

Predicting Expatriate Adjustment Israel as a Host Country

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ABSTRACT This study assumes that the frequently applied model, developed in North America, predicting expatriate adjustment to foreign host countries is applicable cross-nationally. This assumption is tested using Israel as a host country, an environment far removed from North American culture, and one that represents a particularly highly heterogeneous society in values, ethnic identities, languages, and religions. Expatriates from 14 different countries stationed in Israel were studied during the term of their foreign assignment. Tested were various behavioral and attitudinal constructs, which include personal, cultural, and work variables. Despite the cultural milieu Israel poses, the predictive model was reconfirmed in most of its aspects. As expected, the findings indicated that spouse's adjustment and expatriate's adjustment are highly correlated. However, it was found that interaction adjustment and environmental adjustment are two distinct processes and are predicted by different behavioral and attitudinal attributes. Work adjustment constitutes a separate criterion and can be predicted by work attitudinal variables. The theoretical and applied implications of these findings are discussed.

KEY WORDS • environmental adjustment • expatriate adjustment • interaction adjustment • Israel

The process of globalization has compelled organizations to face new challenges associated with cross cultural interactions and, in particular, a growing need to implement new

management practices. The establishment of joint ventures, foreign subsidiaries, international strategic alliances and overseas representative offices has been accompanied by a

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combination of adaptive management procedures, such as recruiting local workers, employing third-country nationals and moving international workers, resulting in the overseas relocation of a large number of employees.

Multi-national corporations (MNCs) consistently employ strategies designed to increase global expansion and are therefore based on increased use of expatriates. Indeed, overseas operations of MNCs have gained significance in generating profits for these firms, with over 40% of corporate revenues are generated away from the home country (Bartlett and Ghoshal, 1990; Sinangil and Ones, 2003). There is good reason to assume that global expansion is likely to continue, and with it, the intensive use of expatriates, particularly in developing countries (Shackleton and Newell, 1997). MNCs are increasingly realizing that success in global competition is related to the quality and effectiveness of managing multinational human resources at home and abroad (Black, Mendenhall and Oddou, 1991; Scullion and Brewster, 2001; Tung, 1998).

Yet, despite the growing need for expatriates (Punnett, 1997), willingness of managers to assume overseas assignment has reduced. This creates a challenge for MNCs in maintaining a desirable level of candidates recruited for the purpose of relocation into foreign assignments (Andersen, 2003; Selmer, 2001). This reduced willingness is assumed to be the result of three factors: (1) Compensation packages have been reduced; (2) Repatriation is expected to entail difficulties; and (3) Complexity associated with dual-career families (Punnett, 1997). The ever growing need for expatriates combined with the decrease in willing candidates call for future research in the realm of expatriation in order to reduce this gap by means of expatriate selection and training.

It seems clear that the effectiveness of expatriates, also known as *foreign assignees* (Ronen, 1989), is highly dependent on their adjustment to their new work surroundings, the new culture and the different way of life

to which they are exposed. Indeed, literature from the last two decades concerning expatriation highlights two 'alarming' facts. First, the cost of sending expatriates and their families abroad is high. Second, the rate of expatriate failure is similarly high. The last point is evident in the large number of expatriates who fail to make a successful transition to their new environment and return home prior to the completion of their mission (Alder, 1986; Black, 1988; Black and Stephens, 1989; Mendenhall and Oddou, 1985; Ronen, 1989; Tung, 1982). It is for these reasons that research on expatriation practices and expatriate adjustment flourished during the 1980s and 1990s.

Past studies have paid limited attention to the multiplicity of possible criteria of expatriates' success. Rather, these studies have used a general dichotomous approach, such as *success-failure* in completing the assignment, or focused exclusively on the expatriate's *job performance* as the major significant criterion, while neglecting other relevant experiences, such as the expatriate's own personal experience during the cross-cultural transition (Benson, 1978; Harris, 1975; Ones and Viswesvaran, 1997; Ronen, 1989). This concern produced a shift in the research towards studying expatriates' *adjustment*, which is now believed to reflect the psychological experience that is the cause of other behavioral outcomes, such as performance or turnover (Alder, 1983; Black, 1988; Mendenhall and Oddou, 1985).

