A Critical Review of Expatriate Adjustment Literature:
Implications for Theory and Measurement

Oleh:
TAYAPHON RODSAI

Master of Management in University Catholic Parahyangan

Abstrak

Kata kunci: Expatriate Adjustment, International Assignment, Expatriation

A. Introduction
In globalization era, establishing overseas subsidiaries of multinational corporations (MNCs) is one way to create a presence and sustain a competitive advantage in global arena (Moran, Palmer, & Borstorff, 2007). When a firm begins to internationalize, it faces issues concerning the use of expatriate in its foreign operations (Kobrin & Stephen, 1988). Expatriate is defined that home country nationals who sent by the parent company to work temporarily in another country are called (Mcvoy & Buller, 2013). When the firm sent employees overseas, most of these expatriates initially do not know how to appropriately and effectively behave in the host culture (Black & Mendenhall, 1991). At the same time, they need to perform the same set of functions to manage their assignment. When expatriate cannot perform and adjust themselves well in different physical or cultural environments, it relates to their failure (Chansa-ngavej, Bunchapattanasakda, & Tiawijit, 2008) on international assignment. Expatriate’s failure can lead to high cost of multinational corporations. Failed assignments have been reported to cost organizations as much as $1 million for a
single expatriate (Shaffer & Harrison, 1998). The cost is two to three times that of nationals, on an average, (Black & Gregersen, 1999). For more than two decades, research has examined a variety of causes for performance problems, inadequate adjustment, and dissatisfactions that are associated with the international assignment. Much of the research has focused on expatriate adjustment (Hechanova, Beehr, & Christiansen, 2003). Therefore, the aim of this study is to review the four-decade expatriate adjustment literature that scholars had made and had not made it yet. The review identifies gaps and stimulates new research directions on expatriate adjustment. Also, it reviews the conceptualization and measurement of expatriate adjustment. Finally, the knowledge of expatriate adjustment is considered to discuss implications for future research.

B. Timeline of expatriate adjustment studies

The research in expatriate adjustment studies has been developed highly in the past three decades. This was developed from its research roots in the foreign-student adjustment literature going back over 50 years (Hippler, Caligiuri, & Johnson, 2014). The study of human behavior in cross-cultural interactions had existed for some time, but this research was largely limited to the study of visiting students in the United States, for example, Smith’s study in 1956 (Thomas & Lazarova, 2006). Explicit in the research on expatriation during the 1970s and early 1980s that adjustment was crucial to effectiveness on overseas assignments and that selection and training programs should be designed to facilitate adjustment (Thomas & Lazarova, 2006) due to firms tended to select expatriates based on technical skills, their existing performance than depended on their ability to adjust. From the early 1980s, many scholars established a foundation for the field of expatriate adjustment that exists today. Following earlier influential contributions by Church (1982) and Torbiörn (1982), and Black and his colleagues (Black J. S., 1988; Black & Stephen, 1989; Black, Mendenhall, & Oddou, 1991), The explosion of research on the topic that occurred from the late 1980s to the 1990s and to some extent continues today. The reason was the high
cost of expatriate failure, with expatriate failure defined as the premature return from the assignment because of the failure of the expatriate (or spouse) to adjust. For instance, Tung (1981; 1982) identified the inability of expatriates and their spouses to adjust to a different physical and cultural environment as the most prominent reasons for expatriate failure, interest in expatriate adjustment among management scholars has grown exponentially.

The growth of this field has been outstandingly led by Black and his colleagues (Hippler T., Caligiuri, Johnson, & Baytalskaya, 2014). Using the Social Sciences Citation Index, Dabic et al., (2015) displayed that Black is number one in the frequency of authors’ citations (796 citations, 14.5% of total citation) due to their model. Bhaskar-Shrinivas et al. (2005) found 51 studies that were partly based on the Black et al model and 15 that were not. The adjustment model proposed by Black, Mendenhall, and Oddou (1991) is the most influential and it can be considered a context-specific reflection of the stressor-stress-strain sequence (Bhaskar-Shrinivas, Harrison, Shaffer, & Luke, 2005). Black, Mendenhall, and Oddou (1991) model provides an overall abstraction of concepts which determine an expatriate adjustment in host countries (Poonpol, 2010). They proposed the model of expatriate adjustment separating into anticipatory adjustment and in-country adjustment that has five main variables (individual, job, non-work, organization culture, and organization socialization).

