of all three economic mobility beliefs – fatalism, rigidity of social structures and meritocracy – is important to better understand immigrants’ perceptions and outcomes. Specifically, understanding the intersection of beliefs between immigrants and host country nationals is essential to get a full picture of how these different beliefs can influence the experience of immigrants. In the following section, we propose a relational model to explain how living in a country with people holding these economic mobility beliefs in relation to the beliefs held by immigrants influences the self-esteem of immigrants.
Development of propositions

This paper proposes ways in which the intersection between the two sets of economic mobility beliefs – those held by host country nationals and those held by immigrants – affect immigrants’ self-esteem. Table I shows a summary of these intersections and our propositions.

According to terror management theory, when immigrants are aware of their own mortality, the extent to which there is congruency between their economic mobility beliefs and those of host country nationals will affect their self-esteem (Greenberg et al., 1997). Although this congruency or lack thereof may also affect the self-esteem of host country nationals, this enquiry is beyond the scope of this paper. Thus, if immigrants’ beliefs are not confirmed, their self-esteem will be negatively affected.

First, this paper considers the interrelations of individual immigrant’s beliefs in fatalism and three different beliefs held by host country nationals. When both immigrants and host country nationals believe in fatalism, immigrants’ beliefs will be confirmed. This confirmation will comfort immigrants. Thus, terror management theory predicts that in these circumstances, their self-esteem will not be negatively influenced:

\( P1. \) If both immigrants and host country nationals believe in fatalism, immigrants’ beliefs will be confirmed. Thus, the influence on immigrants’ self-esteem will not be negative.

When immigrants believe in fatalism and people in the host country believe in rigid social structures, immigrants’ beliefs will be misaligned but not entirely incompatible. Although believing in fatalism is not the same as believing in rigid social structures, both sets of beliefs suggest little control over outcomes. Fatalism describes a more general belief in the inevitability of one’s future, while the belief in rigid social structures addresses the specific impossibility or, at the least, low-likelihood of economic mobility. Immigrants who believe in fatalism can learn to accept their socioeconomic status as their fate. Thus, according to terror management theory, when immigrants believe in fatalism and host country nationals believe in rigid social structures, there will be no negative influence on immigrants’ self-esteem:

\( P2. \) If immigrants believe in fatalism and host country nationals believe in rigid social structures, immigrants’ beliefs will be misaligned but still compatible with those of host country nationals. Thus, the influence on immigrants’ self-esteem will not be negative.

However, when immigrants believe in fatalism and host country nationals believe in meritocracy, immigrants’ beliefs will be disconfirmed. In this scenario, immigrants will believe they must accept their fate, whereas the mainstream belief of host country nationals is that one must work hard to earn positive work outcomes. They will receive the message that they are expected to work hard for their economic mobility and that if they do not achieve

<table>
<thead>
<tr>
<th>Immigrant beliefs</th>
<th>Host country national beliefs</th>
<th>Meritocracy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fatalism</td>
<td>Beliefs confirmed by HCNs; self-esteem not affected (( P1 ))</td>
<td>Beliefs disconfirmed by HCNs; self-esteem negatively affected (( P7 ))</td>
</tr>
<tr>
<td>Rigid social structures</td>
<td>Beliefs somewhat aligned with HCNs’s beliefs; self-esteem not affected (( P2 ))</td>
<td>Beliefs disconfirmed by HCNs; self-esteem negatively affected (( P3 ))</td>
</tr>
<tr>
<td>Meritocracy</td>
<td>Beliefs confirmed by HCNs; self-esteem not affected (( P5 ))</td>
<td>Beliefs confirmed by HCNs; self-esteem negatively affected (( P6 ))</td>
</tr>
<tr>
<td></td>
<td>Beliefs disconfirmed by HCNs; self-esteem negatively affected (( P8 ))</td>
<td>Beliefs confirmed by HCNs; self-esteem not affected (( P9 ))</td>
</tr>
</tbody>
</table>

Table I. Interplay of the economic mobility beliefs of host country nationals (HCNs) and immigrants in relation to the self-esteem of immigrants
positive outcomes, this is their own fault. This lack of confirmation will be uncomfortable for immigrants because their fundamental belief is that they do not have control over their destiny. According to terror management theory, this lack of confirmation when mortality is salient, will cause immigrants to experience uncertainty and anxiety and will negatively influence their self-esteem:

P3. If immigrants believe in fatalism and host country nationals believe in meritocracy, immigrants’ beliefs will be disconfirmed. Thus, the influence on immigrants’ self-esteem will be negative.

Now, the interrelations of individual immigrant beliefs in rigid social structures and three beliefs of host country nationals are considered. When immigrants believe in rigidity of social structures and host country nationals believe in fatalism, these beliefs are somewhat similar. They both suggest that things are the way they are and there is little to be done to change them. Thus, the lack of confirmation that social structures are rigid will be small and unlikely to influence the self-esteem of immigrants:

P4. If immigrants believe in rigidity of social structures and host country nationals believe in fatalism, immigrants’ beliefs will be misaligned but still compatible with those of host country nationals. Thus, the influence on immigrants’ self-esteem will not be negative.

When both immigrants and host country nationals believe in rigid social structures, immigrants’ beliefs will be confirmed. This confirmation will comfort immigrants. Thus, according to Terror Management Theory, confirmation of beliefs will have no negative influence on immigrants’ self-esteem:

P5. If both immigrants and host country nationals believe in rigidity of social structures, immigrants’ beliefs will be confirmed. Thus, there will be no negative influence on immigrants’ self-esteem.

When immigrants believe in the rigidity of social structures and host country nationals believe in meritocracy, immigrants’ beliefs are disconfirmed by host country nationals. In this case, immigrants believe you are born into a certain socioeconomic status and host country nationals believe you need to work toward achieving the socioeconomic status you desire. The belief in meritocracy suggests that social structures are flexible and changeable for individuals based on their motivation and hard work. For immigrants, when mortality is salient, the lack of confirmation of their beliefs that social structures are rigid, according to terror management theory, will negatively influence their self-esteem:

P6. If immigrants believe in rigidity of social structures and host country nationals believe in meritocracy, immigrants’ beliefs will be disconfirmed. Thus, the influence on immigrants’ self-esteem will be negative.

Lastly, the interrelations of immigrants’ beliefs in meritocracy and three different beliefs of host country nationals are considered. When immigrants believe in meritocracy but host country nationals believe in fatalism, there is a lack of alignment of beliefs. In this scenario, immigrants believe effort and merit determine one’s work success, whereas host country nationals believe one should not aspire to achieve more positive work outcomes through merit, but rather, immigrants should accept their fate without questioning it. This lack of alignment will cause discomfort to immigrants when mortality is salient and, according to terror management theory their self-esteem will be negatively influenced:

P7. If immigrants believe in meritocracy and host country nationals believe in fatalism, immigrants’ beliefs will be disconfirmed. Thus, the influence on immigrants’ self-esteem will be negative.
When immigrants believe in meritocracy but host country nationals believe social structures ought to be rigid, beliefs are not aligned. Immigrants will experience discomfort because the host country nationals will not confirm their worldview that merit should determine the distribution of rewards and wealth. According to terror management theory, when mortality is salient, immigrants will experience a negative influence on their self-esteem because of the lack of congruency between their beliefs and those of host country nationals:

P8. If immigrants believe in meritocracy and host country nationals believe in the rigidity of social structures, immigrants’ beliefs will be disconfirmed. Thus, the influence on immigrants’ self-esteem will be negative.

When both immigrants and host country nationals believe in meritocracy, host country nationals will confirm immigrants’ beliefs. This confirmation of beliefs will give immigrants some comfort. According to Terror Management Theory, the confirmation of beliefs will not have a negative influence on immigrants’ self-esteem:

P9. If immigrants and host country nationals both believe in meritocracy, immigrants’ beliefs will be confirmed. Thus, the influence on immigrants’ self-esteem will not be negative.

Our model shows that the interplay between immigrants’ and host country nationals’ economic mobility beliefs may positively or negatively affect immigrants’ self-esteem, depending on the perceived inconsistencies between these beliefs.

Discussion and contributions

This paper focuses on one factor that may bring about decreases in immigrants’ self-esteem, which in turn may influence their job performance and job satisfaction (Judge and Bono, 2001) – the misalignment of economic mobility beliefs between immigrants and host country nationals in the context of a heightened awareness of mortality. This paper proposes that mortality is likely to be salient in a global climate of anti-immigrant sentiment and policies and in conditions of economic deprivation. A relational model is proposed to explore how convergent or divergent economic mobility beliefs between immigrants and host country nationals affect the overall experience of immigrants, specifically their self-esteem.

While previous studies have proposed that multiple actors such as host country nationals, potential employers and immigrant traits and behaviors play important and complementary roles in determining immigrant outcomes (e.g. Turchick-Hakak and Al Ariss, 2013), this literature has not yet explained how these interrelations of beliefs take place and how they influence immigrants. In addition, while other studies have addressed the internal and psychological aspects of the immigrant experience (Al Ariss, 2010; Turchick-Hakak et al., 2010; Zikic et al., 2010), few have considered the multiple external as well as internal factors that influence this experience (e.g. Jasinskaja-Lahti et al., 2003; Phinney et al., 2001). This paper addresses the relationship between immigrants’ and host country nationals’ beliefs and explains how this relationship relates to a specific and important outcome – immigrants’ self-esteem.

This paper also contributes to the current body of knowledge by explaining how a negative climate for immigrants may influence their ability to contribute economically to the host country. As we have shown, in a context in which immigrants have a heightened awareness of their own mortality, the perception that host country nationals have economic mobility beliefs different from their own may negatively impact their self-esteem. Immigrants with lower self-esteem are less likely to find work (Kanfer et al., 2001; Wanberg et al., 2000) and when they find a job, they are likely to have negative work-related outcomes (Judge and Bono, 2001).
Practical implications

In addition to the theoretical contributions proposed above, this paper also contributes to practice. Potential immigrants, especially those who have choices in their destination, may want to investigate countries and choose a host country that is a good “fit” for them regarding their worldviews and beliefs (Dickmann and Cerdin, 2014). This better “fit” between the beliefs of the immigrants and host country nationals would decrease the likelihood that immigrants would suffer from discrepancies between their worldview and that of host country nationals, therefore maintaining their self-esteem. A better fit would also benefit the host country because it will increase the likelihood that immigrants will have positive experiences and potentially yield better work outcomes for immigrants.

Our model suggests that at least some decrease in self-esteem has to do with expectations, and whether or not these expectations are met. Host countries may benefit from being more explicit about the beliefs that are held by individuals in the country. This explicit communication may lead immigrants to make better decisions or be more patient as they become accustomed to their host country. Although the propositions are not developed considering specific organizations, managers may also want to be explicit about the organizational culture in particular when hiring immigrants so that the discrepancy between worldviews will be less likely to occur or will at least be expected by immigrants.

Also noteworthy is that our propositions are developed in a context that is not welcoming to immigrants. In this context, immigrants experience mortality salience and negative influences to their self-esteem when their beliefs are not congruent with those of the host country nationals. However, under a more welcoming reception, they would be unlikely to experience these negative consequences. It is therefore beneficial for both nations and organizations to be more welcoming of immigrants so that their experiences and work outcomes can be more positive.

Future research

Regarding opportunities for future studies, besides testing the proposed model, it would be beneficial for future research to build upon the ideas proposed here. For instance, future research may expand the model beyond the three economic mobility beliefs proposed to consider other types of beliefs. Future research may also consider other outcomes beyond self-esteem. In addition, future research should explore the emotional outcomes of the different beliefs when facing negative and positive work outcomes. Studies may also investigate how cultural norms about the expression of these emotions affect the well-being of immigrants. In addition, global mobility research should build upon immigration research and consider whether less permanent migrants also encounter the outcomes and issues faced by immigrants.

Gray and Kish-Gephart (2013) wrote about the anxiety caused by interacting with individuals of a different social class in the workplace, and its impact on identity as well as on the enactment of identity-protecting and identity-restoring behaviors. It would be interesting to conceptualize this model for immigrants who experience interaction with members of a different social class, and simultaneously find themselves belonging to a different social class in the host country than the one they belonged to in their home country. The experience of losing social status as an immigrant has been mostly overlooked in the underemployment, expatriate and immigrant literatures.

Finally, to our knowledge, this is the first paper to use terror management theory in the context of immigrants. This theory is useful in explaining how individuals react to comparisons between different beliefs when mortality awareness is present. Therefore, it was specifically well suited for a relational model addressing the consequences of the interplay between different parties’ worldviews, considering the context of a predominantly negative climate toward immigrants. With this in mind, future studies would do well to explore other negative effects of a negative climate toward immigrants.
References


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The Global Mobility function
From tightrope walker performing a balancing act towards knowledge broker and linchpin

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Abstract

Purpose – The purpose of this paper is to explore the transformation of the Global Mobility (GM) function within global organisations from a tactical/transactional into a strategic function to add value to the business and international assignees.

Design/methodology/approach – The method of research is an exploratory, qualitative study using an interpretivist paradigm. In total, 37 GM specialists working and living across Europe, America and Australasia were interviewed.

Findings – Administrative burden, organisational culture and structure, lack of alignment with the business and talent management and the lack of capabilities of the GM function and GM specialists inhibit the transformation from a tactical/transactional GM function into a Strategic GM (SGM) function.

Research limitations/implications – Although this study included a variety of stakeholders of the GM function, it did not include line managers and senior executives. Therefore, future research should capture the views on the GM function of middle and top management of global organisations to provide a more comprehensive view on SGM.

Practical implications – The designed “Global Mobility Specialists Competencies” model presents the competencies GM specialists and functions need to develop to be able to fulfil the role of a business partner and to create a GM function that is agile, flexible and responsive to create sustainable value for the organisation.

Originality/value – This paper identified the characteristics of the roles of the GM function and GM specialists unravelling how these influence the transformation of the GM function into a strategic function.

Keywords Challenges, Competencies, Roles, Stakeholder liaison, Strategic Global Mobility

Paper type Research paper

Introduction

Globalisation has resulted in companies doing more and more business across national borders and there is increased competition for new customers and markets. Consequently, an internationally mobile workforce is essential for achieving strategic objectives (Santa Fe, 2018). Efficient global expansion and growth is critical for today’s enterprises and hinges on global staffing, i.e. the employment of home, host and third country nationals to fill key positions, who can work effectively in organisations’ geographically dispersed operations to support the organisational goals and objectives (Collings and Isichei, 2017; Schwartz et al., 2010; Stahl et al., 2012).