Following previous research we consider expatriate adjustment as the process by which employees sent overseas become comfortable with, or acculturated to the host country and experience psychological comfort with various aspects of the host environment in a manner which allows them to achieve reduced conflicts and increased effectiveness (Aycan, 1997; Black and Gregersen, 1991; Black et al., 1991; Brewster, 1993; Gregersen and Stroh, 1997; McEvoy and Parker, 1995; Torbiorn, 1982). From the perspective of

the home country headquarters, successful adjustment of expatriates is expected to increase performance level and to facilitate completion of the overseas assignment (Parker and McEvoy, 1993). From the perspective of the individual manager, adjustment is conceived as the major contributor to job attitude and general psychological well being of expatriate employees as well as their families (Aryee and Stone, 1999).

Recently, a variety of new issues were raised considering the process that might affect expatriates' success overseas. One such consideration is the reaction of the organization's host country nationals to the expatriates (Toh and Denisi, 2003). Although the predictive model was developed in North America and is ostensibly applicable cross-nationally, the specific home or host country climates, each enfolding unique conditions and norms, may also affect incoming expatriates in particular ways. For example, it is yet to be determined if the adjustment process of expatriates into East European countries is similar to their adjustment process elsewhere (Cyr and Schneider, 1996; Scullion and Brewster, 2001). The generalizability of results obtained in hosting societies other than North American, then, is still questionable.

Israel, the host country in this study, is a unique country in its multicultural environment. Israeli culture comprises an immigrant society of people originally coming from some 70 countries. It is characterized by high social, economic, and political polarization and by intense passages between states of war and peace. These features are translated into high cultural diversity, a mixture of different values and behavioral patterns, high uncertainty and volatility which, importantly, all coexist in a small area. Thus, it is not a *single* culture to which an expatriate must adjust, but rather a *spectrum of cultures*. While other countries, such as the United States, India, or Belgium, are also multicultural, mainstream cultural diversity is either smaller than in Israel (as in the US), or the

space within which this diversity exists is considerably larger than Israel (as in India). The intensity of cultural diversity in Israel is thus inescapable. This study examines whether the North American model can be applied – partially or in full – in such a unique cultural environment. In addition, it offers a glimpse into the previously unrepresented realm of expatriation in Israel.

The present research is partially based on the expatriate adjustment framework suggested primarily by Black, Mendenhall and Oddou (1991) and on its original form that was integrated into a single comprehensive model in the literature concerning job transfer and adaptation within one's own country (e.g., Feldman, 1976; Feldman and Brett, 1983; Jones, 1986; Louis, 1980; Nicholson, 1984; Pinder and Schroeder, 1987). It seems that both types of transitions involve leaving a familiar setting and entering an unfamiliar one – a process accompanied by psychological uncertainty. It has been suggested that various factors relating to these uncertainty levels may either inhibit or facilitate adjustment subsequent to the transfer. The literature on domestic transfer has emphasized the importance of job-related variables as antecedents of adjustment. Since the international transfer involves changes both in work and non-work contexts, it seems appropriate to utilize both these variables for predicting international adjustment.

Adjustment has been conceptualized in two different ways. The first is the degree of psychological adjustment experienced by the individual in a new situation (e.g., Mendenhall and Oddou, 1985). The second employs more objective terms, such as performance ratings (e.g., Early, 1987; Hawes and Kealey, 1981). Literature on domestic transfer typically emphasizes the importance of job-related variables as antecedents of adjustment. The present study, however, employs the first concept, assuming that adjustment is an affective psychological response to the new environment, and variables such as job per-

formance and turnover should be thought of as outcome variables potentially affected by adjustment.