Bhaskar-Shrinivas et al. (2005) argued two contributions of this model. One contribution is its multifaceted conceptualization of adjustment. Black and Stephens (1989) proposed that conceptualizations of adjustment. Adjustment is defined as the degree of comfort or absence of stress associated with being an expatriate. It comprises three main dimensions: general or cultural, interaction and work. General adjustment refers to the degree of comfort associated with various nonwork factors such as general living conditions, local food, transportation, entertainment, facilities, and health care services in the host country; hereafter we use the term “cultural”. Interaction adjustment refers to the degree of comfort associated with interacting with host country nationals both inside and outside of work. Work adjustment refers to the degree of comfort associated with the
assignment job or tasks. Those definitions have been clearly “operationalized” by Black and Stephens (1989) and consistently validated (Shaffer, Harrison, & Gilley, 1999). Another contribution is its consideration of a wide scope of both anticipatory (pre-assignment) and in-country inputs to adjustment. The fit of their propositions to the growing body of empirical studies has yet to be comprehensively tested. Therefore, researchers have examined the model and found what facilitates or hinders expatriates’ adjustment on international assignment. As cross-cultural adjustment is multifaceted, it follows logically that the various antecedents to adjustment may have different degrees of impact on each facet of adjustment (Palthe, 2004). For instance, specific job-related variables such as role clarity is expected that it will be associated with work adjustment and not general adjustment. Similarly, specific non-work variables such as family adjustment and cultural similarity are expected to be related to general adjustment and not work adjustment because general adjustment involves adjusting to overall living conditions in the host country (outside of work) while work adjustment involves expatriates adjusting to their new role in the host company (at work) (Palthe, 2004).

For two decades, researchers have examined and followed the Black, Mendenhall and Oddou’s (1991) comprehensive model of international adjustment (Hippler T., Caligiuri, Johnson, & Baytalskaya, 2014). The focus on a single conceptualization and operationalization of expatriate adjustment was instrumental in generating enough empirical studies to permit two comprehensive meta-analyses by Bhaskar-Shrinivas, Shaffer and Luke (2005) and Hechanova, Beehr and Christiansen (2003) and thus to some degree consolidate the field (Hippler T., Caligiuri, Johnson, & Baytalskaya, 2014). These comprehensive meta-analytical review articles are evidence of integrating the results of up to 66 investigations into antecedent-effect relationships. Hechanova et al.’s (2003) study categorized antecedent variables into four types (individual, work related, environmental, and family related), while Bhaskar-Shrinivas et al. (2005) study categorized them into five (anticipatory, individual, job, organization, and non-work). Takeuchi (2010) summarized the two meta-analytic study. Due to a larger
number of studies, he categorized set of antecedents by following Bhaskar-Shrinivas et al. (2005) meta-analytic study and added some variables of Hechanova et al. (2003). Anticipatory variables are the first set of predictor. It is referred to pre-departure expatriate expectations and preparations for an upcoming assignment. It includes an expatriate’s language ability and previous overseas assignments. Language ability was significantly and positively related to interaction but not to general or work adjustment. Previous overseas experience was positively and significantly related to both work and interaction but not to general adjustment. Second, individual factors are personal requirements for effectiveness in an overseas environment. It comprises self-efficacy, relational skills, and educational level. Self-efficacy was positively related to both work and interaction adjustments. Relational skills were positively related to all three facets of adjustment. Education level to be positively related to general and work adjustment but negatively related to interaction adjustments (Hechanova, Beehr, & Christiansen, 2003). Third, job variables are features of the work environment over which an expatriate has little or no control. Job variables comprise role clarity (exact understanding of position requirements), role discretion (decision making autonomy), role novelty (differences between host and native country work roles), and role conflict (incompatible cues regarding job expectations). Role clarity and role discretion were found to be positively related to all three facets of adjustment. Role conflict was negatively related to work and interaction but not to general adjustment. Job level to be negatively related to general and work adjustment but positively related to interaction adjustment; organizational tenure was positively related to work and interaction but not to general adjustment; months on assignment and outcome expectancy were positively related to all three facets of adjustment; and cross-cultural training was negatively related to all three facets of adjustment (Hechanova, Beehr, & Christiansen, 2003). Forth, organizational variables are features of the overseas or parent firm’s culture (Guzzo, Noonan, & Elron, 1994). It comprises social support from coworkers and logistical support from the parent company. Coworker support was positively related to all three facets of adjustment while logistical support was
positively related to general and interaction but not to work adjustment. Finally, non-work variables are stressors pertaining to aspects of the foreign environment other than one’s job, such as culture novelty and family/spouse adjustment. Culture novelty was negatively related to all three facets of adjustment, while spouse adjustment was positively related to all three facets of adjustment.

