

CHAPTER 3 DIMENSIONS, DOMAINS, DYNAMICS - A 3-D MODEL OF ADJUSTMENT ¹

This chapter examines the central concept of adjustment. The review of related theories in Chapter 2 has shown that theorists have paid insufficient attention to the conceptualisation of adjustment. Only with a sufficiently detailed theoretical concept of adjustment can we develop a sound understanding of the factors influencing it and their exact effects. With such better understanding the planning for and the management of international assignments will improve. This chapter grounds our conceptualisation of adjustment in the P-E fit model introduced in the previous chapter and then introduces the notions of expatriate adjustment that form the core of this book: the dimensions of adjustment; the domains of adjustment; and the dynamics of adjustment. Each of these concepts will be explored in greater detail in the following chapters but here we present them together in a comprehensive model of expatriate adjustment.

Our model is more complete and therefore inevitably more complicated than others that have been used so far. Clearly, every theory has to balance comprehensiveness and parsimony.² But Whetten suggests that in the process of developing a theory while paying careful attention to the two “competing virtues” one “should err in favor of including too many factors [because] ... [i]t is generally easier to delete unnecessary or invalid elements than it is to justify additions.”³ Empirical research will show whether some of the combinations of internally- and externally-referenced cognitive, affective, and behavioural adjustment consistently produce no relevant results across domains and should, therefore, be ignored in the future. But until such results are available it is necessary to cover the whole territory at an equal level of detail. Karl Popper stated in his classic on

¹ Some sections of this and the next chapter are based on Haslberger, Brewster, & Hippler Arno Haslberger, Chris Brewster, and Thomas Hippler, "The Dimensions of Expatriate Adjustment," *Human Resource Management* 52, no. 3 (2013)..

² David A. Whetten, "What Constitutes a Theoretical Contribution?," *Academy of Management Review* 14, no. 4 (1989).

³ *Ibid.*, 490.

scientific discovery: “Theories are nets cast to catch what we call 'the world': to rationalize, to explain, and to master it. We endeavour to make the mesh ever finer and finer”,⁴ a statement cited regularly by theorists.⁵ The idea of cross-cultural adjustment offered here is one such attempt at creating a finer net to capture more information about which variables foster or hinder adjustment and how.

Adjustment as a person-environment (P-E) relationship

We ground expatriate adjustment in the P-E fit literature that maintains that individuals and their environments must meet each others' requirements for continued interaction.⁶ P-E fit theory has informed management research in the work sphere in areas such as person-vocation, person-job, person-organization, person-group and person-supervisor fit.⁷ Dawis and Lofquist's⁸ Theory of Work Adjustment (TWA) was described in Chapter 2. It was the basis for over 100 studies in management

⁴ Karl Popper, *The logic of scientific discovery*, Routledge Classics (London: Routledge, 2002). 37-8.

⁵ e.g. Robert Dubin, *Theory building* (New York: The Free Press, 1969); Badrinarayan Shankar Pawar, *Theory building for hypothesis specification in organizational studies* (Los Angeles: Sage, 2009); William B. Gudykunst, "An anxiety/uncertainty management (AUM) theory of effective communication: Making the mesh of the net finer," in *Theorizing about intercultural communication*, ed. William B. Gudykunst (Thousand Oaks: Sage, 2005).

⁶ René V. Dawis and Lloyd H. Lofquist, *A psychological theory of work adjustment: an individual-differences model and its applications* (Minneapolis, MN: University of Minnesota Press, 1984).

⁷ Amy L. Kristof-Brown, Ryan D. Zimmerman, and Erin C. Johnson, "Consequences of individuals' fit at work: a meta-analysis of person-job, person-organization, person-group, and person supervisor fit," *Personnel Psychology* 58, no. 2 (2005).

⁸ Dawis and Lofquist, *A psychological theory of work adjustment: an individual-differences model and its applications*.

in general⁹ and, to a lesser extent, of expatriate adjustment research.¹⁰ Various reviews of the related literature have found support for the TWA.¹¹ One reviewer concluded “that the P-E fit model provides a valid and useful way of thinking about the interaction between the individual and the environment”.¹²

⁹ Howard E. Tinsley, "Special issue on the Theory of Work Adjustment," *Journal of Vocational Behavior* 43, no. 1 (1993).

¹⁰ Jerry Newman, Bhal Bhatt, and Thomas Gutteridge, "Determinants of expatriate effectiveness: A theoretical and empirical vacuum," *Academy of Management Review* 3, no. 3 (1978); J. Stewart Black, Mark Mendenhall, and Gary Oddou, "Toward a comprehensive model of international adjustment: An integration of multiple theoretical perspectives," *Academy of Management Review* 16, no. 2 (1991); for example Jeffrey C. Ady, "Toward a differential demand model of sojourner adjustment," in *Intercultural communication theory (International and intercultural communication annual)*, ed. Richard L. Wiseman (London: Sage, 1995); Oliver Breiden, Alexander T. Mohr, and Hafiz R. Mirza, "An empirical test of a correspondence model of expatriate managers' work adjustment," *The International Journal of Human Resource Management* 17, no. 11 (2006).

¹¹ Jeffrey R. Edwards, "Person-job fit: A conceptual integration, literature review, and methodological critique," in *International review of industrial and organizational psychology*, ed. Cary L. Cooper and Ivan T. Robertson, *International review of industrial and organizational psychology; 0886-1528* (Oxford England: John Wiley & Sons, 1991); Amy L. Kristof, "Person-organization fit: An integrative review of its conceptualizations, measurement, and implications," *Personnel Psychology* 49, no. 1 (1996); Kristof-Brown, Zimmerman, and Johnson, "Consequences of individuals' fit at work: a meta-analysis of person-job, person-organization, person-group, and person supervisor fit."; Howard E. Tinsley, "The congruence myth revisited," *Journal of Vocational Behavior* 56, no. 3 (2000).

¹² Tinsley, "The congruence myth revisited," 150.