In today’s volatile, uncertain, complex and ambiguous (VUCA) world (Bennett and Lemoine, 2014; Dickmann and Debner, 2018), there are significant challenges to global staffing and movement of people across borders, including governance, compliance issues, stricter immigration, international corporate/individual tax liabilities, talent management, career planning and service delivery (Collings and Isichei, 2017). In the context of these challenges, it is typically the Global Mobility (GM) function in multinational organisations (MNCs) that arranges the mobilisation and employment of staff to conduct cross-border activities. Yet, many MNCs fail to recognise the business benefits the GM function derives from adequately dealing with these challenges to ensure smooth, compliant and strategic GM. Business benefits of effective strategic GM include supporting new business growth, improving financial performance, developing talent fitting the needs of the business, improving return on investment (ROI), and reducing the risk of non-compliance (Schwartz et al., 2010).
To date there is a dearth of academic research on the impact of the aforementioned challenges on the GM function, and the need for the GM function to transform into a strategic function to add value to the business. Therefore, the purpose of this paper is to provide insight into the transformation of the GM function into a Strategic Global Mobility (SGM) function within global organisations. First, it elaborates on the barriers and challenges in the internal and external environment in this VUCA world that influence the transformation of GM into a strategic function. Second, this paper responds to the call of scholars that academic research should focus on understanding what the key required capabilities are and how the value of GM can be better captured (Doherty and Dickmann, 2012; McNulty et al., 2009). Thus, this paper investigates the characteristics and capabilities of the GM function and GM specialists, shedding light on the SGM actual-intended gap, i.e. the current vs the future roles of the GM function to identify where and how the GM function can add value to its stakeholders. This paper attempts to answer the following research question:

\textbf{RQ1.} What are the factors that inhibit and help the GM function in its transformation from a tactical/transactional function into a strategic function?

The first contribution of this paper is that it integrates International Human Resource Management (IHRM), Human Resource Development (HRD) and GM literature this paper identifies the current and future roles and capabilities of the GM function and GM specialists and how these affect the transformation of the GM function into a strategic function. In so doing, this paper reveals that the lack of liaison and engagement with key stakeholders, lack of alignment between business strategy and GM strategy as well as lacking capabilities to be a strategic business partner and make a sound business case inhibit GM functions to transform into strategic functions.

The second contribution is that this paper presents a “Global Mobility Specialist Competencies” model, pinpointing the competencies required to fulfil a strategic business partner role and transform GM into a strategic function. This paper first discusses the triggers that drive the change in the GM function and the need for transformation of the GM function. Second, it outlines the challenges that GM functions face in their transformation journey towards a strategic function. In so doing, the paper looks at the roles, purpose and future of GM functions. Two theoretical models are presented, identifying the characteristics of the roles of the GM function and GM specialists, which serve as the framework for the empirical investigation. In a subsequent section, the methodology of the present study is outlined. Fourth, findings of the empirical study are presented followed by a discussion, addressing limitations and providing suggestions for further research and making recommendations for practice. Finally, a reiteration of the study follows in the conclusion.

\textbf{Literature review}

Strategic IHRM is about enabling successful operations in different national environments across the globe, balancing its global and local priorities (Farndale et al., 2017), and is concerned with the practice of managing people globally (Caligiuri et al., 2016; Zhong et al., 2016). IHRM is a relatively nascent, though rapidly evolving field when considered in the context of related areas of enquiry in management and business administration (Farndale et al., 2017). Relatively new within IHRM is GM that arguably is positioned in the comparative tradition of IHRM that shows a preference for exploring the context, systems, content and national patterns of HRM as a result of the distinctive developmental paths of different countries and territories. There is a related, but distinct, cross-cultural management thread dedicated to explicating tenets of national culture as the dominant paradigm for conditioning and explaining what is acceptable organisational practice in particular sociocultural contexts (Farndale et al., 2017). It is due to the nature of IHRM – global implications, cultural diversity and local practices – that the topic and practice warrant increased focus and attention by society, HR and management.
scholar-practitioners (Farndale et al., 2017). This paper draws more attention to IHRM topic and practice by focusing on the Strategic IHRM domain “SGM” and the GM function within MNCs, which is embedded in a complex context that encompasses international and local laws, immigration policies, compliance, international taxes, social security, pensions, culture, global talent development, etc. Given the complex context, the centrality of effective global staffing arrangements for the ability of MNCs to deliver on their strategic objectives remains one of the key areas of research in IHRM (Collings and Isichei, 2017). Global staffing is at the core of the GM function, but with its infancy come contestations regarding how the function might best be organised, what its priorities should be, who the salient stakeholders are, along with how value for the international business is generated that positively affect bottom-line results. This calls for further research into the GM function.

Global Mobility transformation
IHRM is everchanging and is in a constant state of transformation to create a function that can play a strategic role while successfully filling its other roles (Farndale et al., 2017; Noe et al., 2015). So is the GM function. The external and internal triggers that are driving the change in the GM function are (Robb and Au, 2016):

- strategic business objectives involving GM;
- increased compliance/scrutiny;
- entry into new markets; and
- increased focus on talent development.

The transformation of the GM function from a tactical/transactional function into a strategic position within the company is receiving increasing attention. Why? Because transformation into a more strategic position is required for GM to remain valuable and sustainable as a corporate function by having recognised significance to business strategy (K2 Corporate Mobility, 2016). With a strategic focus on value back to the business, the GM function can move towards becoming an appreciated strategic business partner to the business and a contributor to international growth (K2 Corporate Mobility, 2016). The real benefit of GM transformation will be the improved ability to execute the organisation’s mobility strategies and, in turn, address business needs for growth, globalisation and global talent management (GTM) (Robb and Au, 2016).

Having addressed the “why” of transformation, it is also important to look at the “what”. What are the changes in the GM function? According to the findings of the AIR-INC (2019) survey the most significant change in the GM function itself today is how the function communicates and engages with customers. Participants reported ongoing and planned initiatives to improve GM’s visibility and engagement with customers, and many are leveraging technology and vendors to make that happen. GM is also increasingly focussed on providing the business accurate cost estimates and planning support (AIR-INC, 2019). The present study further explores these changes in GM functions and the challenges they face in the transformation. In so doing, it explores the roles and characteristics of the GM function and GM specialists, addressed in the next section of this paper.

The purpose, future and role of Global Mobility
The adage of Dickmann and Debner (2018) is “Agile Global Mobility: Living the Purpose and Increasing Value” where GM of the Future is SAFE: Smart, Agile, Flawless and Efficient. To arrive at this future role stage, it is worthy to explore what the historical and current role is and what is needed to transform into it future role.
The historical role of the GM function is transactional, where mobility work is strongly process and compliance oriented to the detriment of strategic work; being flawless in compliance is highly important because of the multiple risks that come with non-compliance (Dickmann and Debner, 2018). However, GM is no longer expected to take merely a compliance-driven approach. Instead, in response to a more complex and challenging environment, GM needs to evolve from being a pure administrative function to a partner that can deliver unique business support capabilities and take a business/value-driven approach where:

(1) The GM function is considered a strategic advisory function; there is an increasing expectation for GM professionals to act as advisors and partners to the business to help in global workforce planning, ensuring key experts within the organisation are placed in critical or pivotal roles that they are uniquely qualified for and that are central to firm strategy. By fulfilling this strategic partner role, the GM function is a key enabler of the business strategy and helps to achieve business and talent goals, which would add value to the GM function (Collings and Isichei, 2017; Dickmann and Debner, 2018; Robb and Au, 2016; Robb and Odell, 2015). Although GM specialists are increasingly acting in an advisory role – the RES forum survey 2018 showed that two thirds (62 per cent) of senior GM professionals now work as a strategic advisor – the same survey showed that almost half (48 per cent) of MNCs seem to be suffering from a lack in strategic GM advice (Dickmann and Debner, 2018). The picture that the AIR-INC (2019) survey painted is more gloomy: GM tends to play an advisory role with 39 per cent of organisations. Hence, there are still gaps to fill in GM’s role.

(2) GM, talent and reward are fully aligned; this would result in sending assignees abroad who have the appropriate set of drivers for the objectives of the organisation. In addition, this allows the selection of better matched assignment types, e.g. short-term, long-term, business travel, cross-border commuting, etc., and accordingly refining reward mechanisms (AIR-INC, 2019; Dickmann and Debner, 2018; Robb and Odell, 2015).

(3) Performance metrics are tracked via advanced reporting in real time using data analytics, with respect to, e.g. risk identification, vendor performance, security and crisis management, etc. (Dickmann and Debner, 2018; Robb and Odell, 2015).

(4) Programme costs are proactively planned, monitored and used to guide global resourcing decisions (Dickmann and Debner, 2018; Robb and Odell, 2015).

In order to add value and to adapt quickly to changing organisational needs, GM functions need to have an appropriate structure, branding, service delivery model, business aligned policies, streamlined, seamless and highly automated processes gained from mobility technology – which can yield efficiency and cost reduction – and the skillset and knowhow (Dickmann and Debner, 2018). Underpinning all this should be an organisational culture that is supportive of GM as both a strategic enabler and business partner (Robb and Au, 2016; Robb and Odell, 2015).

Yet, the Deloitte Pulse Survey (Robb and Au, 2016) revealed that GM functions face barriers and challenges in functioning as business partners and strategic advisers due to the following reasons:

- the increased scrutiny on compliance, which makes the function too compliance driven;
- lack of time due to administrative duties;
- mobility brand only viewed as transactional within the business;
- company culture or structure;
Given that the Deloitte survey addressed the barriers and challenges that GM functions face in functioning as business partners, but not how these affect GM transformation, more research is needed to gain insight into how these and potentially other barriers and challenges hinder the GM function in transforming into a strategic function. This paper presents such research by delving deeper into the current and intended roles of the GM function and GM specialists, which the next section addresses.

### Characteristics of the GM function and GM specialists

To explore the roles of the GM function, this paper utilises the model of Robb and Au (2016), which identifies the traits of GM roles in a strategic (intended) vs a support (actual) role, displayed in Figure 1. The rationale for choosing this model is as follows: the gap between practice and research is widening as the world of practice speeds up, potentially basing activities on research models that are outdated as they do not represent the temporal or short-term focus of emerging IHRM trends (Farndale et al., 2017). The model in Figure 1, as opposed to any academic, scientific model, does represent the current world of GM practice and the transformation of the GM role; hence, this model is deemed to be best suited for the present research.

In the role of strategic advisor GM professionals need to understand the manifold ramifications of their organisation’s strategy and the diverse GM avenues that could be pursued to realise their MNC’s ambition (Dickmann and Debner, 2018). Furthermore, analogous to the HR professional (Conner and Ulrich, 1996; Mitchell et al., 2013), the GM

### Figure 1.
Common identifiable traits of a Global Mobility strategic role vs a support function role

<table>
<thead>
<tr>
<th>Key Characteristics of a Strategic Role</th>
<th>Key Characteristics of a Support Function Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focusses their role on creating competitive advantage in line with the business and talent goals of the company</td>
<td>Spends their time largely on standardised repeatable work</td>
</tr>
<tr>
<td>Demonstrates credibility and personal impact required to influence key stakeholders</td>
<td>Experiences difficulties with building relationships and making an impact on the business</td>
</tr>
<tr>
<td>Measures and communicates the contribution and impact of global mobility</td>
<td>Struggles with taking the big picture perspective needed to align the global mobility agenda with the business agenda</td>
</tr>
<tr>
<td>Delivers against defined global mobility and business objectives</td>
<td>Lacks clearly defined responsibilities or handoffs with other parts of the business</td>
</tr>
<tr>
<td>Demonstrates breadth of knowledge and proven set of skills including customer centricity and advisory skills</td>
<td>Requires support with developing the skillset needed to meet business expectations</td>
</tr>
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</table>

Source: Adapted from Robb and Au (2016)
professional in a strategic role operates as an employee champion and change-agent, motivated to explore new policies and practices to build GM-related capabilities.

One key question that emerges in the academic debate is the skill-set required of GM professionals to deliver on the strategic IHRM and business agenda (Caligiuri and Bonache, 2016). Evidence suggests that currently there is a mismatch between the skills and capabilities of the GM function and the new requirements placed on it (Cerdin and Brewster, 2014; Dickmann, 2018; Farndale et al., 2014; Noe et al., 2015). Hence, this paper explores the skill-set, knowledge and abilities of GM specialists to assess their capability of performing in a strategic role. In so doing, this study draws upon the distinction between what Deloitte (2011) has described as “lagging” vs “leading” HRD specialists. Table I is the adapted version of the model of Deloitte (2011) applied to the GM professional.

The important differences between a lagging and a leading HRD specialist are that, to operate effectively as a leading specialist, there must be a strong focus on strategic issues that contribute to business growth and competitiveness. Lagging specialists are too focussed on and preoccupied with transactional work. They also struggle with making an impact in the business, which is required in a strategic role, depicted in Figure 1. The specialist must also have the skill to take a big picture perspective regarding organisational strategic priorities and goals but often they require further support with critical business skills or GM skills as Table I depicts. This paper will further explore the know-how and skill-set required of GM professionals to deliver on the SGM and business agenda.

The two presented models in Figure 1 and Table I form the theoretical foundation to empirically explore the characteristics of the GM roles and specialists in order to unravel why GM functions struggle to transform from a tactical/transactional into a strategic function.

**Method**

The method of research is an exploratory, qualitative study using an interpretivist paradigm to allow the emergence of context-specific patterns and to gain a “deeper” understanding of social phenomena (Gill et al., 2008; Patton, 2015). This method was deemed most appropriate, because there is a lack of earlier studies on the study phenomenon, the transformation of the GM function into a strategic function to create value for the globally mobile employee and the business. In essence, the research aimed to gain further insights into GM transformation rather than to test pre-determined relationships.

**Sample and procedure**

A purposeful sampling was employed, because it is a widely used approach to identify and select information-rich cases related to the phenomenon of interest; its logic and power lies in selecting information-rich cases for in depth study, i.e. cases from which one can learn a great deal.

<table>
<thead>
<tr>
<th>Lagging</th>
<th>Leading</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retain large proportion of their operational duties</td>
<td>Spend their time primarily on strategic tasks that contribute to key business priorities</td>
</tr>
<tr>
<td>Struggle with making an impact in the business</td>
<td>Clearly measure and articulate the value they bring to the organisation</td>
</tr>
<tr>
<td>Find it difficult to balance business and GM agendas</td>
<td>Effectively deliver against aligned SGM and business agendas</td>
</tr>
<tr>
<td>Lack clearly defined responsibilities or handoffs with other GM/HRM areas</td>
<td>Having a clear and transparent role to play in SGM service delivery</td>
</tr>
<tr>
<td>Require further support with critical business skills or GM skills</td>
<td>Are considered top talent within the organisation</td>
</tr>
</tbody>
</table>

*Source: Adapted from Deloitte (2011)*

**Table I.** “Lagging” and “leading” GM specialists
deal about issues of central importance to the purpose of inquiry (Creswell, 2013; Patton, 2015), in the present study the transformation of GM functions. Purposeful sampling is a technique that involves identifying and selecting individuals or groups of individuals that are especially knowledgeable about or experienced with a phenomenon of interest, who have the availability and willingness to participate, and the ability to communicate experiences and opinions in an articulate, expressive and reflective manner to yield insights and in-depth understanding (Creswell, 2013; Palinkas et al., 2015; Patton, 2015). In order to select individuals who are especially knowledgeable about and experienced with GM and who would be able to communicate their opinions on the roles of the GM function, the author used her professional network built through the Expatriate Academy (2018) in the Netherlands, through LinkedIn and at the Forum for Expatriate Management event in Amsterdam on 22 March 2018. The total sample comprised 37 participants[1]. The sample included Global/International Mobility Head/manager/coordinator, GM consultants (external), Global Compensation and Benefits Head/Advisers, Relocation/move management coordinators, Immigration lawyer/specialists, Tax adviser/Head of Tax, HR/People director/business partner. Empirically exploring the views of GM specialists and several internal and external stakeholders of the GM function allowed for the ability to compare and contrast, to identify similarities and differences in the phenomenon of interest, typical of purposeful sampling designs (Palinkas et al., 2015).