Besides antecedents of expatriate adjustment, researchers have focused on adjustment consequences. More a decade, there was little research that actually measured and tested the relationship between adjustment and these outcomes among expatriates (Naumann, 1993). The meta-analysis of Bhaskar-Shrinivas et al. (2005) identified less than a dozen studies that had included consequences of adjustment (Takeuchi R., 2010). This lack of attention on the consequences of expatriate adjustment may be in part due to the difficulty of obtaining additional rating sources who can evaluate expatriate outcomes because access to an expatriate sample is already considered to be very difficult (Harrison, Shaffer, & Bhaskar-Shrinivas, 2004). However, some researchers have an attempt to study about the consequences. Consequences that have been investigated include job satisfaction (Hechanova, Beehr, & Christiansen, 2003; Bhaskar-Shrinivas, Harrison, Shaffer, & Luke, 2005), organizational commitment (Hechanova, Beehr, & Christiansen, 2003; Kraimer & Wayne, 2004), early return intentions/withdrawal cognitions (Takeuchi, Yun, & Russell, 2002; Hechanova, Beehr, & Christiansen, 2003), and performance (Hechanova, Beehr, & Christiansen, 2003; Kraimer & Wayne, 2004; Bhaskar-Shrinivas, Harrison, Shaffer, & Luke, 2005).

More than four decades, the existence of several theoretical (Church, 1982; Black, Mendenhall, & Oddou, 1991) and empirical (Hechanova, Beehr, & Christiansen, 2003; Bhaskar-Shrinivas, Harrison, Shaffer, & Luke, 2005) reviews of expatriate cross-cultural adjustment but it has been criticized for drawing on too narrow a theoretical base (Hippler T., Caligiuri, Johnson, & Baytalskaya, 2014) due to the research on expatriate adjustment generally focused on those three specific facets (Hechanova, Beehr, & Christiansen, 2003), examining model suggested by Black et al. (1991), and searching for factors that influence cross-
cultural adjustment (Mendenhall & Oddou, 1985). Takeuchi (2010) pointed out that a sufficiently large number of empirical studies from Black et al.’s (1991) model may unintentionally have restricted the focus of subsequent studies to (a) looking more exclusively at expatriate employees themselves and variables associated with them; (b) treating adjustment as an end to itself, not as a means to an end; (c) examining only those variables included in the model; and (d) investigating simple, direct, or linear relationships among antecedents and adjustment. For example, while there are certainly a few studies that have examined the consequences of adjustment, the majority of them only consider expatriates’ own outcomes. It also made research on cross-cultural adjustment has been geared more forward a somewhat haphazard search for factors that influence cross-cultural adjustment, rather than toward theoretically explaining the adjustment process and why certain factors would be expected to influence adjustment (Mendenhall & Oddou, 1985).