Dawis and Lofquist¹³ emphasised that an individual is embedded in different environments outside of work such as the home or school. They suggested that the principles of TWA are applicable to those other environments as well. Lofquist and Dawis¹⁴ later extended the TWA into a model that reaches beyond the work domain.

The P-E fit model is based on the assumption that any adjustment has an internal (individual needs) and an external (environmental requirements) dimension of demands that need to be met. The discussion will focus first on individual satisfaction. The subsequent paragraph will deal with satisfactoriness. Figure 3.1 below graphically depicts the proposed P-E-fit model of expatriate adjustment. With Grove and Torbiörn¹⁵ we assume that individuals have internal standards for mere adequacy that define the upper boundary of the range of tolerable discorrespondence.¹⁶ This means that any experienced discorrespondence above the level of mere adequacy leads to dissatisfaction and hence to active or reactive¹⁷ adjustment by the individual. Once adequacy is reached, the pressure for further adjustment eases. Reaching the range of tolerable discorrespondence will not lead to an immediate ceasing of adjustment activities for several reasons: first, momentum will cause a continuation and there will be only a gradual drop in adjustment activities in many cases; second, a person may want to be above the level of mere adequacy because tolerable is not the same as comfortable; and third, neither the needs of the individual nor the supplies of the environment are static. Therefore, what was above mere adequacy yesterday may no longer be so today.

¹³ Dawis and Lofquist, *A psychological theory of work adjustment: an individual-differences model and its applications*.

¹⁴ Lloyd H. Lofquist and René V. Dawis, *Essentials of Person-Environment-Correspondence Counseling* (Minneapolis: University of Minnesota Press, 1991).

¹⁵ Cornelius Lee Grove and Ingemar Torbiörn, "A new conceptualization of intercultural adjustment and the goals of training," *International Journal of Intercultural Relations* 9, no. 2 (1985).

¹⁶ Dawis and Lofquist, *A psychological theory of work adjustment: an individual-differences model and its applications*., TL in Fig. 2.6 in Chapter 2

¹⁷ Ibid.

The TWA model and its applications to non-work environments all deal with individuals in their home culture. A psychologically healthy adult is assumed to be in balance overall, at ease with him- or herself with an appropriate cognitive reference frame and able to interact effectively and appropriately. For this reason, the satisfaction-focused part of the TWA focuses exclusively on the correspondence of individual needs and environmental supplies. In crossing cultures, as expatriates do, the individual may encounter challenges that pose a threat to the overall psychological balance enjoyed at home. Hence, it is necessary to add an extension to the TWA model. There is a purely internal aspect that is expressed in the correspondence of a person's needs and capabilities. We use the term 'capabilities' instead of 'abilities' because it is wider and includes variables that are a 'given' in the home culture such as language. Contrary to a person in the home culture, an expatriate may or may not speak the local language to a degree that fulfils his or her needs. Therefore, there may be discorrespondence between individual needs and capabilities leading to dissatisfaction with self, triggering adjustment through language learning. The regular correspondence between individual needs and external supplies also applies. The physical and social environment has to be sufficient to meet the individual's standards of mere adequacy. Otherwise, the individual will be dissatisfied and will adjust in one of a number of ways: attempt to influence the environment to meet minimum standards; adjust his or her requirements by substituting desired need fulfilments by available ones, i.e. re-evaluate or reinterpret the environment (e.g. an American football fan abroad acquiring a taste for soccer) or by lowering standards of adequacy (e.g. the same fan enjoying games of the lesser developed American football leagues in Europe); or move to a more congenial environment such as moving to a different neighbourhood or returning home early.

An individual must also meet the requirements of the environment, which sets adequacy standards for the external dimension. Takeuchi¹⁸ has emphasized the importance of a variety of stakeholders. This is

¹⁸ Riki Takeuchi, "A critical review of expatriate adjustment research through a multiple stakeholder view: Progress, emerging trends, and prospects," *Journal of Management* 36, no. 4 (2010).

due to two reasons: first, every individual lives in several environmental domains¹⁹ each of which will have different stakeholders. Second, each separate environmental domain contains various actors that can be stakeholders in the expatriate's satisfactoriness. We assume that stakeholders, in parallel to the adjusting expatriate, also have standards of adequacy that define the upper boundary of the range of tolerable discorrespondence. In this case, the discorrespondence concerns the stakeholder's requirements for the expatriate and his or her abilities to meet them. While adjustment will take place one interaction at a time, sometimes with only one stakeholder involved, we suggest that treating stakeholder requirements and levels of adequacy at the aggregate level will suffice for the discussion of our theory of expatriate adjustment. Empirical research will have to collect individual stakeholder data and analyse them case by case or combine them into indices for the different environments.²⁰ Stakeholders communicate to the expatriate implicitly or explicitly and intentionally or unintentionally whether their standards have been met or not, thus prompting the expatriate to engage in active or reactive adjustment to meet requirements. Stakeholders may adjust their levels of adequacy and their demands based on the expatriate's attempts to meet them. A sustained honest but only moderately successful attempt by the expatriate to speak the local language may prompt the environment to lower demands and find alternatives that ease the related adjustment pressure on the expatriate. Expatriates may or may not be able to pick up environmental signals about satisfactoriness. They may choose to ignore signals about insufficient satisfactoriness and refuse to adjust. Further, expatriates' willingness to pick up and react to stakeholders' signals about external standards will vary by domain: they may

¹⁹ Adjustment to different environmental domains will be discussed briefly later in this chapter and be the main subject of Chapter 5.

²⁰ On a grand scale, this has been done at country-level in research on culture indicators Jagdeep S. Chhokar, Felix C. Brodbeck, and Robert J. House, eds., *Culture and leadership across the world - The GLOBE book of in-depth studies of 25 societies* (Mahwah, NJ: Lawrence Erlbaum Associates, 2007); Robert J. House et al., eds., *Culture, Leadership, and Organizations: The GLOBE Study of 62 Societies* (Thousand Oaks, CA: Sage, 2004); Geert Hofstede, *Culture's Consequences: Comparing Values, Behaviors, Institutions and Organizations Across Nations* 2nd ed. (Thousand Oaks, CA: Sage Publications, 2001).. A much smaller version will suffice for smaller aggregates.

be more willing to adhere to requirements related to work or sports and leisure activities than to things that touch upon areas that involve strongly held values such as religion, where they may decide not to adjust to external standards.