Within this framework, adjustment is specifically conceived as a multi-faceted phenomenon (Black, 1988; Black and Stephens, 1989; Black et al., 1991) with three distinct facets: *Environmental adjustment*, *Interaction adjustment* and *Work adjustment*. *Environmental adjustment* (sometimes called *general* or *non-social adjustment*) refers to the extent to which expatriates are able to adapt to the main environmental and physical aspects of the new culture. It includes reactions to food, transportation system, living conditions, entertainment, cost of living, weather, etc. *Interaction adjustment* refers to the extent to which expatriates socialize or become acquainted with host nationals. *Work adjustment* is the extent to which expatriates feel comfortable with their new job and its requirements. This multi-faceted conceptualization of expatriate adjustment has been confirmed in several studies (Shaffer and Harrison, 1998, 2001; Shaffer, Harrison and Gilley, 1999). We expect that the complexity of the Israeli cultural environment would inhibit previously established effects of expatriate adjustment variables. The heterogeneity of values, ethnic identities, languages, and religions in Israel is expected to generate wider variability between the expatriate and each of Israel's characteristic than between the expatriate and the same characteristics in more homogeneous host countries. For example, expatriates originating from countries where monotheism is prevalent could find the religious diversity in Israel either stimulating or intimidating. Thus, it is clear that diversity presents both an intellectual and emotional challenge to the expatriate, although it is difficult to predict how it would affect his or her adjustment to the host country.

Four groups of variables have been proposed as predictors of adjustment: 'individual variables', 'job variables', 'cultural distance', and 'spousal adjustment'.

Individual variables: In the effort to distinguish successful expatriation, several researchers attempted to capture the so-called 'international personality' that possesses the appropriate traits and skills supporting an effective adjustment process (Brein and David, 1971; Church, 1992; Mendenhall and Oddou, 1985). Although there has recently been a general agreement about what constitutes an 'international personality', a more appropriate operational definition is still needed. Caliguri (1992) developed a measure, *International Orientation Scale (IOS)*, based on the assumption that certain behaviors individuals exhibit before moving overseas are indications of underlying attitudes, which may predict the level of cross-cultural adjustment abroad.

The IOS is composed of four domains: 1. *Participation in cultural events* assessed intellectual curiosity and interest in foreign cultures. People high on this variable exhibit a strong interest in culture through their current activities: they enjoy eating in foreign restaurants or going to performances by foreign artists. For them, living abroad is an opportunity to experience similar cultural activities. 2. *Foreign experience* measures the extent to which a person has sought out to participate in foreign experiences, such as studying a foreign language or traveling abroad. The pursuit of such activities indicates a greater interest in foreign experiences which may facilitate adjustment. 3. *Comfort with differences* evaluates the variability of the individual's friends and acquaintances. People who choose to associate exclusively with people similar to themselves are assumed to be less comfortable with the differences in others, as expressed by their education level, race, religious background, age, and socioeconomic status. It is assumed that people already comfortable with having friends who are different from themselves, are more likely to be successful abroad. 4. *International attitudes* are the individual's thoughts and feelings towards people of other cultures and towards cross-

cultural experiences. People with positive international attitudes have a high desire for foreign experiences (such as assuming an overseas assignment or hosting a foreign exchange student). They value cultural involvement and cultural appreciation. Overall, people high on this dimension may be more likely to succeed abroad because they may be expected to embrace the foreign experience with open minds and positive attitudes (Caliguri, 1992: 10–12). In addition, we believe that the psychological comfort experienced by those expatriates that adjust successfully will contribute to their overall satisfaction.

Hypothesis 1a: Participation in cultural events is positively related to environmental and interaction adjustment as well as to the expatriate's overall satisfaction.

Hypothesis 1b: Foreign experience is positively related to environmental and interaction adjustment as well as to the expatriate's overall satisfaction

Hypothesis 1c: Comfort with differences is positively related to environmental and interaction adjustment as well as to the expatriate's overall satisfaction.

Hypothesis 1d: International attitudes is positively related to environmental and interaction adjustment and as well as to the expatriate's overall satisfaction.

Job variables: As mentioned earlier, literature on domestic job transfers underlines the importance of job variables in relation to adjustment. The following variables are assumed to be related to adjustment due to their ability to reduce or increase uncertainty (Black et al., 1991): 1. *Role conflict*, which is related to employees' experience of conflicting signals about what is expected of them. 2. *Role ambiguity*, which is defined in terms of the existence or clarity of job requirements. Past research indicates that the higher the conflict and ambiguity in the new job, the more difficult the adjustment to it (Black, 1988; Pinder and Schroeder, 1987). 3. *Role novelty* is the perceived difference between the

past role and the new one. A certain amount of novelty in any new role is a positive feature, since it breaks down routines, adds challenge, and enriches one's job. In the case of an international assignment, however, it is assumed that role novelty may exacerbate the degree of unfamiliarity with the new role and decrease predictability, to the extent that the new role is not perceived positively and subsequently undermines adjustment. This is supported by past research, indicating a negative relationship between role novelty and the expatriate's adjustment (Black, 1988; Black et al., 1991; Pinder and Schroeder, 1987). 4. *Role autonomy* is the degree to which employees have the freedom to modify their new role to fit their abilities and habits. As a result, the role becomes more familiar, predictable and controllable, and uncertainty is reduced (Black, 1988). On the basis of previous findings:

Hypothesis 2: Job variables that increase uncertainty (role conflict, role ambiguity and role novelty) inhibit work adjustment, while job variables which reduce uncertainty (role autonomy) will facilitate work adjustment.

Cultural distance, also known as culture 'novelty', is the extent to which the host country differs from the expatriate's own culture. It is assumed that the cultural conditions of the new environment may increase expatriates' anxiety and uncertainty in the host country as a result of the perceived degree of difference between the host and the expatriate home culture (Caliguri, 1992; Church, 1982; Mendenhall and Oddou, 1985).

Hypothesis 3: Cultural distance is negatively related to the expatriate environmental and interaction adjustment as well as to the expatriate's overall satisfaction.

Spousal adjustment: The presence of a spouse or other family members has been shown to have an impact on the expatriate adjustment process. Successful adjustment of family members influences expatriate success abroad (Black, 1988; Black and Stephens, 1989;

Lanier, 1979; Pinder and Schroeder, 1987). American MNC's cite the difficulty of the spouse to adjust to the foreign country as a major reason for the lack of adjustment of American expatriates and the resulting higher probability of returning prematurely from the overseas assignment (Black and Stephens, 1989; Tung, 1981). In particular, it would be interesting to find out whether this relationship still prevails in a multiculturally diversified country such as Israel. Following this:

Hypothesis 4: Spousal environmental and interaction adjustment is positively related to the expatriate's environmental and interaction adjustment as well as to the expatriate's overall satisfaction.

Method

Sample

Participants in this study were foreign expatriates on a temporary assignment in Israel during and after the first Gulf War whose children attended the American International School (AIS) in Israel. AIS was selected to target expatriates in Israel as most foreign families stationed in the country prefer to ensure continuity of education by sending their children to the English-speaking school, which is a part of a worldwide school net. A package consisting of the research questionnaires, a letter from the researchers, a letter from the school's superintendent, and a return envelope were mailed to the participants. Of 150 questionnaires distributed to the expatriate candidates, 47 were returned useable, with a response rate of 31%. Although less than expected, this is an acceptable response rate relative to other international studies (Black, 1990; Black and Stephens, 1989). In addition to the questionnaire to the expatriate, a questionnaire for the spouse was also included with explicit instructions for the spouse to complete this questionnaire separately. Forty spouse questionnaires were returned. The final sample

included expatriates from 14 different countries of origin: twenty-one from the US, eight from South Africa, four from England, two from each of these countries: Australia, India, Japan, and Kenya, and one from each of these: Ethiopia, France, Germany, Hungary, Liberia, Switzerland, and Tanzania. There were 40 men and seven women in the expatriate sample. In age respondents averaged 44 years ($SD = 5.90$) and their spouses 40 years ($SD = 6.64$). Forty-six of the respondents were married, one divorced. Six were Jewish. The average annual compensation package of the respondents was approximately US\$75,000. The expatriates in the final sample represented different types of organizations, from both the governmental and private sectors, and held various positions and occupations (31% technical or technological occupations, 22% civil and public servants, 16% managerial occupations, and 16% tutoring and research occupations) in a variety of fields. Their average length of stay in Israel at the time of the study was 31 months ($SD = 24.93$).

Measures

The questionnaire filled in by the expatriates held 137 items, and the questionnaire for the expatriates' spouses included 39 items. The variables measured in these questionnaires are described below.

Predictor variables *International orientation:* The IOS developed by Caliguri (1992) was adopted. The questionnaire is divided into four domains with items measured on 5-point scales: 1. *Participation in cultural events* (eight items, e.g., 'Back home, I attended ethnic festivals'); 2. *Foreign experiences* (five items, e.g., 'Back home, I studied a foreign language'); 3. *Comfort with differences* (three items, e.g., 'Back home, my friends' ethnic backgrounds are . . . ' 1. 'Similar' to 5. 'Extremely different'); 4. *International attitudes* (five items, e.g., 'Traveling the world is a high priority in my life'). High scores obtained from IOS and its

dimensions indicated higher international orientation.