To raise expatriate adjustment research, the researchers proposed their assumptions that derived from what have been neglected and what have not been studied in the previous research. Takeuchi (2010) pointed about the previous research. The first point, it has been predominantly “expatriate-centric” and has neglected other “stakeholders” who can affect and be affected by expatriates. A stakeholder refers to “any group or individual who can affect or is affected by the achievement of the firm’s objectives” (Freeman, 1984, p. 25). He proposed three key stakeholders: family, host country national, and parent organization. The second point, much of the research has adopted the stress perspective of employee adjustment (Kraimer & Wayne, 2004) because it is especially relevant to expatriate assignments due to the uncertainty involved in living and working in a foreign country (Black, Mendenhall, & Oddou, 1991). He introduced social exchange and strategic human resource management perspectives as theoretical perspectives or reintroduced work-family conflict perspective as a theoretical perspective of expatriate adjustment to moving the field forward and develop a set of research ideas to illustrate potential future research directions. The last point, previous variables examined in this field relate to each other in a direct or linear manner
(Bhaskar-Shrinivas, Harrison, Shaffer, & Luke, 2005). He expanded view of the multiple stakeholder view of expatriate adjustment with selecting variables for each stakeholder based on the theoretical perspectives used in his review and created an integrative, interactionist framework of multiple stakeholder view of expatriate to highlight some of each of the stakeholder’s potential antecedents that are likely to influence expatriate adjustment (and outcomes associated with them) as well as some of the consequences for the each stakeholder (Takeuchi, 2010). In addition, he adopts specifically a person-situation interaction perspective as an overarching theoretical perspective here and argued that focusing attention on the interface between stakeholders and expatriates provides opportunities for new research on expatriate adjustment. Despite it has a long tradition in the management field, it is surprising that there is a lack of theoretical and empirical attention in the existing expatriate studies that adopt this perspective (Takeuchi, 2010).

Besides Takeuchi (2010)’s assumption, other researchers have been aware of the critical issues and have tried to extend the knowledge of this field. For instance, Bhatti, Battour, and Ismail (2013) have tried to extend the body of expatriate adjustment’s knowledge and practice by examining the role of expatriate adjustment (work, general and interaction) as a mediator between individual (previous international experience, self-efficacy, social network and cultural sensitivity) and organizational factor (direct and indirect support) and job performance. Peltokorpi (2008) examined type of expatriate (organizational or self-initiated expatriates) as a one of determinants of expatriate cross-cultural adjustment related to non-work (interaction and general living adjustment) and work (work adjustment and job satisfaction) aspects in Japan. However, their studies have still been related and used Black et al.’s model as main conceptualization and operationalization (14 item measure) of expatriate adjustment.

Additionally, many researchers pointed out the methodological issues of expatriate adjustment. For instance, Thomas and Lazarova (2006) pointed out an issues of expatriate adjustment’s instrumentation, such as the 14 item measure by
Black and Stephens (1989) for a developmental history that it does not satisfy any of the criteria commonly associated with scale development. Mendenhall, Kühlmann, Stahl and Osland (2002) identified several persistent inconsistencies or ‘paradoxes’ in their cumulative evidence, including inconclusive evidence about the effect of culture novelty/culture distance, pre-departure training and previous international experience on expatriate adjustment (Hippler T., Caligiuri, Johnson, & Baytalskaya, 2014). Hippler, Caligiuri and Johnson (2014) suggested three methodological concerns that they believe it may contribute to present these inconsistencies: (1) a need to operationalize expatriate adjustment less ambiguously, (2) a need to identify the constituting elements of the person–environment (P–E) relationship that must underlie the construct of adjustment and (3) a need to question the implicit assumption that all expatriates perceive all environmental aspects to be of equal importance. This study will review the methodological issues and researchers’ attempt to advance this field further in the conceptualization and operationalization of adjustment in next part.

