

## **International assignments, expatriate adjustment and perceived impact of parent organization support**

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### **Key Words**

Expatriate, Adjustment, Strategic dimensions, parent company support, India

### **Abstract**

*The global economy phenomenon has given rise to relocation of people on temporary basis to countries other than their own. This set of people on international assignments is required to perform and give results in the new work set up. This has been attracting attention of researchers for last few decades. As an outcome of an extensive literature review on expatriate adjustment, the authors have identified four strategic dimensions of expatriate adjustment viz. Work Adjustment, Family Adjustment, Career Development and General Adjustment and their determinants. The objective of this paper is to assess the impact of support from parent organization on adjustment of people on international assignment. The premise is that adjustment in new surroundings is a prerequisite to desired performance. The methodology is a combination of literature survey and personal interviews. The information available in print form as well as on the official websites of companies from three sectors including software, hardware and petroleum is studied. Structured interviews of the personnel from these companies who are responsible for implementing the organizational policies for managing the expatriates are conducted to reach conclusions. As an outcome of the research a conceptual model of parent company support on adjustment in international assignments has been developed.*

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### **Introduction**

Past research indicates that expatriate adjustment enables the expatriate to perform to the best of his/her ability (Khan, et al, 2011). Expatriate Adjustment can be conceptualized as the degree of adjustment experienced by the individual or the degree of comfort, familiarity, and ease that the individual feels toward the new environment. Cultural differences exist between home and host locations and expatriates face barriers such as time, language, geography, food, and climate. In addition, peoples' values, beliefs, perceptions, and background can also be quite different. For instance, in business scenarios, the expectations for success or failure may differ, which can be very frustrating and confusing to sojourners and expatriates (Zakaria, 2000). Expatriate adjustment can also be referred to as acculturation (Mendenhall and Oddou, 1995), adaptation and adjustment (Benson, et al. 1978, Stening and Hammer, 1992). Possible reasons why expatriates return before the completion of the assignment may be homesickness, or inability to adjust to housing conditions, health care facilities, leisure activities, the job, the business environment, or the broader cultural circumstances (Bhanugopan, Fish, 2004). The growth in multinational companies, particularly in the last thirty years has resulted in an increased awareness of the use and the importance of managing expatriate personnel (Anderson, 2005).

Irene Chiotis-Leskowich (2009) has identified 12 reasons for expatriate failure, including career blockage; culture shock; lack of pre-departure cross-cultural training; over emphasis on technical qualifications; family problems; spouse dissatisfaction; inability to adapt; poor job performance; among others. To achieve the ideal fit between the expatriate managers and the new work and socio-cultural environment, the parent foreign companies need to invest more in the adjustment process of expatriates and the employees by getting their management involved in the selection, pre-departure preparation and cross-cultural training of the employees. Furthermore, they must provide continuous support to the employees throughout their assignment (Yavas and Bodur, 1999). According to Jassawalla, Truglia and Garvey (2004), effective expatriate management includes, helping expatriates manage conflict situations arising from cross-cultural differences; use emotional intelligence assessment as a vital part of selection;

enhance training content and methods to prepare expatriates interaction with host nationals; train key host nationals for collaborating with expatriates and create opportunities for lower-stress, familiarizing pre-sojourn visits.

The present paper aims to identify the strategic dimensions of adjustment of expatriates in international assignments and the influence of the parent organization on the variables of these dimensions in order to facilitate adjustment of expatriate personnel. The paper concludes with the proposition of a conceptual model developed on basis of literature and empirical findings.

## **Research Design**

The paper uses qualitative research approach and is exploratory in nature. It uses a combination of secondary and primary sources of information. The primary source of information is in-depth interview method supported by information on official websites of the companies. Qualitative, in-depth interviews typically are much more like conversations than formal events with predetermined response categories (Marshall and Rossman, 2006:121). In a comparative overview of various data collection methods, Zelditch (1962) says that interview method is most efficient and hence best form of data collection in case of Institutionalized norms and statuses (p. 575).

The objectives of this paper are, to identify strategic dimensions of expatriate adjustment and the variables of these dimensions which impact the adjustment of expatriates and secondly, to assess the role of the parent organization on these variables in order to facilitate expatriate adjustment. A set of four strategic dimensions of expatriate adjustment has been identified from the previous researches. For detailed investigation, list of key variables is prepared for each of these four dimensions. The impact of organizational intervention on strategic dimensions is assessed on basis of personal interviews with the senior executives of firms. Senior executives, from these companies, with wide experience of working in diverse international locations and also in managing expatriates, were interviewed using a semi structured interview protocol. Finally, as an outcome of the research, a model is developed to explain the process of organizational perspective on strategic dimensions of expatriate adjustment. The model is developed on basis of literature review and validated on basis of the findings of the interviews.