Participants originated from countries across America, Europe, the Middle East and Australasia, with the Netherlands being the dominant country in terms of respondents’ origin and current, prime work location. The majority of respondents were male (67 per cent).

In total, 16 participants had never lived and worked abroad, whereas 21 participants had lived and worked in the following locations: Australia, Brazil, Canada, China, Dubai, Germany, Guadalajara Area, Guatemala, Honduras, India, Indonesia, Italy, Latvia, Mexico, Morocco, New Zealand, Pakistan, Switzerland, Saudi Arabia, Singapore, Turkey, UK, USA.

Eight participants were expatriates at the time of participation in the study.

Data collection

Given that this study is exploratory, interviews are a suitable method of data collection, because, interviews can be used to explore the views, experiences, beliefs and motivations of individual participants (Dickmann and Cerdin, 2014; Gill et al., 2008). The interview protocols for either the GM function holders (e.g. International Mobility Head) or various stakeholders (e.g. immigration lawyers) contained both structured and semi-structured questions, that would allow for probing where information seemed to be leading to deeper or unusual insights (Yin, 2014).

Sample questions were:

- How do you view the purpose and the future of GM and the role it plays in contributing to business success?
- In what does the GM function and you as a GM professional within this organisation excel?
- How do you ensure the alignment between GM and the business strategy?

Prior to conducting the interviews, the interview protocol was provided to the participants through e-mail, to give them insight into the questions. Participants were also given assurance about confidentiality of their identities and the interview data.

Interviews took place between April and September 2018, either face-to-face, or via telephone, WhatsApp call, Go-to-meeting, Webex or Skype (because of geographical distance) and lasted between 45 and 60 min.

Data collection continued until a comprehensive understanding of the phenomenon and a point of informational redundancy was reached where repetition of information occurred
and confirmation was obtained of existing conceptual categories, i.e. “category saturation” (Corbin and Strauss, 2008; Palinkas et al., 2015).

Member-checks, a crucial process that any qualitative researcher should undergo because it is the heart of credibility (Creswell, 2013; Lincoln and Guba, 1985), were conducted by sending the analysed and interpreted data in the form of interview transcripts to the interviewees for them to evaluate the interpretation made by the inquirer and to suggest changes if they were unhappy with the data reported or because they had been misreported. Hence, member-checks were used to establish the rigour of the inquiry in the present study and to establish whether or not the research findings represented plausible information drawn from the participants’ original data and are a correct interpretation of the participants’ original views (Lincoln and Guba, 1985).

Data analysis
Gathering and analysing data was conducted concurrently in line with descriptive qualitative approaches, thus adding to the depth and quality of data analysis (Vaismoradi et al., 2013). Inductive content analysis was performed to derive coded categories from the text data (Vaismoradi et al., 2013). The approach to the qualitative content analysis was “directed”, that is, the analysis commenced with an initial coding scheme based on the research concepts, such as “transformation” or “GM purpose and future”. Even though the codes were selected in advance, they did not remain fixed during the analysis, but rather were refined through successive iterations between theory and data, in line with Welch et al. (2011). This approach to content analysis enabled successive iterations between theory and the data set and each iteration led to a modification to and enrichment of conceptual understanding that is grounded in empirical data. This approach elucidated the commonalities and differences between current and future roles of the GM function as experienced vs desired by participants.

The inductive content analysis was followed by summative content analysis to explore salience in the sample (Rapport, 2010). The frequent occurrence of words or terms, such as “alignment”, “transactional”, “buy in/commitment” could not only indicate greater importance for participants in relation to the transformation of the GM function, but it might also reflect greater willingness or ability (Loffe and Yardley, 2004; Shields and Twycross, 2008) to talk at length about the manifestation of challenges that GM functions face in their transformation journey.

Essentially, the content analysis of the interviews entailed interpretive sensemaking, a subjective search for meaning arriving at contextualised explanations: an understanding of actors’ subjective experiences and explanations in the form of causal mechanisms and the contextual conditions under which they work (Welch et al., 2011). This was necessary for understanding the factors that help and hinder the transformation of GM into a strategic function. The analysis resulted in new insights into the studied phenomenon – GM transformation – thereby the study has increased the understanding of particular phenomena to inform practical actions (Krippendorff, 2004). The next section presents the findings of the study.

Findings
The study revealed the following enabling and hindering factors of GM transformation.

The operational quagmire of a process-driven approach
The study revealed that most GM functions continued to fall into the operational quagmire of a purely process-driven approach, rather than a strategic approach. Respondents underlined that GM has tended to focus on costs savings resulting in headcount and budgets cuts rather than building more agile, business-driven GM functions; the focus was on costs and compliance and respondents admitted that currently the GM function is very transactional
and too service-driven. This was partly due to – or perhaps resulted in – the fact that the GM function in some organisations had been relegated to logistics/administrative function. More worryingly, the execution of processes was not always smooth and some functions struggled in getting the basics right. This resulted in a focus on improving the operational aspects (“actual” situation) rather than the strategic aspects. In the “intended” situation, respondents foresaw the GM role moving away from execution to GTM, international strategic workforce planning, through to policy design and review on to the development of new markets. One respondent[2] captured the essence of the current transforming GM role as follows:

The GM function is shifting from a compliance and administrative focus towards becoming a purpose-driven mobility function, a strategic business partner that helps the business to assign people across borders and creating positive employee experiences. Compliance is a hygiene factor, but should not be the main focus. Mobility functions are leaving their silos and are engaging more and more with HR and the business. That is ultimately key, no overlap, but alignment. To thrive in the future, Mobility teams need to engage in the purpose of creating positive assignee experiences. Get an understanding of costs and risk and expansion plans into new markets. (Cade, Managing Director, Strategic Global Mobility Advisory, Switzerland[3])

A lack of “foot in the door” vs “shut the door in my face”. Respondents mentioned that the business often did not involve GM early on in the process to ensure smooth international deployment and to prevent unnecessary costs or delays in project execution. In fact, some respondents mentioned that some businesses kept the door shut for the GM function, because GM was perceived to be too complex, a “necessary evil”:

At higher level management, people are very aged and to make people change their minds and see the relevance of change is really tricky. My expertise is not treated by higher management as expertise, but as a stumble block. They always see the GM function as bringing bad news. (Maisie, Global Mobility Specialist, the Netherlands)

This excerpt implies a lack of receptivity of the business and senior management for the expertise of GM. Furthermore, GM professionals did not get the credit and appreciation for the complexity of the GM function.

Late involvement of the GM function resulted in “whale herding” and “fancy footwork” by HR/GM (Gwenllian, Global Mobility Specialist and Compensation and Benefits Specialist, the Netherlands) to ensure a smooth, speedy international deployment process in compliance with regulatory, statutory and contractual requirements.

The first plausible explanation respondents offered for a lack of early involvement of the GM function in the GM process was mismatches of expectations about the policies and deliverables of the GM function; respondents acknowledged the necessity to better manage expectations of key stakeholders, i.e. assignees and business leaders, about the policies and deliverables of the GM function.

A second explanation respondents offered was a lack of understanding and awareness about what the GM function does and the value of the function. Hence, they emphasised the importance of marketing and promotion of the GM function among business leaders and developing a strong employee value proposition to create awareness of and show the value of the GM function.

Poor organisational culture. A SGM function is a manifestation of a supportive organisational culture, aimed at effectively and successfully deploying, developing and retaining expatriates and repatriates. However, the findings reveal that the organisational culture in some organisations was not supportive of the GM function and herein lies one explanation why the GM function struggles to become a strategic function: most GM functions are embedded in hierarchical organisations with bureaucratic strategies of control, and several respondents commented that top management was typically not committed to
SGM, does not think the topic deserves attention, does not have or communicate its vision on this topic and does not make available the resources to enable the GM function to transform into a strategic function. An explanation respondents provided was that various senior management/board members in their organisations did not have international experience, therefore they did not understand the value of GM. Poor organisational culture and a lack of commitment from the top thus provides an alternative lens to understand why some GM functions have a constrained capability in transforming into and effectively delivering on its intended strategic role.

A lack of alignment between Global Mobility and the business and talent strategy and objectives. Many respondents mentioned the gap between GM and the business and talent management in terms of supporting business and TM strategies.

They did not have sufficient understanding of the business strategy resulting in non-alignment of the GM strategy with the business strategy to achieve business goals.

Respondents acknowledged that being strategic means being aligned with business and talent objectives and they were working on this through building relationships, knowledge-sharing and collaborative efforts:

I see more collaboration between GM and HR in connection with talent development as a part of HR, strategic workforce planning and staffing. That role, the triangle of L&D, HR, recruitment and placing GM within that triangle. Then GM is positioned much better than being a loose unit that provides support only in relocating someone from a to b. You need to embed GM at that level to enable the function to be seriously involved in conversations about what is going on in the business. Often you see that the business sends someone abroad on gut feeling and I wonder why they send this person. It worries me. GM needs to be at the frontline to get and provide the right information to send somebody abroad. (Preston, Strategic Human Resources Business Partner, the Netherlands)

A lack of disrupt and reframe capacity. GM professionals expressed that a major challenge was for the business to give them “a seat at the table”, not viewing them as merely a service provider (“actual”) but viewing them as a business partner (“intended”), involving them in making strategic decisions about GM and to help the business in posting employees internationally in an efficient, strategic and compliant manner. One respondent offered a plausible explanation:

GM does not have a strong enough voice to say to the business or function this is not the person to be sent on an international assignment, this is going to fall out. (Max, Head of People – EMEA/HR Director, UK)

Disruption is enabled by what respondents termed “Impression Management”, exemplified in the following statement:

Get visibility with business leaders by showing examples of costs to the MT. For example, we have a few people who are going to repatriate by 30 June and with a handful of them no next career steps are known. When you show this to MT then you draw their attention. (Sai, Head of International Mobility, the Netherlands)

Impression management is aided by valid metrics and data, but the caveat was the lack thereof, undermining the disruptive capacity of the function. As one respondent expressed:

We only just recently have the ability of the extent of the metrics. So we don’t do any ROI, we are not even aware of the total costs add ups. It does not feel like any questions are being asked, do we do too much or no enough expatriation, is it working for us? Generally, we tend to get it right in terms of who we choose to move and who we don’t. There are exceptions to the rule, but nobody is asking for ROI on it. (Abel, HR Director, UK)

Another explanation for why the GM function was not sufficiently disruptive to effect change in the GM strategy function was the lack of competencies of GM specialists. The culprit was the training and background of GM, which is often in HR service delivery and is not on the
strategic side. Being a business partner, operating at a strategic level, requires a broad skill-set, which some respondents acknowledged GM professionals often lack. This is a concern, because being an adviser to the business in a strategic role is dependent on the ability of the GM professional to be perceived as competent, credible and trustworthy for which the right know-how and skillset are required. The following excerpt is exemplary:

GM people are not as business savvy as they should be. That does not help if they want to argue a case. You need to know the business. Otherwise you get no credibility. (Harley, Global Head of HR, UK)

In summary, the current findings add substantially to our understanding of the transformation journey of the GM function into a strategic function. The inference from the findings is that GM functions and GM specialists are “tightrope walkers”, performing a balancing act in their roles to ensure that all tactical/transactional processes run in a smooth and compliant manner whilst making efforts to transform into a strategic function by focussing on alignment with the business and talent goals and showing the contribution and value of the GM function.

Discussion

The objective of this paper was to provide insight into the factors that hinder and help the transformation of the GM function into a strategic function within global organisations, shedding light on the SGM intended-actual gap, i.e. GM in a tactical/transactional/support role (actual) vs a strategic role (intended).

The first contribution of this paper is that by integrating GM, Strategic, IHRM and HRD literature the paper explored the characteristics of the roles of the GM function and GM specialists unravelling how these influence the transformation of the GM function into a strategic function, which represents a pioneering study in the area of GM. Furthermore, the study not only considers the rigour of IHRM research and publications, but also its relevance to society, such as practitioners and policy makers (Farndale et al., 2017), in this study GM professionals.

Resonating findings from AIR-INC (2019), one of the main challenges for the GM function in the current VUCA world (Bennett and Lemoine, 2014), was the increased scrutiny on compliance, which makes the function utterly focussed on minimising compliance risks. This is understandable, because “flawlessness” in compliance is highly important, due to the multiple risks that come with non-compliance (Dickmann, 2018), but it prevented GM respondents to focus on the intended strategic GM role.

The oppressive burden of administrative, transactional tasks is one often mentioned impediment to achieving success in a strategic role (Mitchell et al., 2013; Noe et al., 2015; Robb and Au, 2016), which explains in part why many respondents struggled to fulfil a strategic role. The caveat of an utility approach to GM, i.e. a focus on transactional tasks and operational processes is that it is concerned predominantly with cost-effectiveness, rather than overall GM effectiveness (McNulty and DeCieri, 2016; Santa Fe Group, 2018). In contrast, drawing upon HR literature and acknowledged by respondents, HR/GM professionals holding a strategic role focussing on transformational activities can lead to significant benefits for the organisation, such as employee retention and promotion post-assignment, long-term capability and adaptability (Mitchell et al., 2013; Noe et al., 2015).

Another challenge was the organisational culture, which should be supportive of GM as both a strategic enabler and business partner (Robb and Au, 2016; Robb and Odell, 2015). Yet, in many respondents’ organisations the culture was one where senior managers and the business were often not receptive to the expertise and advice of the GM function. This may explain why GM specialists were experiencing difficulties with fulfilling their role in helping the organisation and international assignees to achieve their overall objectives and creating competitive advantage in line with the business and talent goals of the company, supporting the contention of Carbery (2015), Hughes and Byrd (2015), Robb and Au (2016) (Figure 1).
Respondents expressed that in a strategic role GM teams would have representation in top management and board meetings to become aware of the business strategy, needs, changes and its implications, upcoming projects and the key internal stakeholders involved (cf. Dickmann, 2018). Accordingly, the GM function can identify what information or assistance the business needs and then redesign and align its GM strategy, policies, processes and operating model to better meet the needs of internal stakeholders. However, representation within top management and board meetings was reality only for a few respondents and the reality was that respondents struggled with having the big picture perspective needed to align the GM agenda with the business agenda and consecutively effectively deliver against aligned SGM and business agendas, substantiating the findings of Collings and Isichei (2017), Robb and Au (2016) (Figure 1) and Deloitte (Table I).