C. The conceptualization and operationalization of adjustment

The conceptualization of adjustment

Past researchers have different views about adjustment. Early, Oberg (1960) conceptualized definitions of adjustment in terms of overcoming culture shock. Campbell (1981) defined adjustment in terms of subjective well-being. Following by Church (1982), adjustment was defined as ‘a normal process of adaptation to cultural stress involving such symptoms as anxiety, helplessness, irritability, and longing for more predictable and gratifying environment’. Then, Black and Gregersen (1991: 498) defined adjustment as the degree of perceived psychological comfort with various aspects of a new setting’ and thus expatriates’ subjective well-being in three environmental domains, work, general, and interaction, (Hippler, Caligiuri, & Johnson, 2014). This conceptualization implied in the work (Thomas & Lazarova, 2006). A parallel concept of Black and colleagues is a separate adjustment model developed in the broader intercultural relations literature by Ward and associates (Hippler, Caligiuri, & Johnson, 2014).
Ward and associates distinguish between psychological and sociocultural adjustment, the former covering the aspect of subjective well-being, and the latter behavioral competence (Ward, 1996). Compared with the Black and Stephens’ (1989) measure, it is less specific to the business context, which might explain why it has enjoyed little attention in the expatriate management literature (Hippler T., Caligiuri, Johnson, & Baytalskaya, 2014). Black, Mendenhall, and Oddou (1991) model is (1) “the most influential and often-cited theoretical treatment of expatriate experiences” (Bhaskar-Shrinivas, Harrison, Shaffer, & Luke, 2005, p. 257), and (2) used as the guiding framework in two published large-scale meta-analyses (Hechanova, Beehr, & Christiansen, 2003; Bhaskar-Shrinivas, Harrison, Shaffer, & Luke, 2005), thereby underlining its dominance in the business expatriate adjustment literature (Hippler, Caligiuri, & Johnson, 2014). Others have conceptualized adjustment as psychological well-being and sociocultural competence (Searle & Ward, 1990), or the ‘degree of fit between the expatriate manager and the environment, both work and sociocultural’ (Aycan, 1997), or general satisfaction with one’s life in the new environment (Hippler, 2000) (Bhaskar-Shrinivas, Harrison, Shaffer, & Luke, 2005). Furthermore, Selmer (1999) defined it in terms of socio-cultural characteristics in achieving effectiveness in an interpersonal exchange with host country nationals.

In addition, many authors have pointed to the fact that the expatriate adjustment literature fails to agree on what is meant by—and in some cases even fails to define—the term “adjustment” (Hippler, Caligiuri, & Johnson, 2014). No emergence of conceptual or operational consensus become apparent when Ones and Viswesvaran (1997) ask whether adjustment is a component or a determinant of job performance. Without a clear understanding of what is meant by “adjustment,” this question cannot be answered (Hippler, Caligiuri, & Johnson, 2014). It leads the possibility of a conceptual overlap between adjustment and at least some aspects of performance (Thomas & Lazarova, 2006). Thomas and Lazarova (2006) mentioned about complicating matters of using adjustment, adaptation and acculturation synonymously or not defining adjustment explicitly or operationalizing it through different constructs such as effective performance,
satisfaction, degree of social interaction with host nationals, positive attitudes towards the host country, personal of professional growth, profile of mood states, mental health, absence of stress or premature return from assignment. However, the most currently dominant paradigm conceived of adjustment is Black’s definition, which explains that adjustment can be categorized as work, general, and interaction adjustment (Hippler T., Caligiuri, Johnson, & Baytalskaya, 2014).

**Dimensionality and operationalization of adjustment**

Much of recent research have been conceptualized adjustment as a multidimension while some authors adopt a single dimensional approach. The most often cited facet model of adjustment is the three-facet representation of adjustment first suggested by Black (1988). This model is comprised of adjustment to work, adjustment to interacting with host nationals, and adjustment to the general non-work environment. The three-facet solution was repeatedly confirmed by running a factor analysis using the items suggested by Black and Stephens (1989) as input (Hippler T., Caligiuri, Johnson, & Baytalskaya, 2014). It made Black and Stephens’s (1989) 14-item measure become the most often used measure for expatriate adjustment (Hippler, Caligiuri, & Johnson, 2014). Therefore, in this review, Black (1988)’s three facets, and Black and Stephens (1989) 14-item measure are mainly reviewed as being the most used measure and others is mentioned as additional information for the interested researchers.