Here it is worth mentioning that the role of expatriate is very crucial in their adjustment but this aspect has not been dealt with here since the focus of the paper is on the role of the organization and not on the efforts by expatriates.

## **Strategic Dimensions of Expatriate adjustment**

There have been number of definitions offered for adjustment: that it concerns overcoming culture shock; that it is psychological comfort in a new setting; that it is general satisfaction with and in a new environment; and, that it is about psychological well-being and socio-cultural competence (Haslberger and Brewster, 2006). As a consequence of a detailed research review four strategic dimensions of expatriate adjustment, viz. work adjustment, general adjustment (Black and Stephens 1988, 1989), family adjustment, and career enhancement are identified along with their variables. A brief account of these variables is given here under.

## **Work Adjustment**

Work adjustment is a person's adaptation to new job tasks, work roles, and the new work environment (Palthe, 2001). The supervisors of the expatriates need to acquire a true global mindset which will enable leadership effectiveness in a global capacity and would improve one's effectiveness on the global stage (Cohen, 2010). Leaders/supervisors can provide mentoring and dispel doubts by communicating with the expats. Research by Breiden, Mohr and Mirza, (2005) stipulates that expat's task satisfaction depends upon the match between job requirement and expat's abilities, and the level of expats emotional satisfaction depends on the fit between reinforcers of the job and expat's needs. The absence of role conflicts and presence of role clarity are major antecedents for enabling expatriate work adjustment (Kittler, Rygl, Mackinnon, Wiedemann 2011). Cross-cultural training provides an opportunity to the expat

to become familiar with the host country's history, customs, and etiquettes. Hence, organizations should provide proper cross-cultural training with both high as well as low cultural novelty (Jan, 2006). Maximizing task satisfaction will likely produce expatriates who are more cooperative and willing to help the corporation be successful (Liu and Lee, 2008).

### **General Adjustment**

General adjustment refers to adjustment of the expatriate and his family in the host country culture and environment. According to Black and Gregersen (1991), individual expatriate's adjustment to working and living conditions abroad is related to such variables as expatriate background (e.g., overseas experience, pre-transfer preparation), job and personal factors. Expatriates will adapt their behaviors, norms, and values to fit in and ultimately succeed in the cross-cultural environment (Lee and Larwood, 1983).

In order to facilitate the adjustment of expatriates into the host culture and, to enhance their cross-cultural skills organizations can assist the expatriates in establishing social support systems and/or ties, by helping to establish the expatriate and his/her family within a local school, youth organization, social club, health organization etc. (Caligiuri et al., 1998). To retain the expats, employing organizations must pay particular attention to the social exchange relationships between expatriate supervisors and their expatriates prior to, during and after their international duties. This would help them to identify the existing exchange of "invisible" rewards and the expression of their reciprocal trust (Tornikoski, 2011).

### **Family Adjustment**

Researchers have indicated a significant impact of family adjustment on expatriate adjustment. This adjustment can be achieved by imparting pre-departure and post-arrival training on host country's culture (Adler, 1991). To address the problem faced by dual-career couples, organizations must try to find solutions such as arranging for a job for the spouse in the host country, in the same organization or elsewhere, arranging for work permit or looking for educational opportunities (Punnett, 1997, Harvey, 1998).

Awareness by the company of the special issues faced by families is a crucial element in adjustment and its support (Haslberger and Brewster, 2008). In case of dual career couples, where both partners are working, spouse's reluctance to give up their own career is a growing reason for rejecting foreign assignments as well as costly premature return (Punnett, 1997, Harvey, 1998). The compensation package must be decided based on the factors like: salary, reintegration guarantee, location bonus, schooling for accompanying children, support for the spouse, intercultural and language training, volume of home flights and housing. Doris Warneke and Martin Schneider (2011).

### **Career Enhancement**

Expatriate management includes practices like identifying the possible expatriates, selecting and training them, assessing their performance, and understanding the impact of the international experience on the careers of expatriates. Adler and Ghadar (1990). Expatriates report that they receive significant personal and self-development benefits from foreign assignments such as a broader, global perspective on the firm's operations and exposure to different cultures, career transitions and sense making (Ashford and Taylor, 1990). These types of development can have positive career and organizational implications (Webb, Wright, 1996).