One of the top priorities of GM functions is increased involvement of the GM function in GTM, where GM, TM and Reward are fully aligned (AIRINC, 2019; Robb and Odell, 2015). This makes sense as the integration between GM and global talent is increasingly important in managing the supply and demand of globally mobile professionals (Caligiuri and Bonache, 2016). Moreover, it is important for creating competitive advantage in line with the business and talent goals of the company, a key characteristic of GM's strategic role (Robb and Au, 2016) (Figure 1). It is also a key characteristic of GM specialists’ strategic role, where they spend their time primarily on strategic tasks that contribute to key business priorities (Deloitte, 2011) (Table I).

Therefore, respondents opined that GM functions should engage with relevant stakeholders such as talent management, workforce planning, travel management, the business and the international assignees to become more aligned and strategic, and involved in strategic international workforce planning, attraction, selection, succession and retention, supporting the contentions of Dickmann and Debner (2018) and Noe et al. (2015).

In a strategic role, GM measures and communicates the contribution and impact of GM (Robb and Au, 2016) (Figure 1). GM can demonstrate the value and impact of the function by using metrics – tracked via advanced reporting in real time – that are meaningful to the business and data analytics that measure the effectiveness of GM (Hughes and Byrd, 2015; Robb and Odell, 2015). Yet, the present study found that the caveat within GM was that few GM functions conduct data analytics to be able to show the value of the GM function to the business. In part, this was caused by inadequate provision of resources and support for advanced technology to track and measure data, addressed as a deficiency in strategic development (Carbery and Cross, 2015). Practice within organisations suggests that a variety of metrics are used, albeit not very coherently (Carbery, 2015). Respondents reinforced this suggestion: measurements and metrics, if at all, were focussed on costs estimates of international assignments and key performance indicators. This support the findings from Dickmann (2018) that many companies look at costs primarily to draw up the business case for working abroad and pay less attention to the benefits.

Remarkably, the present study found that for many respondents the often proclaimed value of measuring ROI was a non-issue in their organisations. GM specialists nor the business they served were interested in or focussed on measuring ROI. A plausible explanation is that ROI is often difficult to assess and it seems that in many organisations a “gut feeling” and/or a vague but strong persuasion that sending an assignee into a specific location is beneficial, seems to be regarded as sufficient (AIR-INC, 2019; Doherty and Dickmann, 2012; Renshaw et al., 2018). This reinforces the contention that ROI has remained elusive and there is an absence of robust measurement methods (Carbery, 2015). In fact, some respondents argued that it is complex, if not impossible, to measure GM ROI and to demonstrate a causal link between investment in GM strategies and business results. Notwithstanding the challenges in measuring GM effectiveness, it remains imperative that GM functions adopt an evidence-based management approach setting specific, measurable, achievable, results-focussed and time-bound goals and then deliver against defined GM and
business objectives (Robb and Au, 2016) (Figure 1), as well as using metrics to become a more data-driven GM function to prove GM effectiveness. This is needed to create business cases for investment in resources needed for transformation (Dickmann, 2018; Dickmann and Debner, 2018; Farndale et al., 2017; Noe et al., 2015).

GM of the future is “Smart, Agile, Flawless and Efficient” (Dickmann, 2018), but this study has shown there is a big “actual-intended” gap to be filled by GM functions to fulfil a strategic role and to live up to this adage.

Limitations and suggestions for future research

The first limitation of this study pertains to the uneven distribution of nationality and country of residence within the purposive sample. Most respondents originated from and were residing in Europe, with the Netherlands as the most well-represented country. Although the study included respondents from other continents, namely, America and Australasia, this group was underrepresented. Hence, this limits what Sullivan and Baruch (2009) call the “cross-culture generalizability” of research. Yet, the focus in the present study was not on generalizability, as qualitative studies are typically less focussed on generalising (Miles and Huberman, 1994), but the focus was on gaining deep insights into the transformation of the GM function. Nevertheless, future research into SGM in other world regions is recommended to assess the cross-culture generalizability of the present research.

A second limitation is that, although this study included a variety of stakeholders of the GM function, i.e. HR business partners, talent management, third-party vendors, tax, legal, compensation and benefits and rewards, it did not include key stakeholders, such as line managers and senior executives. Therefore, their invaluable views and perceptions on the GM function, its roles and transformation into a strategic function are missing. The suggestion for future research thus is to include this group in the sample to gain a more comprehensive picture of the factors that hinder and help the GM function to transform into a strategic function.

Practical implications and contribution

This study has several practical implications for GM functions and specialists.

To transform into a strategic GM function there are a number of success factors, extracted from the study findings and the IHRM literature (Noe et al., 2015), GM literature (Robb and Au, 2016) and HRD literature (Carbery and Cross, 2015).

Reduce the administrative workload and transactional activities. Leverage integrated and agile technology solutions that streamline workflow, enable operational optimisation and simplify administration; shared service centres; outsourcing to vendors; reengineering and internal reallocation of roles are key approaches to free up time and resources to focus more on the transformational activities and improve GM effectiveness, which in turn increases the value that GM adds to the business. In this scenario, a GM Centre of Excellence with subject matter experts on, e.g. governance, compliance issues, immigration, international corporate/individual tax liabilities, can focus on the development and delivery of GM programmes and services. A SGM advisory team with strategy experts can focus on the development and implementation of the GM strategy and act a strategic partner to the business on global talent mobility issues, and provide advice on complex international assignments.

Organisational culture and support. Although the focus is often on why and how the GM role should change, the support provided by the organisation to enable this role to be strategic is crucial.

This requires an open, transparent, empowering culture that encourages disclosure and honesty in all decisions and behaviours, collaboration and sharing between the organisational members, provides autonomy, support and tools to GM teams to make decisions within their area of responsibility and to take initiatives and explore new and innovative solutions to GM issues.
This requires top management commitment and involvement and an environment in which GM professionals feel safe to experiment with new GM solutions and be recognised and praised for their contribution. A supportive culture encourages GM functions to innovate, grow and thrive and to build organisation-wide commitment and unity of direction for strategic GM.

**Stakeholder liaison and engagement.** Liaison, communication and engagement with stakeholders, such as senior and line managers and talent management is crucial to develop an understanding of business and Talent strategies, needs and priorities and work strategically with the business to support their GM and talent objectives. Such liaison will provide answers to questions such as:

- Why are we sending an international assignee?
- What are the assignment objectives?
- Who should we move?
- What are the benefits for the employer and employee?
- What package suits the type of assignment and situation best?
- What will the repatriation role and the longer term repatriate career path be?

Accordingly, a GM strategy needs to be formulated (or reviewed and refreshed) aligned to TM and strategic business objectives and be sufficiently flexible to account for changes in individual and organisational needs, business opportunities and challenges and trends in the external environment. The formulation of the GM strategy should be a collaborative effort involving key stakeholders who are committed to its implementation and to ensure the GM strategy is aligned with business and talent needs and objectives.

**Branding, role impact and value proposition.** Clearly defining and communicating the brand and role delivery capabilities to senior management can help enhance GM’s visibility, credibility and impact within the organisation. Creative communications through digital platforms, such as videos, chat features and digital media, to distribute important information and share knowledge with the business will make the function more connected, resourceful and impactful. By focussing on building a GM brand and value proposition, GM professionals can shift the perception of GM from a tactical/transactional function to a trusted, credible advisor on complex GM issues.

**Measure GM effectiveness.** Develop mobility analytics and metrics, such as return on expectations, and international assignment demographics, GM performance data, home/host talent data, GM trends, risks and challenges. These data are the basis for stakeholder reporting, business accountability and positive change and form the input for building a business case, defined as “the tool or document that defines a specific problem, proposes a solution, and provides justifications for the proposal in terms of time, cost efficiency and probability of success” (The Society for Human Resource Management (SHRM), 2018), to get “buy-in” for initiatives and get top management support for their resourcing and implementation. These data are also facts-based means to help the GM function position itself more effectively as an ambassador for the globally mobile workforce and a strategic asset, demonstrating to the business and senior executives/management the contribution that the GM function makes to the GM objectives of the organisation.

This will give the GM function more credibility within the organisation and strengthen its raison d’être.

**Competency development.** GM specialists are advised to engage in training and education to fill gaps in their know-how and skills-set and to enhance their expertise. They need to make sure they are good at exploitation, i.e. efficiently meeting needs in areas where it currently excels as well as exploration, i.e. seeking and recognising new ways to
meet future needs to arrive at the best results for its clients, i.e. the business and the international assignees. In this regard, mentoring and coaching by senior managers and temporarily moving to a business unit and work there for a period of time are useful to develop business acumen needed to function as a business partner of senior management (Carbery, 2015). Finally, it would be advisable for GM specialists to go on international assignments themselves, which will enable them to experience the complex issues of international assignments in real time. In turn, they can utilise their own experiences to add value to the business and the international assignees.

Herein lies the second contribution of this paper by developing a “Global Mobility Specialists Competencies”[4] model, displayed in Table II, presenting the competencies

<table>
<thead>
<tr>
<th>Competence category</th>
<th>Competencies</th>
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<tbody>
<tr>
<td>Field-specific</td>
<td>Knowledge of:</td>
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<tr>
<td>competencies</td>
<td>the various international assignments types/approaches</td>
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<tr>
<td></td>
<td>compliance risks, social security, tax, law and payroll</td>
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<td></td>
<td>health and safety in foreign locations</td>
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<td></td>
<td>compensation and benefits</td>
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<td></td>
<td>international assignee repatriation</td>
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<td></td>
<td>research on HR and GM to innovate and integrate GM policies into solutions to meet</td>
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<td></td>
<td>the expectations, needs and objectives of the business</td>
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<tr>
<td></td>
<td>capable of identifying the social and ethical issues attached to GM practices</td>
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<tr>
<td>Supra-field</td>
<td>a thorough understanding of the global environment involving the social,</td>
</tr>
<tr>
<td>competencies</td>
<td>technological, economic, political, environmental and demographic (PESTLE)</td>
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<tr>
<td></td>
<td>trends facing the industry in which the organisation operates, which affect the</td>
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<td></td>
<td>organisation and its globally mobile employees</td>
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<td></td>
<td>a detailed understanding of the business including its strategy, culture, structure</td>
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<td></td>
<td>and economic financial capabilities</td>
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<td></td>
<td>identify the main internal and external challenges facing the business and the</td>
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<tr>
<td></td>
<td>impact on GM strategy and objectives</td>
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<tr>
<td></td>
<td>be agile and foresee, plan and adapt to changing internal and external</td>
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<tr>
<td></td>
<td>circumstances and geopolitical uncertainty</td>
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<tr>
<td></td>
<td>analyse the key enablers and barriers to strategic alignment between GM, the</td>
</tr>
<tr>
<td></td>
<td>business and talent management</td>
</tr>
<tr>
<td>Connection</td>
<td>develop relationships and partnerships with key stakeholders and be their sparring</td>
</tr>
<tr>
<td>competencies</td>
<td>partner in business issues and priorities regarding GM, speaking the language of</td>
</tr>
<tr>
<td></td>
<td>the business: have business-driven GM conversations</td>
</tr>
<tr>
<td></td>
<td>cocraft a strategic agenda for GM with key stakeholders, defining and detailing a</td>
</tr>
<tr>
<td></td>
<td>plan for addressing the priorities for action and to specify resource requirements</td>
</tr>
<tr>
<td></td>
<td>networking capacity: join GM networks and Communities of Practice (CoPs)(^a) to</td>
</tr>
<tr>
<td></td>
<td>disseminate, diffuse, share and gain knowledge</td>
</tr>
<tr>
<td>Commercial affinity</td>
<td>adopt a more commercial and flexible mindset, think outside of the box to develop</td>
</tr>
<tr>
<td></td>
<td>agile GM solutions</td>
</tr>
<tr>
<td></td>
<td>change management: diagnose GM problems, implementing changes in GM</td>
</tr>
<tr>
<td></td>
<td>policies, practices and operating models, oversee the change in a way that ensures</td>
</tr>
<tr>
<td></td>
<td>its success and evaluate results</td>
</tr>
<tr>
<td></td>
<td>ability to establish SGM performance measures and the ability to collect and</td>
</tr>
<tr>
<td></td>
<td>analyse qualitative and quantitative data to continually assess GM effectiveness</td>
</tr>
<tr>
<td></td>
<td>and, when required, adjust the GM strategy</td>
</tr>
<tr>
<td></td>
<td>ability to calculate costs and benefits of each GM alternative in terms of currency</td>
</tr>
<tr>
<td></td>
<td>value impact and nonmonetary impact.</td>
</tr>
</tbody>
</table>

Notes: \(^a\)A community of practice (CoP) is a group of individuals who share a common interest in a topic, and who deepen their knowledge of it through ongoing interaction and relationship building in their group. A CoP aids in building capability by helping to connect employee skills-sets in the CoP with the skills needed in an organisation (Carbery and Cross, 2015; Noe et al., 2015).
required to fulfil a strategic role and advise the business on SGM issues that impact the effectiveness of the organisation.

With this set of competencies GM specialists will be able to demonstrate credibility and transform from tightrope walkers into knowledge-brokers and linchpins, providing knowledge and developing networks and relationships within and outside the business to create a GM function that is agile, flexible, responsive and ambidextrous to create sustainable value for the organisation.

Conclusion
The purpose of this paper was to provide insight into the transformation of the GM function from a tactical/transactional into a strategic function. The paper investigated the factors that hinder and help the transformation into a strategic GM function. By exploring the characteristics of the roles of the GM function and GM specialists this paper provided insight into why GM functions struggle to transform into a strategic function: administrative burden, organisational culture and structure, lack of alignment with the business and TM, and the lack of strategic capabilities of the GM function and GM specialists inhibit the transformation from a tactical/transactional GM function into a strategic GM function. By contrast, enabling factors are the liaison and engagement with internal and external stakeholders, being a trusted and credible business partner and alignment of the GM strategy with the needs, strategy and objectives of the business.

Finally, this paper presented the required know-how, skillset and role behaviours of GM specialists to be able to fulfil the role of business partners and transform the function into a SGM function and create value for the business and the international assignee.

Notes
1. This sample is an extraction of a wider sample including 76 expatriates and repatriates as part of a broader study on global mobility.
2. The names of interviewees are fictional to protect their anonymity.
3. The country indicates the current residence of the respondent, albeit the person may have executed the particular role in one or multiple foreign locations.
4. This set of competencies is comprehensive, yet not exhaustive, meaning there are many more competencies that GM specialists could potentially develop to perform well in a strategic role. Yet, the competencies presented in this paper would arguably be the essential ones.