Black (1988) was the first to suggest that adjustment is a multifaceted construct. There are three separate facets: general adjustment, interaction adjustment and work adjustment of the expatriate’s environment. Those tripartite definitions have been clearly “operationalized” by Black and Stephens (1989). Black and Stephens (1989) proposed 14 item to measure the three facets. General adjustment comprises of 7 items: general living, transportation, food, shopping, weather, entertainment, and interacting with local in general. Work adjustment comprises of 3 items: job responsibility, interacting with co-workers, and interacting with co-workers. Interaction adjustment comprises of 4 items: working
with local outside, interacting with local in general, interacting with co-workers, and interacting with subsidiaries. It was observed that 3 items (interacting with local in general, interacting with co-workers, and interacting with subsidiaries) in interaction adjustment are same with items in general and work adjustment. Therefore, in fact, it has merely 11 items as constructs to operationalize three facets of Black (1988). Each of the 11 items begins with “how adjusted are you to . . .” followed by three separate facets of the expatriate’s environment, such as how adjusted are you to interacting with co-workers.

Some early studies explicitly tested the dimensionality of this construct (for example, Parker & Inkson, 1993) but more recent expatriate research simply accepts the model as axiomatic (Thomas & Lazarova, 2006). Thus, it has accumulated sizeable evidence for significant relationships between adjustment facets and specific antecedents and outcomes for more than three decades. However, some research pointed out that using the items introduced by Black and colleagues in a non-standardized manner (see Hippler, Caligiuri, & Johnson, 2014). The original scale has seven points but the following researchers have used the scale differently, such as five-point, six-point, nine-point, and ten-point scales (Hippler, Caligiuri, & Johnson, 2014). Also, the response options vary widely (Hippler, Caligiuri, & Johnson, 2014). For the unadjusted end of the scale, the following response options have been used: “not adjusted at all”, “very unadjusted”, “totally unsettled”, “poor”, “extremely unadjusted”, “not at all”, or “adjusted to a very small extent”. Only a few authors present verbatim sample items. Hippler, Caligiuri, & Johnson (2014) accumulated those researchers: Cole and McNulty (2011, 151) (“Please indicate how adjusted you are to . . .”), Florkowski and Fogel (1999, 802) (“Overall, how adjusted are you to . . .”), Takeuchi, Lepak, Marinova, and Yun (2007, 935) (“Please rate your own degree of adjustment to . . .”), and Selmer (2004, 807) (“Please indicate the degree to which you are adjusted or not adjusted to . . .”). The degree to which this variability in operationalization and instrumentation poses a threat to the generation of cumulative knowledge is another question our field needs to address (Hippler, Caligiuri, & Johnson, 2014).
Even though Black and Stephens’s (1989) 14-item measure is the most often used measure for expatriate adjustment, it has some severe conceptual and measurement limitations of this construction from some researchers. For instance, Hippler, Caligiuri, & Johnson (2014) pointed out about asking the question “how adjusted are you to . . .” effectively amounts to operationalizing “adjustment” as “adjustment.” In the current operationalization, they mentioned that items do not have consistent explicit meanings. Their example for clearly understanding (see Hippler, Caligiuri, & Johnson (2014) is the question “how adjusted are you to interacting with host nationals on a day-to-day basis” (see Black and Stephens 1989). This question could be interpreted possibly into the various question. For instance, “how adjusted are you to interacting with host nationals on a day-to-day basis” could be read as: (1) how satisfied are you with the interaction with host nationals; (2) how accepted do you feel in the interaction with . . . ; (3) how comfortable do you feel in the interaction with . . . ; (4) how effective are you in the interaction with . . . ; (5) to what extent do you interact with . . . ? (Hippler, Caligiuri, & Johnson, 2014). In fact, they cannot be deemed equivalents of each other. And, if there is no equivalence of meaning, responses cannot be meaningfully aggregated (Hippler, Caligiuri, & Johnson, 2014). Moreover, Thomas and Lazarova (2006) argued that the original work by Black and colleagues yields little in the way of theoretical clarity on construct definition and operationalization. Black (1988) points out that there exists ‘some theoretical and empirical support for the inclusion of adjustment to outside work factors as another facet of adjustment’ (Thomas & Lazarova, 2006) in the literature on work adjustment in domestic transfers. It seems to have at least two facets of adjustment: work adjustment and general adjustment’ (Black J. S., 1988, p. 279). Whereas, in the same article, he goes on to say ‘It seems, expatriate managers adjust to 1) work roles; 2) interacting with host country nationals [. . .], and 3) the general culture and everyday life (Thomas & Lazarova, 2006). Even though Black’s (1988) scale has several conceptual and measurement limitations, the conceptualization and related measurement become ubiquitous in further work on adjustment (Thomas & Lazarova, 2006). It has started as being a set of logical and intuitive, but
ultimately data-driven, propositions that lack theoretical (and even empirical) substantiation (Thomas & Lazarova, 2006), but eventually it has been established the standard for several decades.