Figure 3.1: A P-E-fit model of expatriate adjustment

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To summarise the argument so far, expatriate adjustment is a P-E relationship. The expatriate lives in different environments where needs and supplies as well as needs and capabilities must be adequately balanced to experience satisfaction with the environment and with oneself, and requirements and capabilities must be adequately balanced for satisfactoriness. The pressure to adjust eases, but may not go away completely, once relevant adequacy levels have been reached. The next section deals with the different dimensions of adjustment that manifest themselves in every domain.

D-1: The dimensions of expatriate adjustment

The discussion in Chapter 2 showed that most current conceptualisations of adjustment distinguish cognitive, affective, and behavioural dimensions.²¹ The focus on cognitions, affects, and behaviours is

²¹ Arno Haslberger and Chris Brewster, "The 3-D model of expatriate adjustment: Dimensions, dynamics and domains," in *EIASM: 4th Workshop on Expatriation* (Las Palmas de Gran Canaria, Spain 2008); Colleen Ward, Stephen Bochner, and Adrian Furnham, *The psychology of culture shock*, 2nd ed. (London: Routledge, 2001); Margaret A. Shaffer et al., "You can take it with you: Individual differences and expatriate effectiveness," *Journal of Applied Psychology* 91, no. 1 (2006); Young Yun Kim, *Communication and Cross-Cultural Adaptation* (Clevedon, England - Philadelphia, PA: Multilingual Matters, 1988); Young Yun Kim, "Toward an interactive theory of communication-

common in the psychological literature, for example in theories of attitude formation.²² Attitudes include satisfaction.²³ Therefore, the correspondences that cause satisfaction and satisfactoriness in TWA terms and the resulting adjustment will have cognitive, affective and behavioural dimensions. Rather than being simply somewhere along the continuum from 'adjusted' to 'unadjusted' in a particular domain as suggested by the dominant model in management research on international assignments,²⁴ an expatriate is more or less adjusted in each of the dimensions of cognition, affect, and behaviour by meeting internal and external standards of adequacy for each dimension in each domain. This complicates the picture but makes it much more realistic. One expatriate may be quite knowledgeable about different aspects of the host country and thus cognitively adjusted, but may be very unhappy to be there; another may be affectively well adjusted, while knowing very little about the country and the language. Our conceptualisation of adjustment allows accounting for these differences, which the earlier model does not. That model would show the same moderate adjustment in both cases although in reality the adjustment pattern is diametrically opposed.

Expatriates adjust to their new situation and environment deliberately through conscious efforts and also through unplanned, perhaps even unconscious and automatic, reaction. Some of their adjustment

acculturation," in *Communication Yearbook*, ed. D. (ed.) Nimmo (New Brunswick, NJ: Transaction Books, 1979).

²² Richard J. Gerrig and Philip G. Zimbardo, *Psychology and life* 16th ed. (Boston, MA: Allyn and Bacon, 2002); Steven L. McShane and Mary Ann Von Glinow, *Organizational Behavior: Emerging Realities for the Workplace Revolution*, 4th ed. (Boston: McGraw-Hill Irwin, 2008).

²³ Jerald Greenberg, *Behavior in Organizations*, tenth ed. (Upper Saddle River, NJ: Pearson Education - Prentice Hall, 2011).

²⁴ Black, Mendenhall, and Oddou, "Toward a comprehensive model of international adjustment: An integration of multiple theoretical perspectives."

is anticipatory.²⁵ This can occur through their own efforts, by attending preparatory training sessions, for example, or through research, reading or meeting former expatriates from the country or nationals based in their own country, that create a change in attitude towards the future host context. The driver of anticipatory adjustment is first and foremost the discorrespondence of individual needs and capabilities because there is hardly immediate information available about environmental requirements and supplies before arrival, except for look-see visits. All other information is secondary. It is either of a historic nature based on the expatriate's prior experience in the host environment or it is information mediated through people such as trainers, nationals from the host country etc. and other sources such as books or videos. Some environmental requirements and supplies may be anticipated based on the available immediate or secondary information rooting anticipatory adjustment also in requirements-capabilities and needs-supplies discorrespondence. The bulk of adjustment, of course, takes place once immersed in the new environment. Here the environment also provides primary information, communicating requirements and supplies.

All adjustment occurs because there is an internal or external discorrespondence and the individual is willing to adjust. Not all expatriates may be willing to adjust.²⁶ Some of them will make no adjustment and either continue to try to operate as they did at home – or they will return home. Some of them will change their mind and decide to make 'enough' changes to cope with the new environment. Most will be willing to adjust. For the two latter categories, those who willingly or unwillingly realise that they have to change, when the extent of internal or external discorrespondence is in the intolerable range, i.e. below the level of adequacy, adjustment efforts will have high urgency. A shortfall in an internal

²⁵ Ibid.; Purnima Bhaskar-Shrinivas et al., "Input-based and time-based models of international adjustment: Meta-analytic evidence and theoretical extensions," *Academy of Management Journal* 48, no. 2 (2005).

²⁶ Philip G. Benson, "Measuring cross-cultural adjustment: The problem of criteria," *International Journal of Intercultural Relations* 2, no. 1 (1978); Paula M. Caligiuri, "Assessing expatriate success: Beyond just "being there"," in *New approaches to employee management*, ed. David M. Saunders and Zeynep Aycan (Greenwich, CT: JAI Press, 1997).

standard motivates the expatriate intrinsically to act or change,²⁷ while a shortfall in an external standard causes the environment to exert social control and put pressure on the expatriate to act or change.²⁸ For this external lack of satisfactoriness to be effective the expatriate first has to realise (internalise) that the discorrespondence is intolerable.