References


Further reading

SHRM (2012), SHRM Competency Model, Society for Human Resource Management, SHRM, Alexandria, VA.
About the author

Reimara Valk is Global Mobility professional with experience in the field of Global Mobility, HR practice, education and research gained in multicultural, international work environments. Currently, she works as Assistant Professor at the American University in Dubai. Reimara earned her PhD Degree in HRM/Global Mobility from Utrecht University, the Netherlands; she holds a Master Degree in Human Resources/Global Mobility from Erasmus University, the Netherlands; a Master of Science in Human Resource Studies from Tilburg University, the Netherlands; a Bachelor Degree (2nd degree class) in Business Studies from Anglia Polytechnic University, the UK; and a baccalaureus in Hospitality Management from Saxion University of Applied Sciences. Reimara has been responsible for the development and delivery of the Business Studies curricula at universities (including online, distant education institutes) in the Netherlands (HZ University of Applied Sciences), Iraq (American University of Iraq Sulaymaniya), China (Shanghai Maritime Institute), Malaysia (Curtin University Sarawak) and Dubai (American University in Dubai. She has ten years of teaching and research experience in the field of HRM and Business and Sustainable Development. Reimara has also worked in advisory and support roles in the profit and non-profit organisations in the Netherlands, the UK and India. Reimara has published her research in journals such as the International Journal of Human Resource Management, Human Resource Management and the Journal of Global Mobility. She has won several awards for journal articles and conference papers. Reimara Valk can be contacted at: rvalk@aud.edu

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Children of expatriates: key factors affecting their adjustment

Isabel de Sivatte, Bernadette Bullinger, Miguel Cañamero and Mónica del Pino Martel Gomez

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Abstract

Purpose – The purpose of this paper is to study the antecedents of the adjustment of expatriate children to foreign destinations. It is mainly explained by the transformation of their identities while abroad.

Design/methodology/approach – This research used a mixed-method approach. First, to identify the factors that affect expatriate children’s adjustment, 36 interviews were conducted. An ad hoc survey was then developed, distributed, and analyzed, in order to determine the factors that really help or inhibit the adjustment of expatriate children.

Findings – Expatriate children adapt quite well, and they are mostly interested in fitting in with other children, whether locals or other internationals. Some relevant factors found to relate to adjustment were children’s social skills, their academic self-efficacy, the academic level of the school in the host country, and the support received from their families.

Practical implications – Companies could use the results of this study in their cross-cultural training of expatriate children traveling with families.

Originality/value – This is the first study to examine a rather comprehensive set of factors that affect the adjustment of expatriate children, using a mixed-methods approach.

Keywords International assignment, Antecedents, Survey, Mixed methods, Cross-cultural adjustment, Identity theory, Expatriate children

Paper type Research paper

Introduction

The main goal of this study is to examine the factors that help or inhibit the adjustment of expatriate children to foreign countries they move to with their families. About 70 percent of expatriate children relocate to foreign countries accompanied by their families (Brookfield Global Relocation Services, 2016; Van der Zee et al., 2007). There are therefore numerous children around the world living abroad with their expatriate families. These international relocations during their developmental years will affect them profoundly. Moreover, crossover effects (i.e. effects that occur between individuals that interact regularly, Westman, 2001) most likely occur between family members of the expatriated family. In fact, the academic literature has found that expatriate adjustment is strongly related to family adjustment (Hechanova et al., 2003); both academic studies and consultancies find that family-related problems are the main reason for expatriate assignment failure (Fukuda and Chu, 1994; Brookfield Global Relocation Services, 2016). Examining the antecedents of expatriate children adjustment is therefore relevant; international relocations will greatly affect both them and their expatriate families.

The academic literature and HR practitioners have given scant attention to the adjustment of expatriate children. New studies are warranted, in the quest...
to understand the phenomenon further. The previous qualitative (Weeks et al., 2010) and quantitative studies (Van der Zee et al., 2007; Caligiuri et al., 1998) on the subject have pointed to some of the sources that affect the adjustment of expatriate children. Following their lead, we examine additional antecedents that may help us understand children’s adjustment more comprehensively. Conceptually, Weeks et al. (2010) suggest that the identity formation of expatriate children is crucially affected by international relocation/s. This line of research needs further development, which we attempt in the present research.

The aim of this research was thus to study a set of antecedents to the adjustment of expatriate children, which would be as comprehensive as possible. There being only limited research on the subject, and because the models of expatriate and of spouse adjustment may explain only partially the adjustment of their children, we used a mixed methods approach to examine the phenomenon. We first conducted a qualitative study consisting of 36 interviews with former expatriate children and some who were still expatriates, to identify the factors affecting their adjustment to the foreign countries. Some antecedents to adjustment were also identified in previous qualitative studies (Weeks et al., 2010), narratives (Pollock and Van Reken, 2009) and quantitative studies (Van der Zee et al., 2007; Caligiuri et al., 1998). The identity formation of expatriate children during relocation was the conceptual framework used to understand in part how those factors affected adjustment. An initial model that relates the factors to adjustment was developed, and was tested using the answers (n = 261) to a survey produced ad hoc for this investigation. The main contributions of this research have therefore been: to better understand the adjustment of expatriate children through the lens of their identity formation while abroad, to develop a model of their adjustment which encompasses a comprehensive set of antecedents and to test that model quantitatively. Knowing the factors that help or hinder expatriate children adjustment will assist them to adapt better, while also benefitting their families, as well as organizations that send families abroad.

Identity changes in expatriate children
Identities are self-meanings that define who one is (Burke, 2006); according to social identity theory, part of identity is derived from group membership and from the value given to that membership (Tajfel, 1982). Identity theorists contend that identity is a process; it is not static (Burke, 1991, 2006; Erikson, 1968). It has been argued that experiencing a new culture may disrupt the identity formation of individuals, and may end up changing identity (Burke, 1991). Furthermore, identity formation is critical during adolescence and young adulthood (Erikson, 1968). Jenkins (2008) suggests that for children up to 5-6 years old, the family is the primary context where identity formation occurs. Afterwards, from this age toward adolescence, peer groups become more relevant for their identification. We thus contend that the identity of expatriate children may be shaped while abroad, on the one hand because of international relocation; on the other hand, because of the changes in peer groups it usually involves.

Qualitative studies have described how international relocations have shaped the identities of expatriates (Kohonen, 2008), of their spouses (Collins and Bertone, 2017) and of expatriate children (Fail et al., 2004). The identities of some individuals change more than those of others. A number of experiences related to international relocation that trigger identity changes in expatriates, in spouses and in children, might be similar (e.g. cultural changes). However, other experiences affect more specifically the identification of the expatriate (e.g. professional changes – Kohonen, 2008), of their spouses (e.g. changes in employment status – Collins and Bertone, 2017; Shaffer and Harrison, 2001) or of their children (e.g. changes in peer groups – Erikson, 1968). The experiences of expatriate children, as related to their identity formation and adjustment to the foreign destination, are much less understood than what is known about expatriates or their spouses. Our goal,
then, will be to examine the factors that helped or inhibited the adjustment of expatriate children. Their identity construction while abroad will be used to partly explain this process of adjustment. Subsequently, we describe the two studies undertaken to identify (Study 1) and then test (Study 2) those antecedents to adjustment.

Study 1: development of a model of expatriate children adjustment

Method

Research design and sample. Within the mixed methods approach, the purpose of the initial qualitative study was to explore the phenomenon, and to clarify concepts and instruments for the subsequent quantitative study (Johnson et al., 2007, p. 115; Sieber, 1973; Greene et al., 1989). Study 1 aimed specifically to identify the factors that affect the adjustment of expatriate children, in order to develop hypotheses for Study 2. The research design of Study 1 draws on deductive and inductive elements. In particular, existing theories on expatriate adjustment, along with the few qualitative studies on expatriate children (e.g. Weeks et al., 2010) and on children’s identity formation while abroad, provided us with “theoretical sensitivity” (Glaser and Strauss, 1967) as to which areas might be relevant for the adjustment of expatriate children. However, the lack of studies on the topic (Haslberger and Brewster, 2008; Schütter and Boerner, 2013; Selmer and Lam, 2004) required a research design that – while inspired by various existing theories – is open for topics to emerge inductively from the data (Kelle, 2005).

To identify the antecedents of adjustment of expatriate children, we interviewed 36 individuals who have moved to at least one foreign country with their expatriate parents from birth to 18 years of age. In total, 34 of them evaluated their international experience retrospectively (as in Shaffer and Harrison, 2001); two were still expatriate children, aged 17 and 14 when interviewed. The description of experiences of former expatriate children and of those who were still expatriates was similar. Most participants (67 percent) were 22 years old or younger when interviewed; the average age of all participants was 27. Two of the authors used their network of friends and acquaintances to contact individuals who were still, or who had been, children of expatriates. We also used the snowball sampling technique (Patton, 2002) and asked some participants to introduce us to other interviewees.

Study participants had a diverse background of home and host countries, as Table I illustrates. As shown, home and host countries were located in all continents, but numerous relocations involved mostly Europe and the Americas. In total, 47 percent of the participants were female. On average, interviewees had moved to 3.7 foreign destinations from birth to 18, and had spent 10 years abroad. In total, 67 percent of all the participants’ moves were due to the expatriation of the father, 18 percent to the expatriation of the mother and 15 percent to the expatriation of both parents. In 91 percent of the moves, the spouse relocated as well. While parental support was identified as an important factor for adjustment, we could not see any immediate differences between participants who relocated due to their father’s job or due to their mother’s job or between participants with both parents relocated and those accompanying one parent only. We provide more contextual information on participants in the Findings section.

Collection and analysis of the data. The 36 interviews were semi-structured, and took up to 46 min, with an average of 21 min. Most were conducted face-to-face; a few by phone. They were carried out in English or Spanish. All participants consented to participate in the study and to have the interview audio recorded. The researcher who conducted the interviews was himself a former expatriate child, which helped him to build rapport with interviewees. Initially, we asked interviewees to reflect on the situation before the move, then to comment on the stay in the host country, and finally to consider the repatriation phase (as in De Leon and McPartlin, 1995). For the pre-departure phase, relevant questions related to their feelings/fears/concerns about each move, and to their parents’ fears/concerns for their child/children. Regarding the time in the host country, questions were about the main challenges encountered and how they
overcame them, as well as about any perceived changes in their parents’ behavior. We also addressed their experiences at school and with their friends. Regarding repatriation, when applicable, we asked about their feelings concerning relocating home, and their adjustment. The semi-structured interview guideline enabled us, when interviewees were not themselves addressing certain areas or topics, to ask about these specifically, it made the interviews comparable, but also flexible enough to probe more deeply into interesting issues brought up by participants. There was no need to adjust the interview guide for the two younger participants (aged 14 and 17), since they understood the questions adequately. All interviews were recorded digitally, transcribed and translated into English (when necessary), giving us 242 pages of single-spaced transcript text.

We uploaded the transcripts to Atlas.ti for further analysis. We used thematic analysis, a data analysis technique that combines deductive and inductive elements; this is commonly used in qualitative data analysis (Fereday and Muir-Cochrane, 2006; Miles and Huberman, 1994; see also examples from recent expatriate research: Mutter, 2017; Kierner, 2018). We used insights from different theoretical backgrounds (e.g. identity theory transformation, expatriate adjustment theories, research on expatriate children) in order not to neglect any factors already discussed in published studies; iteratively, we let codes emerge from the data (Glaser and Strauss, 1967).

To be specific, one author analyzed seven interviews to establish an initial set of codes. This set contained codes guided by existing research, such as “international experience” or “cultural distance” (e.g. Black et al., 1991; Weeks et al., 2010), and codes that emerged from the interviews such as “harder academic level,” “school language fluency” and “academic system differences.” Two authors then coded all interviews independently, before comparing the coded documents and discussing different coding of text parts. After agreeing on a shared interpretation, this discussion resulted in the introduction of new codes such as “housing location” and “academic self-efficacy.” Additionally, two authors analyzed the interviews to better define what adjustment meant for expatriate children. The following sections describe how the interviews enabled us to define expatriate children adjustment and to identify the factors affecting it.

Findings: defining the adjustment of expatriate children

Expatriate adjustment to host countries has typically been subcategorized into work adjustment, interaction adjustment and cultural adjustment (Black and Stephens, 1989). To understand what adjustment meant for the expatriate children, two authors read the interviews and noted all accounts where interviewees described how they adjusted. These accounts were subcategorized into interaction adjustment, academic (rather than work) adjustment and cultural adjustment, with academic adjustment emerging inductively from our data. One important finding of this analysis is that interaction adjustment (i.e. making friends) was, by far, the most relevant aspect of adjustment for children of expatriates. One interviewee summarizes this well, recalling that her biggest fear was “to be a complete and total social outcast” in the foreign country. For some of them, who were mostly surrounded by other expatriates (because they attended an international school and/or lived in an expatriate neighborhood), interaction with other international children was very important, in addition to interaction with host nationals. Some accounts revealed how these new relationships triggered identity changes in them. To illustrate this, some recall how these new friendships activated a kind of “international identity” in them, as a Spanish girl describes:

It helped me a lot to go to an international school, because all children we were all in the same situation, they are all super nice, because everyone has to make friends quickly, everybody is used to change; then you feel much better, you feel at home (emphasis ours).

The second significant aspect was academic adjustment. Changes in the academic system when moving, and the different academic level in the host country school compared to
### Table I.
Home and host countries of interview and survey respondents

#### Interview respondents (n = 36)

<table>
<thead>
<tr>
<th>Country of origin</th>
<th>%</th>
<th>Host country</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>2.5</td>
<td>Austria</td>
<td>1.5</td>
</tr>
<tr>
<td>France</td>
<td>15.0</td>
<td>Belgium</td>
<td>4.6</td>
</tr>
<tr>
<td>Germany</td>
<td>5.0</td>
<td>Finland</td>
<td>0.8</td>
</tr>
<tr>
<td>Italy</td>
<td>2.5</td>
<td>France</td>
<td>7.6</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>2.5</td>
<td>Germany</td>
<td>6.1</td>
</tr>
<tr>
<td>Portugal</td>
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<td>Luxembourg</td>
<td>1.5</td>
</tr>
<tr>
<td>Russia</td>
<td>2.5</td>
<td>Russia</td>
<td>0.8</td>
</tr>
<tr>
<td>Serbia</td>
<td>2.5</td>
<td>Spain</td>
<td>19.8</td>
</tr>
<tr>
<td>Spain</td>
<td>32.5</td>
<td>Sweden</td>
<td>0.8</td>
</tr>
<tr>
<td>UK</td>
<td>5.0</td>
<td>Switzerland</td>
<td>4.6</td>
</tr>
<tr>
<td>Total Europe</td>
<td>72.5</td>
<td>Turkey</td>
<td>0.8</td>
</tr>
<tr>
<td>Canada</td>
<td>2.5</td>
<td>UK</td>
<td>6.9</td>
</tr>
<tr>
<td>USA</td>
<td>2.5</td>
<td>Total Europe</td>
<td>55.7</td>
</tr>
<tr>
<td>Total North America</td>
<td>5.0</td>
<td>Canada</td>
<td>0.8</td>
</tr>
<tr>
<td>Argentina</td>
<td>7.5</td>
<td>Costa Rica</td>
<td>0.8</td>
</tr>
<tr>
<td>Columbia</td>
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<td>Dominican Republic</td>
<td>0.8</td>
</tr>
<tr>
<td>Ecuador</td>
<td>2.5</td>
<td>Panama</td>
<td>1.5</td>
</tr>
<tr>
<td>Peru</td>
<td>5.0</td>
<td>USA</td>
<td>6.9</td>
</tr>
<tr>
<td>Venezuela</td>
<td>2.5</td>
<td>Total North America</td>
<td>10.7</td>
</tr>
<tr>
<td>Total South America</td>
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<tr>
<td>Australia</td>
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<td>Brazil</td>
<td>1.5</td>
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<tr>
<td></td>
<td></td>
<td>Chile</td>
<td>1.5</td>
</tr>
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<td></td>
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<td>Mexico</td>
<td>4.6</td>
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<td></td>
<td></td>
<td>Peru</td>
<td>2.3</td>
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<td></td>
<td>Trinidad and Tobago</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Venezuela</td>
<td>3.1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Total South America</td>
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</tr>
<tr>
<td>China</td>
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<td></td>
</tr>
<tr>
<td>Hong Kong</td>
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<td></td>
</tr>
<tr>
<td>India</td>
<td>0.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Indonesia</td>
<td>3.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Malaysia</td>
<td>1.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Philippines</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Singapore</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Thailand</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>United Arab</td>
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<td>Emirates</td>
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</tr>
<tr>
<td>Vietnam</td>
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<td></td>
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</tr>
<tr>
<td>Total Asia</td>
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<td>Egypt</td>
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<tr>
<td>Ivory Coast</td>
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<td></td>
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<tr>
<td>Tanzania</td>
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<td></td>
<td></td>
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<tr>
<td>Uganda</td>
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<td></td>
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</tr>
<tr>
<td>Zimbabwe</td>
<td>0.8</td>
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</tr>
<tr>
<td>Total Africa</td>
<td>5.3</td>
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</tr>
<tr>
<td>Australia</td>
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</tr>
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</table>