Another conceptualization of adjustment used extensively in cross-cultural adjustment research, but less popular among expatriate researchers, is presented by Searle and Ward (1990) (Thomas & Lazarova, 2006). Searle and Ward (1990) suggested the need to distinguish between two related but distinct facets of adjustment: psychological and socio-cultural. Psychological adjustment can be best understood in terms of a stress and coping framework, and socio-cultural adjustment—within a social skills and culture learning paradigm (Thomas & Lazarova, 2006). Its definitions were mentioned in above in this review. They measure psychological adjustment with an established depression inventory, which is not entirely consistent with other measures that have been used to capture psychological adjustment. Sociocultural adjustment was measured by items asking respondents to report the level of difficulty they experienced in various areas such as making friends, making themselves understood, or understanding local humor. Comparing with Black and her colleagues, Ward and associates provide a more solid theoretical basis of their conceptualization of adjustment than Black and her colleagues. But, they do not propose a comprehensive model of adjustment, and their early investigations of the antecedents of the two facets are, to some extent, piecemeal and empirically driven (Thomas & Lazarova, 2006). Thomas and Lazarova (2006) mentioned that these scale is complicated because the scale is often modified according to the sample.

Recently, Hippler, Caligiuri, & Johnson (2014) investigated the dimensionality of a new theoretically based measure of expatriate adjustment using a sample of 825 expatriates drawn from a broad range of home and host countries. They expected that this new approach would help to assess expatriate adjustment among international assignees on behalf of a key predictor of assignment outcomes. They have organized the adjustment conceptualizations, identified in the international relocation adjustment literature according to the
three dimensions of subjective well-being, social functioning, and health (Hippler, Caligiuri, & Johnson, 2014). Their study also presented supporting validity evidence for the new scale from a sample of 209 expatriates. This study validating a new measure of expatriate adjustment has a number of strengths. The 35 items comprising the new scale were sampled from the full content domain. The items were taken from an empirically grounded item pool that had resulted from a large-scale qualitative research effort. They proposed expatriate adjustment scale that considers the differing saliency of various facets of the environment for expatriates by including an assessment of the importance of each facet. It also is shown to relate to assignment performance, assignment development and general satisfaction. Compared with past measures, they mentioned this measure is based on (1) the full content domain of expatriate adjustment facets and (2) the theoretical underpinnings of adjustment, including the link between the environment in the person–environment fit relationship and the role of the person in this individually based state (i.e. not all facets of expatriate adjustment are of equal importance for all individuals).

In summary, each of the conceptualizations and measures of adjustment have specific strengths, those offers are valuable insights for adjusting a new setting, but it needs to be developed and investigated to address important shortcomings.

D. Reflections and observations

After reviewing four-decade the expatriate adjustment literatures, and its conceptualizations and measure, below is some of these conceptual and methodological issues of expatriate adjustment that are rarely studied and need to broaden understanding further.

1. Adjustment process

Researchers on expatriate adjustment have focused on search for factors that influence expatriate adjustment and, some of them, started to focus on its outcomes, rather than toward theoretically explaining the adjustment process and why certain factors would be expected to influence adjustment (Mendenhall &
Oddou, 1985). It leads mechanisms, strategies and time required to achieve adjustment remain under-researched. However, several frameworks for exploring the process of adjustment, such as social learning principles and operant conditioning (Church, 1982), role transitions and socialization theory (Black & Gregersen, 1991), appraisal of acculturation experiences and coping (Aycan, 1997a) have been suggested (Thomas & Lazarova, 2006). Thus, process of adjustment could be the one of interesting studies of adjustment field for the further researchers.