Once the range of tolerable discorrespondence has been reached adjustment may still occur, but with significantly reduced urgency. If efforts at adjustment show progress as expected, the path will be relatively smooth. But if progress is slower than anticipated or there are significant setbacks, the expatriate may slide into a crisis. The adjustment literature has discussed this crisis²⁹ under the heading of 'culture shock.'³⁰ Some of the stress literature uses the term 'adaptation' for changes as a result of a crisis, which include acquiring new resources and capabilities, reducing demands or changing the interpretation of experiences.³¹ We do not make this distinction for different types of

²⁷ Grove and Torbiörn, "A new conceptualization of intercultural adjustment and the goals of training."

²⁸ cf. Marshall H. Segall et al., *Human Behavior in Global Perspective: An Introduction to Cross-Cultural Psychology* (New York, NY etc.: Pergamon Press, 1990).

²⁹ Sverre Lysgaard, "Adjustment in a Foreign Society: Norwegian Fulbright Grantees Visiting the United States," *International Social Science Bulletin* 7, no. 1 (1955).

³⁰ Kalervo Oberg, "Cultural shock: Adjustment to new cultural environments," *Practical Anthropology* 7, no. 4 (1960); Sven Lundstedt, "An introduction to some evolving problems in cross-cultural research," *Journal of Social Issues* 19, no. 3 (1963); John T. Gullahorn and Jeanne E. Gullahorn, "An extension of the U-curve hypothesis," *Journal of Social Issues*, 19(3) (1963); William A. Smalley, "Culture shock, language shock, and the shock of self-discovery," *Practical Anthropology* 10, no. 2 (1963).

³¹ Joan M. Patterson, "Families experiencing stress," *Family Systems Medicine* 6, no. 2 (1988); Joan M. Patterson, "Integrating family resilience and family stress theory," *Journal of Marriage and the Family* 64(2002).

adjustment approaches. But it is necessary to list the range of adjustment approaches available to an individual to meet standards for the two types of satisfaction and for satisfactoriness.

The underlying drivers³² of adjustment are the individual's needs and their environmental equivalent, the external requirements. The individual's capabilities and responses must meet internal needs and external requirements and the environmental supplies must also meet the needs of the individual. Therefore, the first response to discorrespondence will be focused on the development of individual capabilities and on obtaining the right environmental supplies. Only if this does not lead to sufficient reduction in discorrespondence will the expatriate re-evaluate needs or try to change environmental requirements. It is perhaps stating the obvious to point out that the average individual has more control over him- or herself than over the environment. Therefore, adjustment is first a matter of personal development and only later a matter of influencing the environment. The two assertions taken together lead to the following conclusion: an average expatriate will first attend to developing new capabilities to meet needs and requirements. Only at a later stage will he or she try to change needs to reduce the needs-capabilities discorrespondence and try to influence external supplies and requirements.

First, satisfaction with self is internally evaluated. If the individual falls short of his or her own levels of adequacy, an expatriate can adopt one or more of the following adjustment approaches are available to reach an adequate level. He or she can:

- Change or learn in order to acquire new capabilities to meet his or her own standards;
- Re-evaluate and reinterpret the discorrespondence so that it is above adequacy;
- Lower adequacy standards so that the existing evaluation falls in the range of tolerable discorrespondence; or he or she can
- Leave the current circumstances to return to the last position in which capabilities met needs or move on to a new situation that is expected to lower discorrespondence. The last option

³² A. H. Maslow, "A theory of human motivation," *Psychological Review* 50, no. 4 (1943); Paul R. Lawrence and Nitin Nohria, *Driven: How Human Nature Shapes Our Choices* (New York, NY: Wiley, 2002).

seems contradictory since discorrespondence is based on an internal evaluation of own capabilities against own needs. But people are open systems and their capabilities, needs as well as any judgement about their correspondence is related to and influenced by the environment they are in.

Ignoring the internal (or external) signals which, on the surface, seems another option, is excluded by definition. By definition, intolerable discorrespondence cannot be ignored.

Second, the environment evaluates the satisfactoriness of the expatriate. Once again, the individual has options. The expatriate can react to a perceived inadequacy in a variety of ways. He or she can:

- Change or learn in order to acquire new capabilities to meet external standards;
- Re-evaluate or reinterpret of the discorrespondence or lower the standards. However, these are options that only apply indirectly as these are external perceptions – the expatriate may try, for example, to influence relevant stakeholders³³ so that they reinterpret their perceptions or lower their standards; or he or she can
- Leave the current circumstances for an environment where external demands and internal capabilities are more closely aligned.

Satisfaction with environmental supplies is internally evaluated. Available adjustment approaches depend on the influence the expatriate can exert over the environment in question. The physical environment such as climate, urban or rural setting, neighbourhood characteristics, type of accommodation, workplace, traffic, types of facilities for shopping and leisure available cannot be changed or, at least, will not change in the short term. It may be possible for the expatriate to lobby for better accommodation or for domestic help, but for most of the physical environment it must be endured as is. The social environment such as relationships with and support provided by friends, acquaintances and networks in and outside of work can be influenced. For both types of environment the following approaches are conceivable. The expatriate may:

³³ Nigel Nicholson, "A Theory of Work Role Transitions," *Administrative Science Quarterly*, 29, June (1984).

- Re-evaluate and reinterpret the discordance so that environmental supplies appear adequate;
- Lower his or her adequacy standards; or he or she may
- Leave the environment in question.

For the social environment, two more options are available:

- An expatriate may influence relevant others³⁴ to provide the needed supplies, including for example, various types of social support such as desired closeness and frequency of interaction or giving sufficient informational, instrumental, emotional, and feedback support.³⁵
- An expatriate who does not receive needed supplies from the social environment may be able and choose to acquire new capabilities that can fulfil needs the environment normally fulfils but has failed to do in this case. For example, company-assigned expatriates often get help in obtaining necessary permits for life in the new country. If a company provides no or inadequate support in this respect, an expatriate may develop an expertise in the legal dealings required and become self-sufficient.