#### Survey respondents (n = 261)

<table>
<thead>
<tr>
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<th>%</th>
<th>Country of origin</th>
<th>%</th>
<th>Host country</th>
<th>%</th>
<th>Host country</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>0.6</td>
<td>China</td>
<td>0.3</td>
<td>Belarus</td>
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<td>China</td>
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</tr>
<tr>
<td>Belarus</td>
<td>0.6</td>
<td>India</td>
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<td>Belgium</td>
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<td>India</td>
<td>0.4</td>
</tr>
<tr>
<td>Belgium</td>
<td>2.2</td>
<td>Israel</td>
<td>0.3</td>
<td>France</td>
<td>2.3</td>
<td>Indonesia</td>
<td>0.4</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>0.6</td>
<td>Lebanon</td>
<td>0.6</td>
<td>Germany</td>
<td>2.7</td>
<td>Israel</td>
<td>0.4</td>
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<tr>
<td>Croatia</td>
<td>0.3</td>
<td>Malaysia</td>
<td>0.3</td>
<td>Italy</td>
<td>0.8</td>
<td>Japan</td>
<td>0.4</td>
</tr>
</tbody>
</table>

*Children of expatriates*
previous schools, were the two main aspects mentioned regarding academic adjustment. Cultural adjustment was also mentioned, but more sporadically. Data suggest that small cultural distances may not trigger identity changes, as a French/Canadian girl describes:

> European countries and Mexico [...] I mean, they are different, but not that different; it's not as if I moved to India, or Saudi Arabia, where culture is completely different: then I would have to adapt, and maybe not do some stuff. But here *I was myself* throughout all the countries. (emphasis ours).

Table II shows some additional interview quotes that illustrate expatriate children’s adjustment experiences and their antecedents. These antecedents are described in the following section.

### Table I

<table>
<thead>
<tr>
<th>Country of origin</th>
<th>%</th>
<th>Country of origin</th>
<th>%</th>
<th>Host country</th>
<th>%</th>
<th>Host country</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Czech Republic</td>
<td>0.8</td>
<td>Philippines</td>
<td>1.1</td>
<td>Luxembourg</td>
<td>0.4</td>
<td>Jordan</td>
<td>0.4</td>
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Adjustment dimensions

Interaction adjustment
In Peru, I think my main difficulty was finding [...] you know, everyone is in a group, so just like finding your right group. There was a group of American girls, but I’m not really American, and all their dads worked in embassies and my dad doesn’t work in an embassy, so it took me a really long time to find a group. It wasn’t until new girls moved in and there were other TCKs that I actually had one. So, I had to wait to get my own TCK group.

[Being an “international German” helped to] fit in better, because I think a lot more about the ideas, so I think a lot more about what makes my German values, and what are my German values, and so on. So, in that sense, yes, because I think a lot more about it because I observe and I have to say: “Okay, how am I going to fit in?” and things like that.

Academic adjustment
And also, then, when we moved to China, I moved in my senior year. I was doing the IB, so that was two years, and I moved halfway through. So, the fear was like [...] what was I supposed to do with that?

Well it also happened that, it is in the southern hemisphere, then academically I did finish one year [...] but I did not really start the next one and also [...] No, it was difficult, it was very difficult. I think the change affected me a lot, that is, the “goodbye friends,” the whole education system so to say also changed, and speaking French all the time, because at home I have always spoken Spanish.

Cultural adjustment
And then, super strict, super religious, and I was used to all the religions in the world.

And suddenly they told me: “No, the only truth is catholicism, your friends were wrong.” This was a shock, that everyone was from the same place, and I said: “No, I come from Indonesia.” And they told me: “Where is that?” Mental shock, that maybe me at 9 I already knew much of the world. And then, that was at the beginning [...] “Wow, how different is this?” but then I said... I mean, I thought that I was not moving again and I said: “Well, I have to stay here.” And at the end, I did integrate, but I always was the asiatic, the Chinese.

Antecedents to adjustment

International experience
And then, after that, when my parents moved, there was no fear anymore; not once did I have fear, because I was used to it at that point. And especially, for example, for the move to Tanzania, it was routine. I was really tired of traveling, and they wanted to stop in order to live in France for a while, which is my home country.

Language fluency
Well, to integrate in China without knowing Mandarin is really complicated, except if you talk to other children who speak English. Then, the friends I made there, most of them, well, all of them, spoke English, of course. And most were internationals.

Leaving friends behind
When I moved to Switzerland I was really sad, because it was that age when you are a kid and you have all your friends; it was the first time I was conscious that I was moving away. And, also, leaving my friends, having to graduate with people I just met [...] Especially because in Indonesia I had lived for six years, so I was already part of the school, and now I was going to be the new kid in senior year.

Age at the time of the move
Probably as I got older that’s when it started. At younger ages, it doesn’t matter, you mix with anyone, they come, they go, it doesn’t matter. As a teenager, that’s when you start building bonds with others.

During the first moves, I did not realize much because I was very young. But from a certain age onwards, maybe from 11 or 10 years old, changing countries made me anxious; it was problematic. I am shyer, maybe, than my siblings, and I worried about not fitting in. It was hard to change schools, to change friends, and to changing everything! For me it was hard to change countries.

I don’t know [...] common things like that, looking for a common identity. I think that is one of the most important things, because once you start going into puberty, and especially afterwards, you start looking for an identity. And finding that identity sometimes is really hard; like at the beginning of the interview, like you said: “You look like a Peruvian,” and then: what are you? Am I a Peruvian, am I a German? But the country where I lived for the most years in one beat was actually in the US. And it becomes more and more complicated.

Table II.
Quotes from the interviews

(continued)
Findings: factors that influence adjustment

Based on expatriate children’s identity formation, with insights from the interviews and from prior studies, several factors that influence the adjustment of expatriate children were identified. Following Black et al. (1991), these predictors of adjustment were organized into anticipatory factors and in-country factors.

Anticipatory factors. These are pre-departure expectations and preparations for an upcoming adjustment (Bhaskar-Shrinivas et al., 2005). We identified four such factors.

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<th>Factors</th>
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<td>Social self-efficacy</td>
<td>Being an expatriate, I had an open mind, and I spoke the language, so no barrier for that. And it was just a matter of me personally, even if I stayed in the country forever, it’s just about you up going and getting to meet people, to make some friends. In Switzerland, I don’t know, I think I learned to get out of my comfort zone more. I learned that I couldn’t just wait for people to come to me; it was like I really had to go to people. Also, I had to […] not re-learn, but learn how to socialize in that context, because I think it was very different.</td>
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<td>Academic self-efficacy</td>
<td>And then, in Malaysia, I remember also when I was younger I was really perfectionist when I wrote, so I was really slow. And I remember in a French school it’s really, really common for teachers to dictate and you have to write, and I was always really late […] They dictate. I was terrified of that. And I remember going, and I remember telling my mom: “Can you please tell the teacher that I have issues, and that I’m slow?”; and I was just really scared. And yes, I started really doing something. And check this, and this is only because of my pride, I know, but with only 14 years, at school, in secondary school, they called me the walking dictionary. I mean, we are talking at that level, I said: “Are you going to make fun of my language? I know it. You will see.” And then in English and literature I was one of the best.</td>
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<td>International school</td>
<td>The second time, Egypt-London […] in London it was a super international school, so it was used to students moving every three years. It wasn’t very challenging, because everybody had lived my lifestyle. I mean, Indonesia was more, for me, where I […] this is gonna sound so cheesy, but, where I found myself, in a way. Like it was more of a self-exploration, I guess. Like I didn’t have any issues with going out with people, but I think that also being in the international environment made me figure out who I was, in a way.</td>
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<td>Academic system differences</td>
<td>No, it was difficult that there was different scholar systems. Then, of course, sometimes I have arrived to a place where they were too advanced in Mathematics, or in English […] And of course, the English I could overcome it, but the Mathematics, no</td>
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<td>Harder academic level</td>
<td>So, the biggest challenge for me when I arrived in Finland was to change from the GCSE [General Certificate of Secondary Education, education system in England] to the IB [International Baccalaureate]. All the things I had done so far were nowhere close to the level the IB was at. And I came in in 9th grade and that’s the beginning of high school and I was struggling to get to the level.</td>
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<td>Family support</td>
<td>They support us a lot in that sense, but I think they push us too. In the moment you said “Mom, I cannot. This is horrible. I’m having a terrible time.” Yes. Then, it is also like “You can.” They help us with the homework; they push you to be able to go […]</td>
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<td>Cultural distance</td>
<td>I think there was as well the change of religion; I mean, it wasn’t as much of a challenge as it was a culture shock. And when we first moved, we had no idea about mosques or anything, so […] this is a country where you get the prayer singing at four in the morning, so people pray at home. We woke up the first night at four in the morning […]</td>
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<td>Housing location</td>
<td>In Indonesia it was difficult to get integrated, because for example I lived in a compound. Yes, in a zone for foreigners. I could not get integrated in the country, I mean in that sense. But the fact of living in the compound, helped me a lot, living there, that we could walk all around. It helped me to get integrated in that sense, because obviously outside you couldn’t</td>
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Table II.
International experience. The interviews and research (De Leon and McPartlin, 1995) reflect the fact that previous international experience facilitates adjustment. When explaining their international experience, in about 80 percent of the instances, interviewees described that having moved before made subsequent moves easier, as they knew what to expect; for some, moving became normal or even routine, as a French interviewee who had moved seven times before turning 18 commented, “Because since I was born I moved every three years. Then, for me it was like: ‘OK, normal.’” Those with international experience have already changed peer groups once (or several times) and they understand better what that means. They get used to these changes, which facilitates their adjustment. However, it is worth noting that there was some ambivalence; some of the interviewees who had moved extensively became “tired” of moving and having to integrate again. Challenges to their identity formation when relocating may be related to this, as a German interviewee who moved five times illustrates:

[...] every single move became more and more difficult, because your identity dilutes more and more. I mean, coming out of the US and going back to Germany, I wasn’t the German that went to the US, but with Peruvian roots, and so on. And it became more and more diluted, and that was definitely a thing, because you get used to the role you take up in the new environment, and then every single time you move parts of that identity break off, and then others come together; it’s sort of like a weird bionic car or something [...]

Language fluency. Many studies about expatriation highlight the importance of language skills (e.g. Shaffer et al., 1999; Hechanova et al., 2003; Haslberger and Brewster, 2008). Our interviewees described that having language skills facilitated their adjustment. In contrast, not speaking the host country language posed great difficulties for adjustment. In some cases, especially for international schools, the host country language and the language of instruction at school differed; this had varying consequences, from not being able to make friends (local or international), to not being able to follow classes at school. Having to learn new languages was a challenge, which a Spanish participant described as changing him somewhat:

[...] but there in the US I remember at 6 years old I was in class and I did not understand anything. You need to put a lot of effort to overcome this [...] it does affect you the fact of having moved so young to a country you do not know; it might make you mature more, or even think that you had a hard time over there.

Difficulty in leaving friends behind. For all children, but more so for adolescents, peer groups and friendships are especially important in the development of their social identity and self-esteem (Tarrant, 2002). On moving, expatriate children lose touch with referent (peer) groups in the home country, who were shaping their identification up till then (Erikson, 1968). That loss is very disturbing. Expatriate teenagers in Weeks et al. (2010) were concerned most of all about losing friends. In total, 22 (out of 36) interviewees spoke spontaneously about leaving friends behind; 86 percent of them recall that as one of the most difficult issues they had to face. They used descriptions such as “it was very painful to say goodbye to the friends” (participant who moved at nine years old).

Age at the time of the move. According to Tajfel (1982), social identification is enhanced by the value that individuals attach to the groups they belong to. Of course, international relocation implies changes in peer groups. Adolescents value their peer groups more than infants do (Jenkins, 2008). Identification will therefore be more challenging for adolescents; hence their adjustment will be more complex. One third of participants recall that the experience of moving was different depending on their age. They described how at a very young age they did not mind the move much, as they...
were unable to understand its implications, and friendships were less important for them. However, from approximately 10 years old onwards, moving became harder, especially because friendships left behind were now generally stronger and new friendships became harder to establish: “During the move from Chile to France I was 13 years old; and of course at that time I had my group of friends and of course, the change was much more difficult”.

**H1.** The adjustment of expatriate children is related positively to (a) their prior international experiences and to (b) their host country and school language fluency, and negatively to (c) their difficulty in leaving their friends behind and to (d) their age.

In-country adjustment factors have been subcategorized into individual, academic and non-academic.

**Individual in-country adjustment.** This refers to personal requirements for effectiveness in a foreign environment (Bhaskar-Shrinivas *et al.*, 2005). We identified two such factors.

**Social self-efficacy.** Research has found that social skills help expatriates (Black *et al.*, 1991) and their spouses (Shaffer and Harrison, 2001) to adjust. This interviewee illustrates how overcoming the challenge of making new friends shaped her:

I remember my first day at class and going around to meet people, and like […] all the Spanish people came together, so they all spoke Spanish in their group; all the Russians flew in together, and they were all with themselves. So, I just found myself really alone, so I had to go up to every group and find similarities, and find things to bond with. I think that, from being alone, that really pushed me to have to make a change.

Of course, some participants had stronger social skills; others were shyer. The former integrated new peer groups rather quickly, which supported their identity formation (Erikson, 1968). Adjustment was easier for them.