The nature of role and responsibilities in foreign assignments also play an important role in adjustment by the expatriate (Bhanugopan and Fish, 2004). A successful expatriate experience is more likely to occur if multiple mentors in various locations are available as needed to offer information and career support to the expatriate (Crocitto, et al. 2005). The four strategic dimensions of adjustment in international assignments have been further analysed and the key variables determining these dimensions have been identified from past researches. Table 1 summarizes the four adjustment dimensions and their respective variables with the literature support.

**Table 1: Summary of Literature Support for Research Variables**

Strategic Dimension	Variable	Authors
Work Adjustment	Task Satisfaction <ul style="list-style-type: none"> <li>• Skill – Ability set</li> <li>• Role clarity</li> </ul>	Palthe, 2001; Breiden, et al, 2005
	Emotional Satisfaction <ul style="list-style-type: none"> <li>• Reinforcers</li> <li>• Needs</li> </ul>	Breiden, Mohr and Mirza, 2005
	Mentoring	Cohen, 2010
	Cross cultural training	Jan, 2006
Family Adjustment	Cross cultural training to family	Adler, 1991
	Family needs <ul style="list-style-type: none"> <li>• Education / Employment to spouse and children</li> </ul>	Punnett, 1997, Harvey, 1998; Haslberger and Brewster, 2008; Doris Warneke and Martin Schneider (2011)
General Adjustment	Social Support System	Caligiuri et al., 1998; Tornikoski, 2011
	Health, housing related issues	Black and Gregersen, 1991
Career Enhancement	Impact of expatriation on career	Adler and Ghadar (1990); Ashford and Taylor, 1990; Webb, Wright, 1996
	Role at overseas location and its impact	Bhanugopan and Fish, 2004

### Case Study Firms

Three global companies representing petroleum, hardware and software sectors were selected for the empirical inputs. These companies were selected using convenient sampling to save time and cost of data collection. The logic for taking diverse sectors was, to assess whether sectors have any influence on company practices of people management.

*Case 1:* This is a global group of energy and petrochemical companies, with the parent company incorporated in England and Wales. The headquarters of this 100 year old global oil and gas company is in The Hague, the Netherlands. It has operations in more than 90 countries with a strong force of 93000 employees. The company explores for and extracts crude oil and natural gas, refines, supplies, trades and ships crude worldwide, manufactures and markets a range of products, and produces petrochemicals for industrial customers and manages delivery of major projects and drives the research and innovation to create technology solutions. The company is the largest and most diversified international investor in India's energy sector among all global integrated oil companies. It is the only global major to have a fuel retail license in India.

*Case 2:* This leading Indian firm, with headquarter in Bangalore has been in business for more than 30 years. Its offerings span business and technology consulting, application services, systems integration, product engineering, custom software development, maintenance, re-engineering, independent testing and validation services, IT infrastructure services and business process outsourcing. It presently has 64 offices and 65 development centers in US, India, China, Australia, Japan, Middle East, UK, Germany, France, Switzerland, Netherlands, Poland, Canada and many other countries. The respondent has an experience of thirteen years and has handled operations in USA and UK. The company pioneered the Global Delivery Model (GDM), which is based on the principle of taking work to the location where the best talent is available, where it makes the best economic sense, with the least amount of acceptable risk. The company and its subsidiaries have 141,822 employees as on September 30, 2011.

*Case 3:* This century old global technology and innovation company is headquartered in Armonk, New York. It has its operations in more than 170 countries. The company manufactures and sells computer hardware and software, offers infrastructure, hosting and consulting services in areas ranging from mainframe computers to nanotechnology. Its solutions and services span all major industries including financial services, healthcare, government, automotive, telecommunications and education, among others. It started its operations in India since 1992 and has a presence in over 200 cities and towns across the country - either directly or through its strong business partner network.

### Analysis and Discussion

The findings of the interviews from senior executives of the three case companies have been analyzed on basis of their views on the role of their parent organization on the strategic dimensions of expatriate adjustment and related variables. The responses have been summarized in Table 2.