Job variables: Four subscales were used to measure the contribution of job variables to the expatriate's adjustment, all using 5-point Likert scales: 1. The Role Conflict subscale was developed by Rizzo, House and Lirtzman questionnaire (1970) (eight items, e.g., 'I receive incompatible requests from two or more people'); 2. The Role Ambiguity subscale was also developed by Rizzo et al. (1970) (six items, e.g., 'I know exactly what is expected of me', reverse-coded); 3. Role Novelty was adopted from Black (1988) (eleven items, e.g., 'How similar or different are work responsibilities in your present job in Israel as compared to your previous job [before the transfer]?'); 4. Role Autonomy was measured by three items, generated specifically for this study (e.g., 'I have the freedom to do things in my own way'). High scores indicated high degrees of role conflict, role ambiguity, role novelty and role autonomy.

Cultural distance: Cultural distance assessments were based on the eight item measure developed by Torbiorn (1982) employing a 5-point Likert scale, in which respondents were asked to evaluate to what extent several aspects of their life in Israel were similar or different as compared to the same aspects back in their own country, e.g., 'Everyday customs that must be followed'. The higher the score obtained from this scale, the higher the perceived cultural distance.

Spousal adjustment: This measure was identical to the Expatriate Adjustment scale (see below), excluding items that concerned work or interaction with host nationals in work contexts (15 items). Past evidence (Black and Stephens, 1989) suggests that 80 percent of expatriate spouses do not work in the host country or work in voluntary positions. The present study confirmed this estimate.

Criterion variables Adjustment: A self-report measure of all three adjustment vari-

ables – environment, interaction and work adjustment – consisted of 25 items responded on a 5-point Likert scale (e.g., How adjusted are you to: The transportation system; The values of the people here). Eleven items were drawn from Black's (1988) study of expatriate adjustment, while 14 additional items were generated for the present study. The new items addressed issues specific to Israel, such as environmental adjustment, interaction with Israelis, and adjustment to work in an Israeli work setting. These items were designed to provide more specific insights to the adjustment process in a specific country setting, while preserving the original meaning of each scale to avoid any adverse effect on possibility of generalization, for example, 'How adjusted are you to supervising Israeli subordinates?'. Better adjustment was indicated by high scores obtained from this measure.

Expatriate's overall satisfaction was measured by seven items generated for this study. Satisfaction from life and work was measured in items such as 'To what extent are you satisfied with your life here in Israel in general?'. The higher the score, the higher the satisfaction.

Questionnaires were administered in English and were not translated. All respondents were parents of children attending the American International School in Israel. The school's only language of communication with all parents is English. In compliance with the school's practices, it was assumed that English language competency was high among all respondents.

Results

Predictor variables are discussed separately from criterion variables, and correlations between the two are discussed at the end of this section. First, we examined the construct validity and reliability of the predictor and criterion variables. We then examined the predictive power of the hypothesized independent variables in explaining adjustment.

This is probably the place to call attention to a limitation of our study. It concerns the sample size and its relation to the number of analyses applied to it. An N of 47 as a sample size is not unusual for expatriation studies, especially when we consider the difficulties in obtaining willing expatriate candidates on the job. The limitation results from our ambitious efforts to do all analyses (correlations and factor analysis) necessary to confirm the predictive model.

Predictor variables

International Orientation Scale (IOS): We first examined whether the IOS may be reduced to its four suggested constructs. The data were subjected to a Principal Components analysis, which yielded eight factors with eigenvalues greater than one, accounting for 75% of the variance. Based on the scree test, four factors were retained for the second factor analysis which explained 51% of the variance. The resulting matrix was rotated using the Varimax method, and factor loadings are presented in Table 1.

The four categories originally comprising the IOS are roughly reproduced in the results. The first factor is the *Foreign experiences* dimension. The second factor is composed of the *Participation in cultural events* item, although some of these appeared also on the fourth factor. The third factor includes most of the *International attitudes* items, and the fourth factor is related to *Comfort with differences*. Items 13 and 17 were not loaded highly on any factor, and item 23 was grouped with the *Participation in cultural events*. These three items were eliminated from subsequent analysis.