**Academic self-efficacy.** Academic self-efficacy (i.e. individuals’ belief in their own academic performance) and academic performance are related (Gong and Fan, 2006). It will be easier for stronger academic performers to meet the requirements of the host country school. Hence, adjustment will be easier for them. A Portuguese/Luxembourger interviewee describes how her move from Switzerland to Malaysia (at 7) helped her build academic self-efficacy, which aided in her subsequent moves:

That, actually, I say that a lot, kind of shaped my work ethic, because I think that once you’re in an environment where you are literally the underdog […] like, I had no idea how to do things, so I had to kind of rely on myself, and that helped academically. So I don’t know, I just worked really, really hard, and I learned to ask for help around me.

**H2.** The adjustment of expatriate children is positively related to their (a) social self-efficacy and their (b) academic self-efficacy.

**Academic in-country adjustment.** The interviews revealed that experiences at and with schools and school systems were relevant for adjustment.

International school. The type of school attended, international or local, influences the experiences of expatriate children (Haslberger and Brewster, 2008; Weeks *et al.*, 2010). Interviewees found it much easier to make friends at schools with a high percentage of international students, because other internationals shared the experience of moving, were sometimes new at school, had an international background, felt the pressing need to make new friends and were therefore more accepting and open to new friendships. Additionally, children attending schools with a high percentage of international students will most likely be less exposed to the local culture. This may trigger fewer identity changes associated with integrating in the host culture. Adjustment should be easier for them.
Academic system differences. In total, 11 participants mentioned that differences in academic systems inhibited their adjustment. They explained that subjects might be taken in different academic years in different countries; some subjects are also taught and evaluated differently.

Harder academic level. The interviews illustrate that when the academic level of the host country school was harder than that of the previous school, adjustment was more difficult.

H3. The adjustment of expatriate children is positively related to (a) attending an international school, and negatively to (b) academic system differences between the host country school and their previous school and to (c) a harder academic level in the host country school.

Non-academic adjustment. In total, three non-academic factors that influence expatriate children's in-country adjustment were identified.

Family support. The interviews reveal how family support enhanced children's adjustment. In 64 percent of comments about parents, children considered them supportive, especially when they shared their enthusiasm about moving, or when they motivated them to take language classes, helped with schoolwork, and encouraged them in times of difficulties. However, in 36 percent of cases parents were described as less supportive when they were too concerned about safety, and/or limited children's freedom to go out. On some occasions, though, these concerns were related to the political instability of the host countries.

Cultural distance. This is the distance between the home and the host country's culture (Mendenhall and Oddou, 1985). Research on expatriates has revealed that small cultural distances trigger small identity changes (Kohonen, 2008). Adjustment would be easier in these cases, and this was confirmed by interviewees. They pointed out that similar cultures facilitated adjustment, whereas those who moved to culturally distant countries experienced disorientation, losing confidence about how to behave appropriately.

Housing location. According to the interviews and to previous research (Weeks et al., 2010), residential compounds for internationals enable interaction mainly with expatriate kids. Interviewees living in local neighborhoods became immersed more easily in the local community.

H4. The adjustment of expatriate children is positively related to (a) the support given by their family, and negatively to (b) the cultural differences between the host and home countries and to (c) the location of their accommodation.

The factors described above were considered the most significant antecedents of the adjustment of expatriate children. Figure 1 shows the model.

Study 2: empirical test of the antecedents of adjustment

Sample
The second study consisted in developing, distributing and analyzing a survey, distributed in 2018. Respondents were former expatriate children (along with a few who were still so). To participate they had to have moved to at least one foreign country because of their parents' work when they were adolescents (between 10 and 18 years old). In total, 266 people responded, which corresponds to a 79 percent response rate. We removed five respondents because they did not fit the study requirements (e.g. they were less than 10 years old when they moved); sample size was thus reduced to 261. Before launching the survey, 11 people tested its comprehensibility, format and response time. Following their suggestions, several small changes were made. Because some subjects had moved to several foreign countries as children, we asked respondents to evaluate their last move to a foreign country.

The survey was conducted online and was distributed mainly by e-mail among undergraduate students at our university, and among other contacts. It was anonymous. Of the
261 respondents, 8 were expatriate children and still so; the rest were former expatriate children, although quite young, as noted below. An informed consent form was signed electronically before answering the questions. We sent a reminder e-mail after two weeks to most people contacted by e-mail, and issued another reminder announcing the closing of the survey.

**Measures**

**Dependent variable.** Adjustment. Interaction adjustment and cultural adjustment were measured using the most common expatriate adjustment scales [Black, 1988; Black and Stephens, 1989]. In total, four items measured interaction adjustment, two of them adapted from Black and Stephens [1989]. We asked how adjusted the expatriates were regarding “Making friends with host nationals” and concerning “Interacting with host nationals on a day-to-day basis” while in the host country. Because some children are in contact mostly with other international kids, we asked these same two questions, but substituting “host nationals” with “international kids.” Cultural adjustment was measured using three items of the Black and Stephens [1989] cultural adjustment scale that were most relevant for expatriate children. We asked them how adjusted they were to “Living conditions in general,” to “Housing conditions” and to “Entertainment/recreation facilities and opportunities.” The questionnaire also measured how they adapted to school. Academic adjustment was assessed using two items, one adapted from Gong and Fan [2006]. This asked how adjusted they were to the academic requirements of their host country school. A second item was derived mostly from analyzing the interviews; it asked how adjusted they were to the academic system in their host country school. Responses to these nine items were scaled using seven-point Likert scales from very unadjusted (1) to very adjusted (7). An exploratory factor analysis conducted on the nine items rendered a four-factor solution made up of: adjustment to interaction with host country nationals (two items), adjustment to interaction with internationals (two items), academic adjustment (two items) and cultural adjustment (three items). All items were salient, as factor loadings ranged between 0.63 and 0.89, and cross-loadings were very close to zero [Brown, 2006, p. 30]. Several methods were used to decide upon the number of factors retained: the interpretability of the factors, the scree plot, the Kaiser criterion, the parallel test, and the goodness-of-fit statistics of different solutions.
Oblique rotation was used, as we suspected factors could correlate. Their correlations ranged from 0.23 to 0.46. A confirmatory factor analysis (CFA) was conducted on the four-factor solution, and its goodness of fit was adequate (RMSEA = 0.07; CFI = 0.98; TLI = 0.96; SRMR = 0.03), and better than other solutions tested. For the statistical analyses, the average of the items contained in each of the four factors was employed.

**Independent variables.** International experience. This was measured using the number of years respondents have spent in foreign countries, and the number of moves made to foreign countries (as in Takeuchi et al., 2005), from birth until 18.

Language fluency. Respondents listed the main languages they spoke before moving to the host country, and also their fluency in those languages before the move (e.g. poor, average) (Shaffer and Harrison, 2001). Their responses were coded regarding their fluency in three languages: that spoken in the host country, that spoken by the teachers in the classroom, and that spoken by their classmates. These values were used in the analyses: 1 (language not listed by respondents), 2 (poor), 3 (average), 4 (good), 5 (very good).

Difficulty in leaving friends. Respondents reported how hard it was for them to leave their friends behind when they moved. Responses were anchored from 1 (very easy) to 5 (very difficult).

Age when moving. It corresponds to their age when they moved to the host country.

Social self-efficacy. In total, three items of the six-item (Sherer et al., 1982) scale were used to measure this. An example item is: “It is easy for me to make new friends.” Responses score from 1 (strongly disagree) to 5 (strongly agree). The average of the three items was used in the analyses.

Academic self-efficacy. Because academic self-efficacy has been found to correlate with academic performance (Gong and Fan, 2006), and also because respondents (most being former expatriate children) may have difficulties recalling their academic self-efficacy while in the foreign country, we proxied academic self-efficacy. We asked them to report their average grade during their last four years of school (generally from 14 to 18 years old). Their responses were scored: 1 (E, fail), 2 (D, poor), 3 (C, fair), 4 (B, good) and 5 (A, excellent).

International school. To assess how international the host country school was, the survey asked respondents to report the percentage of students that were foreigners. Responses are ordered as follows: 1 (0–25 percent), 2 (26–50 percent), 3 (51–75 percent) and 4 (76–100 percent).

Academic system differences. Respondents rated how different the academic system in the host country school was from the one in the previous country they lived in. Responses were scaled from 1 (very similar) to 4 (very different).

Harder academic level. Respondents assessed the extent to which the academic level was harder in the host country compared to that in the previous country they lived in. Responses ranged from 1 (much easier in the host country) to 5 (much harder in the host country).

Family support. This is assessed using three items of the eight-item family support subscale of the social support appraisals scale (Vaux et al., 1986). It measured the extent to which respondents agreed on the statements being true while they were in the host country. An example item reads: “I could rely on my family for support.” Responses score from 1 (strongly disagree) to 4 (strongly agree). The analyses used the average of these three items.

Cultural distance. Following recommendations (Tarique and Weisbord, 2013), cultural distance between the home and the host country was measured objectively (as in Sarala and Vaara, 2010). Dissimilarities in key cultural dimensions were used. We first used the most recent large study on cultural differences between countries, i.e., the Globe project (House et al., 2004), extracting the practices scores of its nine cultural dimensions. Because this project lacked measures of national culture in several countries we were interested in, we completed this variable using the Hofstede (1980)
study on cultural differences; it is the first comprehensive study on differences between national cultures. This first study was replicated and subsequently extended (Hofstede et al., 2010). For the present research, the Globe project scores were used when available; otherwise the Hofstede scores were employed, published on their official website (www.hofstede-insights.com/product/compar...country/), and accessed on April 16, 2018. Following other research (e.g. Dupuis et al., 2008), the Kogut and Singh’s (1988) formula was used to measure the cultural distance between the home and host country of the respondents:

\[ CD_{jf} = \sum_{i=1}^{n} \left\{ \frac{(I_{ij} - I_{if})^2}{V_i} \right\} \]

where \( CD_{jf} \) = cultural distance between country \( j \) and country \( f \), \( I_{ij} \) and \( I_{if} \) = score for \( i^{th} \) cultural dimension in countries \( j \) and \( f \), respectively; \( V_i \) = variance of the \( i^{th} \) dimension; \( n \) = number of cultural dimensions available.

Housing location. It takes 0 if the expatriate child lived in an international neighborhood and 1 if in a local one.

Control variables. Gender. 0 corresponds to men and 1 to women.

Length of stay. It is included as a control, because expatriate research has found that when expatriates stay longer in the host country, they are better-adjusted (Takeuchi et al., 2005). This is calculated as their age when they left the host country minus their age on arrival in the host country.

Results
Survey respondents originate from 72 different countries and they moved to 58 different host countries. All continents are represented, except Antarctica (see Table I). Moreover, respondents had strong international experience; they reported having lived in foreign countries for about nine years on average, and having moved to foreign countries 2.5 times, on average, from birth until 18. In total, 63 percent of respondents were females, and 31 percent lived in international neighborhoods. Descriptive statistics are shown in Table III. It is noteworthy that expatriate children adjust quite well to the host countries. The four adjustment dimensions range from 5.55 (adjustment to interaction with locals) to 6.58 (adjustment to interaction with internationals) on seven-point scales.

Because six variables used multi-item scales (interaction with locals adjustment, interaction with internationals adjustment, academic adjustment, cultural adjustment, family support and social self-efficacy), a CFA with all the indicators that define these variables was conducted. The six-factor solution had high factor loadings (standardized values ranged from 0.61 to 0.93), and an adequate goodness of fit (RMSEA = 0.04; CFI = 0.98; TLI = 0.97; SRMR = 0.03).

Hypotheses were tested by regressing each of the four adjustment dimensions on all factors hypothesized as potentially affecting adjustment, and two controls: gender and length of stay. Because the squared terms of some predictors were introduced in the regressions, we centered all continuous predictors. Results are shown in Table IV. Significant predictors related to interaction with host nationals’ adjustment were: fluency in the host country language (\( \beta = 0.23, p < 0.01 \)), social self-efficacy (\( \beta = 0.28, p < 0.001 \)), percentage of international students at school (\( \beta = -0.16, p < 0.05 \)) and cultural distance (\( \beta = -0.14, p < 0.05 \)). Thus, concerning the adjustment to interaction with locals, \( H1b, H2a, H3a \) and \( H4b \) are supported.

Predictors that were significantly related to adjustment with internationals were: number of years lived in foreign countries (\( \beta = -0.19, p < 0.05 \)), social self-efficacy (\( \beta = -0.16, p < 0.05 \)) and percentage of international students at school (\( \beta = -0.16, p < 0.05 \)). Because the dependent variable was reflected (here 7 = very
<table>
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<th>Variable</th>
<th>Mean</th>
<th>SD</th>
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<th>2</th>
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<th>5</th>
<th>6</th>
<th>7</th>
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<td>0.35*</td>
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<td>0.21*</td>
<td>0.01</td>
<td>0.07</td>
<td>0.14*</td>
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<td>0.12*</td>
<td>-0.24*</td>
<td>0.09</td>
<td>0.17*</td>
<td>0.13*</td>
<td>0.08</td>
<td>0.07</td>
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<td>0.65</td>
<td>0.08</td>
<td>-0.03</td>
<td>0.14*</td>
<td>0.11</td>
<td>0.20*</td>
<td>-0.15*</td>
<td>0.01</td>
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<td>-0.13*</td>
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<td>18. Cultural distance</td>
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<td>0.00</td>
<td>0.01</td>
<td>0.04</td>
<td>0.07</td>
<td>-0.17*</td>
<td>0.03</td>
<td>0.04</td>
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<td>19. Local neighborhood</td>
<td>0.89</td>
<td>0.46</td>
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<td>-0.05</td>
<td>-0.07</td>
<td>-0.04</td>
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<td>0.07</td>
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<td>20. Female</td>
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<td>21. Length of stay</td>
<td>3.82</td>
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<td>0.13*</td>
<td>0.11</td>
<td>0.20*</td>
<td>-0.15*</td>
<td>0.01</td>
<td>-0.06</td>
<td>-0.13*</td>
</tr>
</tbody>
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Notes: *α reliabilities of multi-item scales are in parentheses. *p < 0.05

Table III. Descriptive statistics

Children of expatriates
Predictors that were statistically significant in the regression predicting academic adjustment were: academic self-efficacy ($\beta = 0.16, p < 0.01$), harder academic level in the host country school ($\beta = -0.28, p < 0.001$) and family support ($\beta = 0.25, p < 0.01$). Thus, supported hypotheses regarding academic adjustment were $H2b, H3c$ and $H4a$.

Significant predictors related to cultural adjustment were: number of moves to foreign countries ($\beta_{linear\ term} = 0.08, ns; \beta_{squared\ term} = 0.14, p < 0.05$), social self-efficacy ($\beta = 0.16, p < 0.05$) and family support ($\beta = 0.18, p < 0.05$). Therefore, regarding cultural adjustment, $H1a, H2a$ and $H4a$ were supported.

As per the controls, gender was unrelated to the four dimensions of adjustment. Length of stay was related to the adjustment to interacting with locals, forming a U-shape, and was unrelated to the other three dimensions of adjustment.