**Table 2: Role of Organization in expatriate adjustment**

Strategic Dimension	Variable	Case 1	Case 2	Case 3
Work Adjustment	Task Satisfaction Skill-Ability set Role clarity	<ul style="list-style-type: none"> <li>• Skill takes precedence over ability</li> <li>• In detailed one to one sessions.</li> </ul>	<ul style="list-style-type: none"> <li>• Mainly skill is considered</li> <li>• In brief one to one sessions.</li> </ul>	<ul style="list-style-type: none"> <li>• Both are important</li> <li>• In brief one to one sessions.</li> </ul>
	Emotional Satisfaction <ul style="list-style-type: none"> <li>• Reinforcers</li> <li>• Needs</li> </ul>	<ul style="list-style-type: none"> <li>• Same benefits to all the employees irrespective of location</li> <li>• No special consideration</li> </ul>	<ul style="list-style-type: none"> <li>• Same benefits to all the employees irrespective of location</li> <li>• No special consideration</li> </ul>	<ul style="list-style-type: none"> <li>• Same benefits to all the employees irrespective of location</li> <li>• No special consideration</li> </ul>
	Leadership <ul style="list-style-type: none"> <li>• Communication</li> <li>• Mentoring</li> </ul>	<ul style="list-style-type: none"> <li>• Formal - Daily</li> <li>• Informal - Weekly</li> <li>• 'Buddy' at host location to help in understanding local culture, customs, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Formal - one to one (Daily), Team meeting (weekly)</li> <li>• Informal - need based</li> <li>• Supervisor makes training plan for the expatriate and provides mentoring. 'Buddy' at host location'.</li> </ul>	<ul style="list-style-type: none"> <li>• Formal: Daily</li> <li>• Informal - occasionally</li> <li>• Supervisor mentors on technical and management issues. 'Buddy' at host location.</li> </ul>
	Cross cultural training (CCT)	CCT available on website. Language training is given if required	CCT sessions on a regular basis.	<ul style="list-style-type: none"> <li>• Pre-departure - in culture, customs, language.</li> <li>• Post-arrival - about the country, workplace.</li> </ul>
Family Adjustment	Cross cultural training to family	Important but not given	Important but not given	Important but not given
	Education / Employment to spouse and children	Financial assistance, aid in job search, new skills, to spouse. Assistance and help for kids' education.	If spouse in the same company, preference for same location postings. Otherwise no help. No help in education.	If spouse in the same company, preference for same location postings. Otherwise no help. No help in education.
General Adjustment	Social Support System	Membership of local clubs	No	No

	Health, housing related issues	Fully paid accommodation. Insurance cover and discretionary expenses	Lease or arranges for accommodation. Medical Insurance and Financial aid in case of emergency	Lease or arranges for accommodation Medical Insurance and Financial aid in case of emergency
Career Enhancement	Impact of expatriation on career	No credit to expatriation. Important in exposure and visibility.	No credit to expatriation. Grows in terms of new skills, client-interaction, etc.	No credit to expatriation. Grows as he learns new skills, client-interaction, etc.
	Role at overseas location and its impact	Role at host location can differ from home location. Impact on career - case based.	It can differ from home. Can be positive or Negative. Impacts appraisal.	No, mostly it does not differ. No impact.

Besides seeking views on the role of the organization, respondents’ views were also sought on relative importance of the variables of the dimensions of adjustment. In order to minimize the divergence in views, Delphi method of opinion collection was used. Two rounds of opinion collection were undertaken and the final responses are shown in the Table 3.