We may conclude that the expatriates in Israel responded to the questionnaire in a way that indicates a meaningful interpretation of the constructs. Consequently, four IOS sub-scales were constructed. These scales had acceptable levels of internal consistency, as indicated by the Cronbach alpha coefficients ($\alpha = .68$ for *Participation in cultural*

events, $\alpha = .88$ for *Foreign experience*; $\alpha = .60$ for *Comfort with differences*; and $\alpha = .71$ for *International attitudes*). Table 2 presents the mean and standard deviation of the scales and their inter-correlations.

In spite of the fact that equal weights were used in scale construction, the inter-correlations between them were low. Thus, the four dimensions of International Orientation are not only theoretically but also empirically distinct. Inspection of the score means suggest that the level of International Orientation attitudes of the expatriates in the sample was higher than their attitudes in other domains. This difference was found significant in a series of paired-samples t-tests (all p 's < .05). Thus, although their past *experience* with different domains of cultural diversion, indicated by the three other measures, was not extensive, their *attitudes* towards international exposure were positive.

Cultural distance: The independent variable representing the construct of cultural distance was based on Torbiorn's (1982) questionnaire. It was found to possess acceptable internal consistency (a Cronbach's alpha coefficient of $\alpha = .74$), with mean of 3.91 and SD of 0.58.

Job attitudes: Being the focus of previous research, job attitudes are the factor most widely considered by the multinational companies in selection of expatriates (Ronen, 1989). Three facets were employed in the design of this independent variable. The first two facets pertained to conflict and ambiguity, based on the Rizzo et al. (1970) questionnaire, and the final facet contained three items designed to tap the perceived levels of job autonomy. The latter scale was generated by the researchers. A factor analysis was performed on all items of these attitudinal variables. The initial analysis revealed six Principal Components with eigenvalues greater than one, explaining a total of 75% of the variance. Three factors, suggested by the scree test and accounting for 54% of the variance, were extracted from the second

Table 1 Factor analysis of International Orientation Scale (IOS)

IOS item	Factor 1:	Factor 2:	Factor 3:	Factor 4:
	foreign experiences	participation in cultural events	international attitudes	comfort with differences
11. Reading a foreign language	.96	.01	.08	-.07
10. Speaking a foreign language	.92	-.17	.07	-.03
12. Writing a foreign language	.90	.06	.14	-.06
09. Learning a foreign language	.79	.33	-.07	.00
02. Foreign films	.01	.66	-.24	-.32
05. Ethnic festivals	-.15	.65	-.23	.16
07. Theater, concerts, etc.	.26	.63	.09	.08
06. Art galleries and museums	.22	.62	.33	.40
23. The type of a preferable vacation abroad	-.33	.52	.22	-.15
03. Magazines dealing with world events	-.01	.42	.08	.14
22. Fascination by other cultures	-.07	.13	.86	-.03
21. Overseas assignment as an opportunity	-.05	.09	.70	.02
18. Wishing to be sent overseas	.24	-.21	.68	.18
20. Traveling the world as a high priority	.05	.42	.55	.12
13. Friends career goals and interests	.06	-.04	.35	.23
04. Major networks world news	-.15	.22	-.05	.61
14. Friends ethnic background	-.12	-.07	.17	.61
01. Variety of ethnic restaurants	-.05	.23	-.08	.54
16. Friends first languages	.37	-.21	-.01	.48
15. Friends religious affiliations	-.06	.08	.23	.47
08. Traveling to foreign countries	.23	.36	.19	.44
19. Teaching a foreign language in school	.32	-.06	.36	.41
17. Moving across countries previously	.17	-.05	.31	.34
Eigenvalue	4.44	3.27	2.45	1.68
% explained variance	19	14	11	07

Note: The number before each item refers to the item number in the original questionnaire

factor analysis. The resulting matrix with a Varimax rotation is presented in Table 3.

The three initial constructs are represented in the analysis, with the three factors related to, respectively, Ambiguity, Autonomy, and Conflict. Several items were highly loaded on factors other than those on which they were expected to appear (items 3, 4, 5, and 12). These were excluded from subsequent analysis. Two additional items, 1 and

16, were highly loaded on two factors, and were therefore also excluded from the analysis. The resulting scales had acceptable internal consistency (α s = .81, .86, and .68 for Ambiguity, Autonomy, and Conflict, respectively). Their distribution and inter-correlations appear in Table 2.