Table 3.1 provides a summary of the possible adjustment approaches mentioned above:

³⁴ Ibid.

³⁵ Xiaoyun Wang and Rabindra N. Kanungo, "Nationality, social network and psychological well-being: Expatriates in China," *The International Journal of Human Resource Management* 15, no. 4-5 (2004).

Table 3.1

Correspondence	Needs → Capabilities	Requirements → Capabilities	Needs → Supplies
Standard	Internal	External	Internal
Focus of adjustment: i.e. demands to be met by:	Self (Internal → Internal) Capabilities	Self (External → Internal) Capabilities	Environment (Internal → External) Supplies
Adjustment approaches	<ul style="list-style-type: none"> – Acquire new capabilities; change or learn – Re-evaluate or reinterpret; change meaning – Lower adequacy standards – Leave 	<ul style="list-style-type: none"> – Acquire new capabilities – Influence others to: <ul style="list-style-type: none"> ○ Re-evaluate or reinterpret ○ Lower adequacy standards – Leave 	<p>For physical and social environment:</p> <ul style="list-style-type: none"> – Re-evaluate or reinterpret – Lower adequacy standards – Leave <p>For social environment only:</p> <ul style="list-style-type: none"> – Influence others to provide supplies/support – Acquire new capabilities to stand in for denied supplies

The default order of approaches was previously described as: first, the expatriate will try to develop new capabilities. Later, he or she will work on needs and on external supplies and requirements. This order may vary by adjustment domain and be influenced by individual differences. In the family

domain, for example, expatriates may not be willing to change themselves so much to adhere to host standards, but rather may prefer to influence the environment to apply different standards to them. The expatriate's prior history may prime him or her to try to influence the environment before making personal changes. An expatriate coming from a senior domestic job for example, who has enjoyed considerable discretion at work, is more likely to require change from the new work environment than a junior expatriate, who is accustomed to having little discretion.³⁶

Two of the correspondences in expatriate adjustment – *internal, focused on self and external, focused on self* – are concerned with the individual's ability to meet demands, i.e. have a self-focus, while the third correspondence – *internal, focused on others* – is about environmental supplies, i.e. has an other-focus, at least initially. In the discussions of cognitive, affective, and behavioural dimensions, we will combine the two self-focused aspects and treat the other-focus separately.

Satisfaction with self, satisfaction with the environment, and satisfactoriness of the expatriate in the eyes of the environment (or others in the environment) are the three attitudes that lie at the heart of adjustment. These attitudes have cognitive, affective, and behavioural dimensions, which correlate to some extent.³⁷ Nevertheless, as the discussion later will show, cognitive, affective, and behavioural adjustment may differ. One may be in the area of tolerable discrepancy, while the others may demand action before the level of adequacy is reached. What is tolerable is defined by the individual for satisfaction and by the environment (others) for satisfactoriness. Both individual expatriates and different environments, made up of various stakeholders, will have differing levels of adequacy.³⁸

³⁶ see: Nicholson, "A Theory of Work Role Transitions."

³⁷ cf. William B. Gudykunst and Mitchell R. Hammer, "Strangers and hosts - An uncertainty reduction based theory of intercultural adaptation," in *Cross-Cultural Adaptation - Current Approaches*, ed. Young Yun Kim and William B. Gudykunst (Newbury Park, CA: Sage, 1988).

³⁸ Grove and Torbiörn, "A new conceptualization of intercultural adjustment and the goals of training."

Cognitively, expatriates use their host-country related knowledge to understand and interpret the behaviour of members of the local environment as well as to guide their own behaviour. If understanding proves to be difficult and the knowledge that they have to guide their behaviour is insufficient or inconsistent,³⁹ expatriates will experience uncertainty.⁴⁰ People try to reduce uncertainty and increase predictability in interactions.⁴¹ This certainty or uncertainty represents the cognitive side of needs-capabilities correspondence (*internal, focused on self*). Members of the external environment will form their own views about the sufficiency of an expatriate's strength of knowledge to correctly understand and interact with them. In their interactions with the expatriate they will communicate explicitly or implicitly whether the expatriate's knowledge is sufficient. Take for example a member of an English-speaking host society that falls into talking to the expatriate in 'pidgin' English because the expatriate's spoken English or perhaps only his or her accent is poor. The expatriate-perceived sufficiency of knowledge as judged by the environment relates to the cognitive side of the requirements-capabilities correspondence (*external, focused on self*). In the event, the external environment may or may not provide the needed supplies to the expatriate. For example, a lack of

³⁹ Ibid.; Sandra J. Ball-Rokeach, "From pervasive ambiguity to a definition of the situation," *Sociometry* 36, no. 3 (1973).

⁴⁰ Charles R. Berger and Richard J. Calabrese, "Some explorations in initial interaction and beyond: Toward a developmental theory of interpersonal communication," *Human Communication Research*, Vol. 1, No. 2, Winter (1975); Charles R. Berger, "Beyond Initial Interaction: Uncertainty, Understanding, and the Development of Interpersonal Relationships," in *Giles, Howard; StClair, Robert N. (eds.): Language & Social Psychology* (Baltimore: University Park Press, 1979); Charles R. Berger, "Communicating under Uncertainty," in *Roloff, Michael E.; Miller, Gerald R. (eds.): Interpersonal Processes: New Directions in Communication Research* (Newbury Park, CA: Sage Publications, 1987); Charles R. Berger and William B. Gudykunst, "Uncertainty and Communication," in *Dervin, B; Voigt, M.J. (eds.): Progress in Communication Sciences, Vol. 10* (Norwood, NJ: ABLEX Publishing, 1991).