Robustness checks
Because such international experiences are quite salient in people’s lives, we believe that even though most respondents are former expatriate children, they are likely to recall their experience well. Moreover, the time span between their international experience and the survey is not long. In total, 75 percent of the subjects were 18–22 years old when they took the survey; 97 percent were 30 or less. Furthermore, the regressions were tested by including

<table>
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<th>Predictors</th>
<th>$\beta$</th>
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<tr>
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<td>1.14</td>
<td>-0.19**</td>
<td>-2.35</td>
<td>0.10</td>
<td>1.08</td>
<td>-0.12</td>
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<td>Years in foreign countries squared</td>
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<td></td>
<td></td>
<td>0.16</td>
<td>1.97</td>
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<tr>
<td>Moves to foreign countries</td>
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<td>0.04</td>
<td>0.44</td>
<td>-0.12</td>
<td>-1.36</td>
<td>0.08</td>
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<td>1.74</td>
<td></td>
<td></td>
<td>0.14*</td>
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<tr>
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<td>0.23**</td>
<td>2.87</td>
<td>-0.04</td>
<td>-0.62</td>
<td>0.00</td>
<td>0.07</td>
<td>0.04</td>
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<td>Social self-efficacy</td>
<td>0.28***</td>
<td>4.00</td>
<td>-0.16*</td>
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<td>0.94</td>
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<td>-0.16*</td>
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Table IV. OLS regressions predicting adjustment

Notes: Standardized coefficients and $t$-values are shown. Robust standard errors are used because the null hypothesis of constant variance of the errors was rejected. Continuous regressors are centered. *$p < 0.05$; **$p < 0.01$; ***$p < 0.001$
respondents’ age at the time of the survey. This predictor was non-significant, and its inclusion did not change the reported results. A dummy was also created. It took the value of 1 if the respondent was an expatriate when the survey was carried out (eight people were), and 0 if he/she was a former expatriate. Once more, this dummy was non-significant; its inclusion did not alter the results. These tests suggest that results are not altered because respondents were former expatriate children rather than children who are still expatriates.

Because several variables may have a non-linear relationship to adjustment (i.e. number of years lived in foreign countries, number of moves to foreign countries, age when moving and length of stay), the reported models (Table IV) were tested by including the squared terms of these variables. Moreover, because the relationship between length of stay and adjustment may include more than one curve (Black and Mendenhall, 1991), the cubic term of length of stay was also introduced. In the tabled models, higher order terms were only included when their significance was at least $p < 0.10$.

Multicollinearity is not a limitation, because the highest correlation between predictors is between age when moving and length of stay ($r = -0.70, p < 0.05$); the highest VIF is 1.67. Moreover, because a few respondents were siblings, their responses may not be independent in some of the variables. The models were thus tested using standard errors clustered on sibling. Results are the same as those reported.

Cultural distance was measured objectively, somewhat reducing common method bias. As this distance could have been perceived differently if measured subjectively, the models (Table IV) were tested by omitting this variable. Results do not change. Furthermore, the data set contains very few missing values. Cultural distance is the measure with most missing data: 12 values (4.6 percent of the data). Such a low percentage of missingness should not bias the estimation of parameters. Because cultural distance is, moreover, an objective measure, its missingness is likely to be missing completely at random (MCAR) (i.e. missingness is unrelated both to the observed variables and to cultural distance itself). When data are MCAR, using listwise deletion (as done here) should not bias the parameter estimates (Allison, 2009). Finally, the data do not contain outliers.

General discussion

Main results

An initial and relevant finding is that expatriate children adjust quite well to the host countries they move to with their families, somewhat better than their expatriate parents do (e.g. Shaffer et al., 1999). Interviewees stated that they experienced the majority of moves positively. It is also worth noting that in the surveys, measured on seven-point scales, adjustment to interaction with locals is on average 5.55, adjustment to interaction with internationals 6.58, academic adjustment 6.16 and cultural adjustment 6.33, all rather high and positive. Two of these four factors, i.e. interaction with locals and cultural adjustment, can be compared to expatriates’ adjustment. Also based on seven-point scales, expatriates’ adjustment to interaction with locals ranges approximately from 3.6 to 5.1, and cultural adjustment from 3.9 to 5.3 (Kraimer et al., 2001; Shaffer et al., 2006; Shaffer et al., 1999; Takeuchi et al., 2005). This suggests adjustment is more difficult for expatriates than for their expatriate children. This may be explained by the fact that survey respondents are adolescents, and their identity is “critically” being formed at this life stage (Erikson, 1968). Identity changes may thus be easier for them than they are for their expatriate parents. Furthermore, expatriate children interact well, both with locals and with internationals, although it seems that making friends with other international children is easier, as confirmed by the interviews and the survey.

Also concerning adjustment, interview responses suggest that when expatriate children move to a foreign destination they are mostly interested in fitting in with other children, whether locals or other internationals; interaction adjustment is highly significant for them. Academic adjustment comes second in importance; cultural adjustment seems less relevant.
Regarding the antecedents of expatriate children's adjustment, survey responses suggest some interesting results. Having prior international experience had less effect than expected; it relates to only two of the four adjustment dimensions. The number of years spent in foreign countries (from birth to 18) is positively related to expatriate children's adjustment to interaction with internationals; the number of times they move to different countries is non-linearly related to cultural adjustment (the relationship is negative at first, and positive after two moves). Similarly, for their expatriate parents, the meta-analytic reviews signal a positive, significant but weak relationship between international experience and adjustment (Bhaskar-Shrinivas et al., 2005; Hechanova et al., 2003). Moreover, language fluency before the move also has less effect than expected, similarly to their expatriate parents (Bhaskar-Shrinivas et al., 2005; Hechanova et al., 2003). Fluency in the host country language is positively associated with their adjustment to interaction with locals, but is unrelated to the other three dimensions of adjustment. Fluency in the languages used at school (by teachers or classmates) is unrelated to adjustment. This might be because respondents were quite fluent in those languages before they moved (they score around 4 on a one to five scale) and also because, once in the host country, they learned them quite quickly, "in several months," according to interviewees. They probably achieve this because of the numerous hours spent at school, the pressing willingness to make friends and their felt need to succeed academically.

Importantly, even though numerous interviewees noted that leaving friends behind was one relevant difficulty resulting from the move, the data suggest that this is unrelated to any adjustment dimension. That means that even when, prior to the move, expatriate children express difficulties in leaving friends behind, this will not necessarily affect their in-country adjustment. One reason for that finding may be this sample's strong international experience, and that they have spent, on average, 3.6 years on assignment. One former expatriate child notes that with every move, you "get used to" leaving friends behind, an idea also noted in the narratives in Pollock and Van Reken (2009). Their strong international experience has brought a certain number of interruptions to the formation of their identity. Leaving referent (peer) groups has become usual, and does not affect them as much. It is worth noting that, even though adjustment was expected to be more difficult for older children, age is unrelated to adjustment. This may be due to the restricted age range (10–18) at the time of the move. A wider range might modify the results.

As per the survey data, expatriate children's social self-efficacy is the factor that helps adjustment the most. It is positively related to interaction both with locals (strongly) and with internationals, and to cultural adjustment. It is unrelated to academic adjustment. Adolescents derive their social identity mostly from their peer groups (Erikson, 1968; Jenkins, 2008). Thus, those for whom it is easier to integrate in those groups, because of their stronger social skills, will have a clearer social identity; this might help them adjust better. Bhaskar-Shrinivas et al.'s (2005) meta-analysis finds expatriates' relational skills are also related to their cross-cultural adjustment. Regarding academic adjustment, our data suggest that it is positively related to expatriate children's academic self-efficacy (proxied using their average grade during their last four years of school), and it is negatively related to a harder academic level in the host country (compared to that of the previous school). Surprisingly, changes in academic systems, even though they are quite prevalent in the sample, are unrelated to academic adjustment.

One relevant decision that affects expatriate children is the type of school they will attend, whether international or local. The data suggest that attending school with a high percentage of internationals relates negatively to interaction with host nationals and positively to interaction with internationals, logically. It is also interesting to note that attending an international school is unrelated to academic adjustment. Academic studies do not seem to be easier in international schools than local ones. Finally, it is worth noting that it seems to be easier to make friends with internationals than with locals, as noted above.
Adding to other studies (Caligiuri et al., 1998; Van der Zee et al., 2007), the results of this study suggest that family support is positively related to academic and cultural adjustment. These significant findings might be due to family support being especially relevant for expatriate children because, as one participant illustratively recalls, while abroad “you do not have anyone else.” However, family support is unrelated to interaction adjustment. Families can help their children academically and culturally, but they cannot help them to make friends. Furthermore, even though cultural distance is generally related to expatriate adjustment (Bhaskar-Shrinivas et al., 2006; Hechanova et al., 2003), these data suggest that, for expatriate children, it is related only to interaction adjustment with locals, negatively, and it is not related to the other adjustment dimensions. Its effects are thus weaker than expected. Because 56 percent of our respondents attended schools where at least half of the students are foreigners, they may be less exposed to the local culture, and therefore less affected by cultural distance. Unexpectedly, living in a local vs an international neighborhood is unrelated to adjustment.

The contribution to theory and research of the present study is threefold. Conceptually, we have used identity theory to explain, in part, the adjustment of expatriate children. Second, we have developed an initial, rather comprehensive model of expatriate children adjustment, something which has not been done previously. The model includes some predictors previously suggested in published studies (e.g. attending an international school, difficulty in leaving friends behind, age at the time of the move) and some new ones (e.g. academic system differences, academic self-efficacy). Moreover, two new dimensions have been added to the measurement of adjustment: academic adjustment (in lieu of work adjustment, used in expatriate research), and adjustment to interacting with internationals (previous research commonly assesses adjustment to interacting with locals, but not with internationals). The third contribution has been to test the model quantitatively. The relationship of most predictors, except for social self-efficacy (Van der Zee et al., 2007), to expatriate children adjustment is tested here for the first time.

Practical implications
Even though research has found that family adjustment and expatriate adjustment are strongly related (Bhaskar-Shrinivas et al., 2005; Hechanova et al., 2003), our interviews and research (e.g. Hechanova et al., 2003; McNulty, 2015) note that most companies do not provide expatriate services for spouses or children. Such support would be helpful. As per the results of this investigation, companies could help effectively in three areas. First, they could provide host country language training for expatriate children, to help them interact better with locals. Second, they could provide counseling based on the results of this study or similar ones. They could emphasize the following: the importance of children’s relational skills for their adjustment, the aspects that influence academic adjustment (e.g. academic self-efficacy, the academic level in the host country) and those which do not (e.g. different academic systems). Additionally, they could highlight that it seems easier to make friends with other internationals than with locals, and point out that the family can help with academic and cultural adjustment, but not with friendships. Companies could draw attention to the effects of attending an international school vs a local one, or stress how much their employees’ children will value making new friends. Third and importantly, because interacting with peers was noted as the most relevant issue related to adjustment, companies could facilitate interaction with other children regularly. They could enable their staff and offspring to have contact with other families with children, or encourage employees to get together with newcomers.

Limitations and recommendations for future studies
The main recommendation for future studies that analyze the adjustment of expatriate children would be that they interview/survey children who are presently expatriates, using multi-raters within the family (as suggested by Caligiuri et al., 1998). Even though in the
present research a great effort was made to minimize potential bias associated with retrospective measures (we enhanced the validity of the measures following Miller et al.’s (1997) recommendations – e.g. making the survey anonymous, confidential, short, convenient, etc.), replications of this study examining children who are still expatriates are highly recommended. Those future studies need to take into consideration that “opinions on the success of expatriation may change over time: what seemed to be a more successful or a less successful assignment during or immediately after it may be seen differently with the benefit of hindsight” (Brewster et al., 2014). This idea was confirmed by a Spanish interviewee who, after coming back to Spain, notes “I was not happy in England, and I did not realize it until I came here.” Regarding multi-rating, future investigation needs to consider that research has found that parent/child agreement can be weak, but that there is more agreement between siblings (Hardt and Rutter, 2004). Moreover, interviewees and survey respondents in the present research came from, or went to, over 100 different countries located in all continents, which is quite substantial. However, numerous of these countries are in Europe, some in the Americas and fewer in the rest of the world. Future studies would benefit from analyzing relocations in other parts of the world. These studies would also be enhanced by refining some of the measures used in the present study and by adding new ones, as described below.

Regarding the measures used, because the objective was to test a comprehensive set of measures that might affect expatriate children adjustment, and also in order to keep the survey short, we included some shortened versions of multi-item scales (e.g. adjustment, social self-efficacy, family support) that could be further developed in future studies. In addition, to shorten the survey and to reduce common method bias, cultural distance was measured objectively. Future studies could measure it subjectively. Moreover, a finer measure of length of stay (e.g. using months instead of years) may produce more accurate results. Finally, regarding the assessment of adjustment, we suggest that future measures include adjustment to interaction with internationals, and not only adjustment to interaction with locals.

Future studies could also assess other variables that may affect expatriate children’s adjustment, especially if they are surveyed while on assignment; such factors might include personality traits or other personal characteristics (e.g. open-mindedness, curiosity, being less judgmental, willingness to try new things, flexibility, cultural intelligence, patience, prudence, creativity, openness to experience and respectfulness). Research has suggested that these variables may affect expatriate families (e.g. Shaffer and Harrison, 2001; Harvey, 1985; Tarique and Weisbord, 2013). It is more difficult to study these variables by examining mostly former expatriate children, as we do, because experiences happening after the international relocation may affect them. Other variables potentially related to expatriate children’s adjustment are: the type of parents they have (e.g. authoritarian, authoritative, permissive; Jaskiewicz et al., 2017), children’s self-efficacy or whether their parents were corporate or self-initiated expatriates (Shaffer et al., 2012; Suutari and Brewster, 2000). Moreover, future studies could also add potentially relevant controls such as the socioeconomic status of the family, or parents’ language skills.

Apart from examining children who are still expatriates and refining/adding measures, our second relevant recommendation would be to examine more deeply how the identity of expatriate children changes during international relocations, and how these identity modifications affect their adjustment. Qualitative research could help explore the phenomenon. Finally, one limitation of the present study is that it is cross-sectional; this precludes inferring causality between variables. Longitudinal studies would enable more solid statistical analyses.

Conclusion
Expatriate children are exposed to a number of changes and challenges that generally, non-expatriate children are not exposed to. They need to adjust to a new school, a new
culture, integrate with new groups of friends, using one or several new languages and they need to accomplish all these with fewer resources than non-expatriated children (e.g. without the close support of their friends back home or their extended family) (Weeks et al., 2010). Therefore, the findings of the present study are especially salient for children living abroad.

This study finds that the most relevant feature that helps their adjustment in the foreign country is making new friends, weather they are locals or internationals, although the results suggest it is easier to build relationships with other expatriated children. Moreover, data suggest that children with stronger relational skills, more academically efficient, who attend a school in the foreign country with a lower academic level than their previous school, and who receive more support from their nuclear family, adjust better. Other aspects that help adjustment but that seem to have fewer effects are their prior international experience, their fluency in the host country language and the cultural distance between their home and host countries.

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