Role novelty: This variable, assessing novelty of the present job as compared to the job in the parent organization, was designed

Table 2 Distribution and inter-correlations of predictor variables

Predictor variable	Mean	SD	1	2	3	4	5	6	7	8	9	10
1. Cultural events	3.13	.55	—									
2. Foreign experience	2.58	1.1	.22	—								
3. Comfort with differences	2.96	.70	.17	.23	—							
4. International attitudes	4.37	.67	.19	.08	.28	—						
5. Cultural distance (novelty)	3.91	.58	-.43	-.05	.03	-.18	—					
6. Job ambiguity	1.84	.59	.06	-.13	-.08	.15	-.14	—				
7. Job autonomy	3.80	.86	-.03	-.02	-.01	.04	-.06	-.44*	—			
8. Job conflict	2.69	.78	.04	-.26	.12	.29	.13	.19	-.15	—		
9. Role novelty	2.75	.76	.03	.26	-.07	.18	-.33*	-.33*	.25	-.22	—	
10. Spouse's Interaction Adjustment	3.56	.72	.37*	-.01	.11	.38*	-.43*	.41*	.14	-.06	.03	—
11. Spouse's environmental adjustment	3.54	.80	.06	.00	.22	.37*	-.41*	.08	.27	.05	.05	.49*

* $p < .05$

following Black (1988). It was found to possess good internal consistency ($\alpha = .83$), with mean of 2.75 and SD of .76.

Spousal adjustment: The items comprising this scale, adapted in part from Black (1988) and in part designed by the researchers, were intended to measure two distinct domains: *Environment adjustment* and *Interaction adjustment*. A factor analysis was performed on these data. Five components with eigenvalues greater than one were extracted in the initial analysis, explaining a total of 76% of the variance. As suggested by the scree test, two factors explaining 53% of the variance were retained for the second factor analysis with Varimax method. The rotated matrix is presented in Table 4.

The analysis clearly separated items dealing with people and social environments (Factor 1) from items related to environmen-

tal conditions and material issues (Factor 2). Two items, transportation and healthcare facilities, appeared to be separately evaluated, and they were excluded from subsequent analysis. The single item related to 'shopping' appeared on the *Environmental Adjustment* factor, while in the parallel analysis on the expatriates adjustment scale, this item was related to *Interaction adjustment*. In order to create identical versions for both spouses and expatriates, this item was also eliminated from the analysis. One item (number 10) concerning general adjustment to Israel was loaded on both factors, and therefore was eliminated from the analysis. The resulting *Interaction adjustment* measure had an internal consistency coefficient of $\alpha = .88$ ($M = 3.56$, $SD = .72$), and *Environment adjustment* $\alpha = .74$ ($M = 3$, $SD = .80$). These two measures were positively correlated ($r = .49$, $p < .05$).

Table 3 Factor analysis of job attitudes

Job attitude item	Factor 1: role ambiguity	Factor 2: role autonomy	Factor 3: role conflict
09. I know exactly what is expected of me	.81	-.12	.16
06. I know what my responsibilities are	.78	.09	-.08
13. Explanations are clear	.77	-.03	.26
03. I do things I feel should be done differently	.43	-.20	.13
02. Clear, planned goals and objectives exist for my job	.64	-.12	.11
16. I have opportunities to use my unique abilities	-.54	.53	-.06
01. I feel certain about how much authority I have	.51	-.46	-.16
15. I have freedom to do things in my own way	-.29	.76	.09
17. I am allowed to be creative	-.35	.73	.08
05. I receive an assignment without the manpower to complete it	-.25	-.70	.19
12. I receive assignment without adequate resources and materials to execute it	.00	-.65	.34
04. I know I am properly allocating my time	.23	-.36	.27
11. I do things accepted by one person, but not others	.04	-.13	.74
07. I have to bend a rule/policy	-.09	-.22	.72
10. I receive incompatible requests from two or more people	.14	-.02	.71
14. I work on unnecessary things	-.31	.17	.55
08. I work with two or more groups that operate differently	.09	.22	.53
Eigenvalue	4.68	2.26	1.94
% explained variance	28	13	11

Note: The number before each item refers to the item number in the original questionnaire

Criterion variables

Expatriate adjustment. Black's (1988) questionnaire, with additional items designed for this study, was intended to tap into three dimensions of adjustment. The first two were identical to the spouse's adjustment scales: *Environment adjustment* and *Interaction adjustment*, and the third, assessed *Work adjustment*. These scales were submitted to Principle Components analysis, which yielded six components with eigenvalues greater than one, explaining altogether 73 percent of item variance.