⁴¹ Berger and Calabrese, "Some explorations in initial interaction and beyond: Toward a developmental theory of interpersonal communication."

needed cognitive social support such as information or feedback will result in uncertainty because the expatriate will struggle to understand others and have problems with the interpretation of others' evaluations of their own capabilities and will find it hard to use this as a guide to their own behaviours. This uncertainty concerns the cognitive side of needs-supplies correspondence (*internal, focused on environment*). An example related to the physical environment is getting around in cities. The layout of many relatively young cities is straightforward and clear, while the layout of older cities sometimes is discombobulating and causes uncertainty for some expatriate drivers or pedestrians. The numbering of buildings in city streets in the UK generally runs from one end to the other, with even numbers on one side and odd numbers on the other; in the USA, street numbers often reflect the number of the crossing street so that building number 1617 may be followed not by building number 1618 but by building number 1701; in Japan, buildings tend to be numbered according to the order in which they were constructed.

Affectively, expatriates are also impacted by their feelings about the degree to which they are fitting in. "Core affect" denotes a person's overall feelings of pleasure or displeasure at a given strength or state of activation.⁴² Evidently, people have an internal standard to judge whether they are feeling good or bad. As people "generally (but not always)" seek to "maximize pleasure and minimize displeasure"⁴³ they are motivated to bring their feelings in line with their minimum standards. Whether expatriates possess the capabilities to meet their own needs will influence their core affect. The resulting positive or negative feelings and activation represent the affective side of needs-capabilities correspondence (*internal, focused on self*). Cultures have differing standards for the type and strength of feelings that may be displayed in various situations, e.g. in the workplace.⁴⁴ The applicability and extent of

⁴² James A. Russell, "Core affect and the psychological construction of emotion," *Psychological Review* 110, no. 1 (2003).

⁴³ *Ibid.*, 149.

⁴⁴ Fons Trompenaars, *Riding the Waves of Culture: Understanding Cultural Diversity in Business* (London: Nicholas Brealey Publishing, 1993).

coverage of these rules also differs by culture.⁴⁵ Emotional display rules provide an external standard for feelings. They define the extent to which actors must manage their feelings and perform emotional labour.⁴⁶ Individuals as open systems compare how they feel with those around them, e.g. fellow expatriates, and are concerned when those they perceive as similar do not share their feelings.⁴⁷ This may prompt them to perform emotional labour to fall in line. In host cultures that have very different emotional display rules from the ones the expatriate is used to, he or she has to undertake additional emotional labour as well. As with knowledge the environment communicates explicitly or implicitly the rules of emotional display. An example would be the way that, in societies that expect strict control of emotions, exuberant displays of joy by a couple of expatriates after winning an important client contract would be greeted by locals with embarrassed smiles. Aware expatriates would perceive this and feel uncomfortable in turn. The expatriate-perceived correctness of emotional display as judged by the environment relates to the affective side of requirements-capabilities correspondence (*external, focused on self*). The extent to which the environment provides for the needs of an expatriate, e.g. the extent of needed social support, will influence his or her core affect. The resulting positive or negative feelings and activation represent the affective side of needs-supplies correspondence (*internal, focused on environment*). Regarding the physical environment, unfamiliar

⁴⁵ A. E. Raz and A. Rafaeli, "Emotion management in cross-cultural perspective: "Smile Training" in Japanese and North American service organizations," in *Research on Emotion in Organizations*, ed. Charmine E. Härtel, Neal M. Ashkanasy, and Wilfred J. Zerbe (Oxford: JAI Press, 2007).

⁴⁶ Arlie Russell Hochschild, *The Managed Heart: Commercialization of Human Feeling*, 20th anniversary ed. (Berkeley, CA: University of California Press, 2003); J. Andrew Morris and Daniel C. Feldman, "The dimensions, antecedents, and consequences of emotional labor," *Academy of Management Review* 21, no. 4 (1996); Blake E. Ashforth, "Emotional labor in service roles: The influence of identity," *Academy of Management Review* 18, no. 1 (1993).

⁴⁷ Michael A. Hogg, "Social identity theory," in *Encyclopedia of Social Psychology*, ed. Kathleen Vohs and Roy Baumeister (Los Angeles: Sage Publications, 2007); Michael A. Hogg, "A social identity theory of leadership," *Personality & Social Psychology Review* 5, no. 3 (2001); Henri Tajfel, "Social psychology of intergroup relations," *Annual Review of Psychology* 33(1982).

weather patterns such as long winter nights, extreme temperatures, or continually cloudy skies may negatively influence an expatriate's core affect, while other weather patterns may be experienced as pleasant with a positive impact on core affect.

The third dimension of adjustment concerns *behaviours*. The extent to which people are able to fulfil their needs influences their sense of effectiveness. In order to be effective in meeting their needs, they must have sufficient capabilities to reach their goals. The sense of effectiveness resulting from needs fulfilment through one's own efforts represents the behavioural side of needs-capabilities correspondence (*internal, focused on self*). An expatriate may be quite effective in reaching his or her goals, but in the process may violate various host norms, i.e. may behave inappropriately from the host culture's point of view. There is an independent external standard of appropriateness that may or may not overlap with an expatriate's behaviour that leads to desired outcomes. As another, and sometimes fraught, example, the idea of what is formally-required gift-giving, what is friendly gift giving, and what constitutes bribery, and where the line between them falls, varies from country to country. The expatriate's home-based approach may not be seen as appropriate in the host location. Again, members of the host society will send explicit and implicit signals as to what is appropriate and what is not that need to be picked up by the expatriate. The expatriate-perceived appropriateness as judged by the environment relates to the behavioural side of the requirements-capabilities correspondence (*external, focused on self*). An expatriate's needs fulfilment depends not only on his or her capabilities but also on the supplies provided by the environment. Therefore, the behavioural effectiveness of the expatriate depends on external supplies, too. An expatriate, who receives adequate instrumental support, will be more effective than one who does not. Take the real-life example of an expatriate family, who moved to Germany from overseas and did not receive a car upon arrival. They had to buy their car locally, which was easily done. But to register the car they had to have their residency papers, which took a month to come through. The lack of instrumental support forced them to go grocery shopping by taxi. The expatriate employee had to endure a fairly lengthy commute from a poorly connected suburb on public transportation before the car could be registered. The sense of effectiveness resulting from needs fulfilment through external support represents the behavioural side

of needs-supplies correspondence (*internal, focused on environment*). The physical environment equally may support an individual's needs thus fostering behavioural effectiveness. If an expatriate is an avid skier but the physical environment provides no mountains and/or snow, attempts at skiing with regular equipment will be rather ineffective (and foolish, too). If the environment allows for running, the expatriate may adjust his or her needs and substitute running for skiing thus re-establishing a sense of effectiveness regarding sports pursuits.