**Table 3: Ranking of Variables for Expatriate Adjustment**

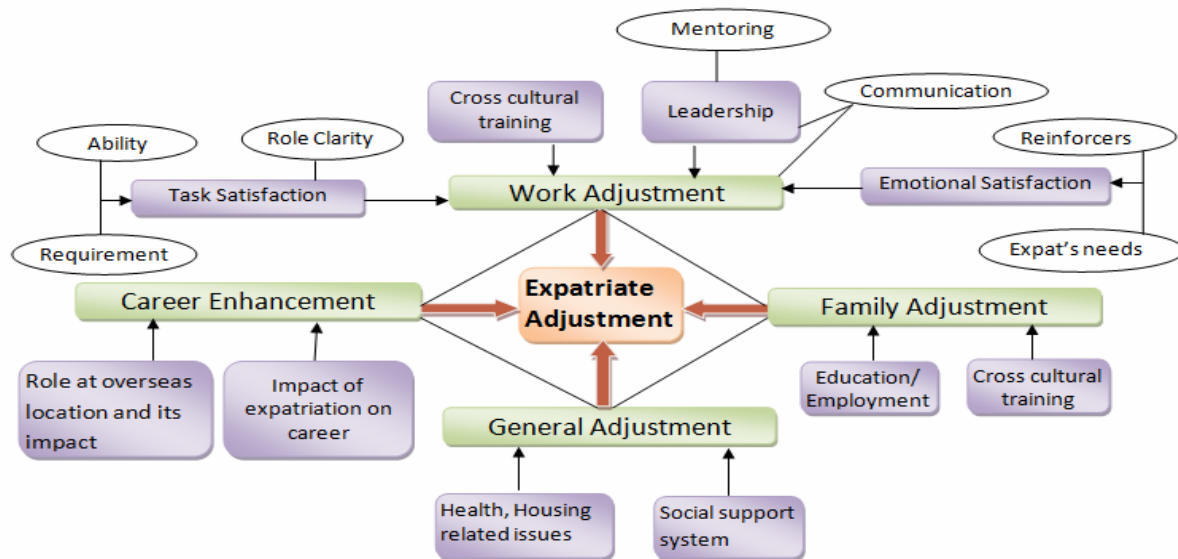
Rank	Variables
1	Task Satisfaction
2	Emotional Satisfaction
3	Family Needs
4	Impact of expatriation on career growth
5	Role at overseas location
6	Leadership
7	Health and Housing
8	Training to expatriate, family and supervisors
9	Social support

Looking at Table 2, the responses do not show any major shift from each other on most of the variables their responses regarding the role of parent organization is almost same, except for a few variables such as social support and support to family. But a look at Table 3 shows interesting findings. Besides task and emotional satisfaction other variables of work adjustment take a back seat from the perspective of the expatriate; while family adjustment gets the third rank followed by career growth. Communication and Mentoring also found important by the expatriates. General adjustment variable dimension gets a back seat and surprisingly training also finds a low ranking. The researchers tried to understand the reason and it was extrapolated that most of the respondents had been to English speaking countries, hence training was found less important.

### The Conceptual Model

Finally a research model has been drawn to show the impact of the parent organization on expatriate adjustment. The model shows the interrelationship between the four strategic dimensions and variables impacting expatriate adjustment, where organizational intervention is significant. It can serve as a guide to effective expatriate adjustment.

The model portrays the key organizational factors which significantly influence the adjustment of the expatriate at foreign location. It depicts four levels of variables with expatriate adjustment in the centre surrounded by the four dimensions and their variables and sub variables.



**Figure 1:** Model for Expatriate Adjustment and Organizational Support

Expatriate Adjustment depends upon the four strategic dimensions of Work Adjustment, Career Development, Family Adjustment and General Adjustment. These dimensions represent the four core areas which can be influenced by the parent organization of the expatriate. These dimensions are found to be interrelated and form an orbit of adjustment.

The third level of the model shows the variables of the strategic dimensions, where the parent organization may play a critical role, viz. task satisfaction, emotional satisfaction, cross-cultural training, leadership, role at overseas location and its impact, impact of expatriation on career, education/employment, health, housing, cost of living and social support system.

And at the Fourth level, the model depicts the sub-variables, which further refine the area of research. Ability and Requirement are interlinked, as they have to be in synch in order to achieve Task satisfaction. Mentoring and communication are the sub-variables of Leadership. The model also shows a link between Communication and Work Adjustment in order to highlight the importance of communication between the parent organization and the expatriate in the adjustment of the expatriate in the work environment.

## Conclusions

To conclude, it can be said that expatriate adjustment can be understood under the framework of the four strategic dimensions and their determinants. The parent organization can intervene in a major way in effective adjustment of the expatriates by influencing all of some of the four dimensions. The findings of the interviews highlight that where the company is making efforts on the four strategic dimensions, employees' adjustment is faster and easier. Among the adjustment variables, interviewees clearly highlighted that the task and emotional satisfaction are most important followed by adjustment of the family. It is an important finding which often companies tend to ignore while sending their people on international assignments. The model is generic in nature and not specific to any particular industry, which is evidenced by the variety of companies selected for validating the model. At the end the authors are confident that these findings may be used by the organizations while designing the strategy for managing people in foreign locations.

## Limitations and Scope for further Research

The authors are conscious that convenience sampling has its own limitations. Besides the sample size of three case studies may not be representative of the respective sectors. The model is conceptual and has to be tested with data drawn from larger sample size. However the same also provides an avenue for further research in the area and leaves scope for further refinement and validation of the model with larger number of case studies. The model can also be tested by using survey method of opinion collection.

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