2. Expatriate-centric

The vast studies on expatriate adjustment literature has been predominantly “expatriate-centric” and has neglected other “stakeholders” who can affect and be affected by expatriates, such as expatriate’s family, host country national, parent organization (Takeuchi R., 2010). Therefore, it’s worth to broaden understanding about the stakeholders who can affect or is affected by expatriate.

3. Antecedents and outcome of expatriate adjustment

For more than two decades, researchers have searched the antecedents and outcomes of expatriate adjustment by followed the Black, Mendenhall and Oddou’s (1991) comprehensive model. Eventually, it has two comprehensive meta-analyses by Bhaskar-Shrinivas, Shaffer and Luke (2005) and Hechanova, Beehr and Christiansen (2003) that accumulate the studies of the antecedents and outcomes of expatriate adjustment. The antecedents searched and examined are “expatriate-centric” factors. Thus, future research should be searched and examined the antecedents that related with other stakeholders who influence and be influenced by expatriate (see Takeuchi, 2010).

Bhaskar-Shrinivas et al. (2005) identified less than a dozen studies that had included consequences of adjustment (Takeuchi R., 2010). In the two comprehensive meta-analyses, the outcomes from previous studies have been accumulated and outcomes that never addressed in Black and colleagues (1991) model have been also proposed, such as job satisfaction, withdrawal cognitions,
and performance. To extend the theory, it is worth to search additional outcomes and examine it further.

4. Conceptualization of expatriate adjustment

Many researchers pointed out the fact that the expatriate adjustment literature fails to agree on what is meant by—and in some cases even fails to define—the term “adjustment” (Hippler, Caligiuri, & Johnson, 2014). Also, complicating matters of using adjustment, adaptation and acculturation synonymously. Even though, the most currently dominant paradigm conceived of adjustment is Black’s definition, which explains that adjustment can be categorized as work, general, and interaction adjustment (Hippler T., Caligiuri, Johnson, & Baytalskaya, 2014). Black’s three-dimensional conceptualization and operationalization of expatriate adjustment have been criticized that it has an overlap of classification systems (Brewster, 1993). Therefore, further researchers should emphasize on the conceptualization of expatriate adjustment.

5. Operationalization of expatriate adjustment

After reviewing of operationalization of expatriate adjustment (Black and Stephens, 1989; Searle and Ward, 1990; Hippler, Caligiuri, & Johnson, 2014), those measures have own specific strengths but it needs to be developed and investigated validity and reliability to reduce its error.

6. Self-assessment

Many studies of expatriates have relied on self-assessment of adjustment while in rare cases that other stakeholders, such as expatriate’s supervisors, subordinates, assess expatriates’ adjustment. Besides adjustment, outcomes and antecedents of adjustment also have been assessed by expatriates. For instance, the studies of expatriates used performance as an outcome have relied on self-reports than supervisor ratings (for example, Caligiuri, 2000; Caligiuri & Tung, 1999; Clarke & Hammer, 1995; Stoner, Aram & Rubin, 1972) and in rare cases subordinate ratings (Shay & Baack, 2004)(Thomas & Lazarova, 2006). They might not report truly. As Nisbett and Wilson (1977:231) have cogently
demonstrated, ‘when people attempt to report on their cognitive processes . . . they do not do so with any true introspection. Instead, their reports are based on a priori, implicit causal theories, or judgments about the extent to which a particular stimulus is a plausible cause of a given response’ (Thomas & Lazarova, 2006).

The main objective of this critical review of the expatriate adjustment literature is to summarize the four decade studies to highlight current knowledge in this area that scholars had made and had not made it yet. Also, the conceptualization and measurement of expatriate adjustment were reviewed to increase understandings and shortcomings about expatriate adjustment’s existing concepts and measures. As a result, observations from existing research streams lead to enhance and broaden the area of this field.

Reference