Table 3.2 provides a summary of the cognitive, affective, and behavioural adjustment indicators:

Table 3.2

Correspondence	Needs → Capabilities	Requirements → Capabilities	Needs → Supplies
Standard	Internal	External (as perceived by the expatriate)	Internal
Focus of adjustment	Self	Self	Environment
Cognitive indicator	Certainty - uncertainty	Sufficiency – insufficiency of knowledge	Certainty - uncertainty
Affective indicator	Positive – negative core affect	Correctness – incorrectness of emotional display	Positive – negative core affect
Behavioural indicator	Effectiveness - ineffectiveness of capabilities-enabled behaviour	Appropriateness – inappropriateness of own behaviour	Effectiveness - ineffectiveness of supplies-enabled behaviour

Core affect is a generalised, overall concept. There are no two core affects one relating to needs-capabilities correspondence and the other relating to needs-supplies correspondence. People will experience one core affect that may be influenced in opposite directions by the two correspondences. Therefore, any empirical operationalization of the concept will have to capture the separate influences of the two correspondences on core affect.

In Chapter 4 we will revisit the three dimensions of adjustment and provide additional depth to the analysis.

D-2: The domains of expatriate adjustment

The distinction of the cognitive, affective, and behavioural dimensions of expatriate adjustment is necessary for a deeper understanding of the phenomenon. But it is not sufficient for a complete understanding because people live their lives in different spheres. For our focus on expatriate employees the most fundamental distinction will be the dichotomy of work and non-work.⁴⁸ An expatriate employee has to adjust to the new work environment and job on the one hand. He or she also has to re-create his or her private life, make new acquaintances and friends to replace the social contacts left in the home country. Adjustment to work may proceed quickly, with the expatriate being up to speed and performing as expected. The development of a social network outside of work may turn out to be harder, taking a long time and being rife with frustrations. Another expatriate may experience the opposite, a smooth transition in the non-work sphere, but a harder time in getting adjusted at work.

⁴⁸ cf. Mila Lazarova, Mina Westman, and Margaret A. Shaffer, "Elucidating the positive side of the work-family interface on international assignments: A model of expatriate work and family performance," *Academy of Management Review* 35, no. 1 (2010).

The distinction between the work and the non-work sphere adds detail to the analysis and understanding of expatriate adjustment. But as a dichotomy the distinction is still rather crude. Sociologists, for example, distinguish different ‘institution-based “sub-worlds”’.⁴⁹ These multiple sub-worlds are abstracted from individuals and based on the institutional environment. A focus on the individual, on the other hand, shows that each individual lives in a distinct ‘life-world’⁵⁰ that describes the individual’s action and communicative horizon and defines the space for an individual’s construction of meaning. The division between sub-world and life-world suggests two ways of developing distinctions between life spheres: first, a more abstract deductive one that stems from an institutional analysis of sub-worlds; and second, a more concrete inductive one that starts with individuals’ life-worlds. A life-world is a holistic concept. It does not distinguish different spheres the individual acts in. The smallest unit of an individual’s life that is relevant for the analysis of expatriate adjustment is the situation. Situational analyses have been common in the analysis of intercultural contact for some time.⁵¹ For Habermas “a *situation* represents a slice of a life-world isolated with regard to a particular topic”.⁵² Based on individuals’ recollections of situations and their summarized views of the spheres relevant for their adjustment that are based on such recollections it is possible to

⁴⁹ Peter L. Berger and Thomas Luckmann, *The social construction of reality* (New York: Anchor Book - Doubleday, 1989). 138.

⁵⁰ Jürgen Habermas, *Theorie des kommunikativen Handelns - Zur Kritik der funktionalistischen Vernunft*, 2 vols., vol. 2, suhrkamp taschenbuch wissenschaft (Frankfurt am Main: Suhrkamp, 1995). 171ff.

⁵¹ cf. Joseph P. Forgas, "Episode Representations in Intercultural Communication," in *Kim, Young Yun; Gudykunst, William B.: Theories in Intercultural Communication* (1988); Cynthia Gallois et al., "Communication Accommodation in Intercultural Encounters," in *Kim, Young Yun; Gudykunst, William B.: Theories in Intercultural Communication* (1988).

⁵² Habermas, *Theorie des kommunikativen Handelns - Zur Kritik der funktionalistischen Vernunft*, 2: 194., italics in the original, translation by the authors

inductively derive appropriate domains for the analysis of adjustment. Following Navas et al.⁵³ who provide a deductively derived structure, we use the term ‘domain’ to denote ‘a specified sphere of activity or knowledge’⁵⁴ or ‘a particular environment or walk of life’.⁵⁵ Domains represent a halfway house between the overwhelming detail of discrete situations or interactions and an overly simplified holistic view of an expatriate’s life abroad and adjustment to it. In Chapter 5 we will discuss in some depth deductively and inductively derived domains of adjustment.

D-3: The dynamics of expatriate adjustment

Adjustment, as we have noted, is not a singular event but rather a complex process over time. Its complexity is the reason for the difficulties in predicting it. The U-curve and similar hypotheses have been standard features in the literature at least since Lysgaard’s study of Norwegian Fulbright grantees in the United States.⁵⁶ Equally standard are the criticisms of the concept as inaccurate and unsuitable for prediction.⁵⁷

⁵³ Marisol Navas et al., "Relative Acculturation Extended Model (RAEM): New contributions with regard to the study of acculturation," *International Journal of Intercultural Relations* 29(2005);

Marisol Navas et al., "Acculturation strategies and attitudes according to the Relative Acculturation Extended Model (RAEM): The perspectives of natives versus immigrants," *International Journal of Intercultural Relations* 31(2007).

⁵⁴ New_Oxford_American_Dictionary, New Oxford American Dictionary, (supplied with Apple OS X Version 10.8.3).

⁵⁵ First meaning in: www.wolframalpha.com, "Domain," <http://www.wolframalpha.com/>.

⁵⁶ Lysgaard, "Adjustment in a Foreign Society: Norwegian Fulbright Grantees Visiting the United States."

⁵⁷ Lundstedt, "An introduction to some evolving problems in cross-cultural research."; Kenneth H. David, "Intercultural Adjustment and Applications of Reinforcement Theory to Problems of ,Culture Shock'," *trends*, Vol. 4, No. 3, January (1972); Austin T. Church, "Sojourner Adjustment,"

The process of adjustment is complex for various reasons. First of all, there are many possible variables that might influence it. A review of the literature produces scores, if not hundreds, of variables involved in cross-cultural adjustment (see Chapters 2, 7, and 8 for further information). The sheer number of variables and their possible values creates combinatorial complexity.⁵⁸ This type of complexity is manageable principally with more powerful computers or with appropriate analytical methods of data reduction. Yet, the complexity challenge posed by expatriate adjustment does not end here. As already mentioned and elaborated upon in Chapter 4, each of the three dimensions of adjustment has at least an internal aspect that is assessed by the expatriate and an external aspect that is assessed by other people and perceived and taken into account by the expatriate. These two aspects feed back onto each other so that the internal and external facets of cognitive, affective, and behavioural adjustment influence each other over time. Any social interaction may change the balance of internal and external adjustment levels. This introduces dynamic complexity into the picture and makes a simple prediction of adjustment impossible.⁵⁹ Complexity analysis is in some cases able to

Psychological Bulletin, Vol. 91, No. 3 (1982); Adrian Furnham, "The Adjustment of Sojourners," in *Cross-Cultural Adaptation - Current Approaches*, ed. Young Yun Kim and William B. Gudykunst (Newbury Park, CA: Sage, 1988); Young Yun Kim and Brent D. Ruben, "Intercultural Transformation - A Systems Theory," in *Theories in Intercultural Communication*, ed. Young Yun Kim and William B. Gudykunst (Newbury Park, CA: Sage, 1988); J. Stewart Black and Mark Mendenhall, "The U-Curve Adjustment Hypothesis Revisited: A Review and Theoretical Framework," *Journal of International Business Studies*, Second Quarter (1991); Colleen Ward et al., "The U-curve on Trial: A Longitudinal Study of Psychological and Sociocultural Adjustment During Cross-cultural Transition," *International Journal of Intercultural Relations* 22, no. 3 (1998).

⁵⁸ John D. Sterman, "System Dynamics Modeling: Tools for Learning in a Complex World," *California Management Review* 43(2001).

⁵⁹ *Ibid.*

find a systematic pattern at a meta-level, which is called a 'strange attractor'.⁶⁰ With appropriate data sets predictable meta-level patterns may be detectable. The adjustment levels in different domains are interdependent, too, as the work-family interface literature, for example, shows.⁶¹ An expatriate's successful work adjustment will have a positive impact on non-work adjustment and vice versa, all else being equal. The literature on expatriate partners and families attests to the dynamic adjustment-related links between individuals expatriating together. Yet another source of complexity is the causal ambiguity of cross-cultural adjustment. Adjustment outcomes such as affective wellbeing will in turn influence antecedents of adjustment such as language skills because a feeling of wellbeing will motivate the expatriate to further study the host language and improve fluency. A final area of attention is the 'sensitivity to initial conditions'⁶² and the related 'path dependence'⁶³ of the adjustment process. Complexity researchers have shown that minute variations in the starting point in simple dynamic equation systems have major consequences at later stages.⁶⁴ An expatriate, who successfully navigates a relatively smooth transition in the first few weeks abroad may be launched on an entirely

⁶⁰ L. D. Kiel and E. Elliott, "Exploring Nonlinear Dynamics with a Spreadsheet: A Graphical View of Chaos for Beginners," in *Chaos Theory in the Social Sciences*, ed. L. D. Kiel and E. Elliott (Ann Arbor, MI: Michigan University Press, 1997).

⁶¹ cf. Jeffrey R. Edwards and Nancy P. Rothbard, "Mechanisms linking work and family: Clarifying the relationship between work and family constructs," *Academy of Management Review* 25, no. 1 (2000).

⁶² J. Gleick, *Chaos - The Amazing Science of the Unpredictable* (London: Vintage, 1998).

⁶³ for an example of path dependence analysis see: James N. Baron, Michael T. Hannan, and M. Diane Burton, "Building the iron cage: Determinants of managerial intensity in the early years of organizations," *American Sociological Review* 64, no. 4 (1999); Christine M. Beckman and M. Diane Burton, "Founding the future: Path dependence in the evolution of top management teams from founding to IPO," *Organization Science* 19, no. 1 (2008); James N. Baron and David M. Kreps, *Strategic human resources: Frameworks for general managers* (Hoboken, NJ: Wiley & Sons, 1999).

⁶⁴ Kiel and Elliott, "Exploring Nonlinear Dynamics with a Spreadsheet: A Graphical View of Chaos for Beginners."

different and more agreeable adjustment course than an expatriate who has to weather various storms early on, even if both face similar situations from then on. If the expected path dependency of expatriate adjustment can be shown in empirical research, common-sense arguments for preparatory training and solid support early on in the assignment will gain evidence-based credence.

After we have staked out the territory of cross-cultural adjustment with our 3-D model we can now move on to discussing in turn the cognitive, affective, and behavioural dimensions of adjustment.

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