Three factors, explaining 57% of the variance, were retained using the scree test criterion and rotated using the Varimax method in a second factor analysis. The resulting matrix (Table 5) reconstructs the three dimensions.

A few interesting observations are worth noting. The 'health-care facilities' item was not related strongly to any factor, as it was in the spouse's questionnaire. The 'transportation system' item, unrelated in the spouse questionnaire to any factor, now appeared on the *Environmental adjustment* factor. The

Table 4 Factor analysis of spouse's adjustment

Spouse adjustment item	Factor 1: Interaction adjustment	Factor 2: Environmental adjustment
01. Interacting with Israelis in general	.84	.14
02. The values of the people here	.78	.21
09. The entertainment	.76	.16
08. Going out socially with Israeli friends	.75	.12
07. Interacting with people from countries other than your own	.71	.07
11. The customs and traditions	.63	.29
06. The weather	.55	.14
04. Your living conditions	.30	.84
13. The housing conditions	-.05	.77
03. The shopping	.20	.75
05. The food	.39	.69
14. The cost of living	.12	.62
10. Living in this country in general	.55	.60
12. The transportation system	.28	.08
15. The health-care facilities	.40	.26
Eigenvalue	5.95	1.91
% explained variance	40	13

Note: The number before each item refers to the item number in the original questionnaire

'shopping' item, as noted earlier, was related to *Environmental adjustment* in the spouse's questionnaire, while for the expatriates (predominantly men) it was part of *Interaction adjustment*. These three items were excluded from subsequent analysis for both the spouses and the expatriates. Another issue relates to items 18, 19, and 24 in the *Work adjustment* scale, which loaded highly on the *Interaction adjustment* factor. These items, in fact, pertained to social aspects of the work environment. To minimize the overlap between the different domains, however, these items were not used in scale construction; nor was the 'work setting' item which was unrelated to any of the factors. The three scales (*Interaction*, *Environmental*, and *Work adjustment*) were found to possess adequate internal consistency ($\alpha = .87, .65, \text{ and } .94$, respectively), and were

moderately inter-correlated. See Table 6 for scale distributions and inter-correlations. *Expatriate's overall satisfaction* was found to be a reasonably reliable measure ($\alpha = .69$), with $M = 3.74, SD = .54$.

Correlation between predictor and criterion variables

Correlations between the independent and dependent measures are presented in Table 7. Consistent with Hypothesis 1a, significant correlations were found between *participation in cultural events* and *Interaction adjustment*. However, participation in cultural events did not correlate with environmental adjustment and overall satisfaction. Therefore, data partially confirmed Hypothesis 1a. Expatriates who were active in the cultural domain in their home country tend to adjust socially in their

Table 5 Factor analysis of expatriate's adjustment

Job attitude item	Factor 1: Work	Factor 2: Interaction	Factor 3: Environment
20. Performance standards	.89	.07	.15
22. Supervisory responsibilities	.88	.01	.14
23. Work requirements	.88	.09	.08
21. Performance expectations	.87	.05	.16
16. Your work, in general	.83	.05	.23
17. Your specific job responsibilities	.79	.19	-.05
01. Interacting with Israelis in general	.05	.79	.19
02. The values of the people here	-.05	.75	.28
08. Going out socially with Israeli friends	-.09	.88	.07
07. Interacting with people from countries other than your own	.01	.74	.08
09. The entertainment	.14	.67	.08
18. Working with Israeli co-workers	.33	.61	.20
11. The customs and traditions	-.27	.60	.53
19. Supervising Israeli subordinates	.43	.54	.17
24. Informal networks	.33	.47	-.24
06. The weather	.36	.45	.03
03. The shopping	.18	.44	.08
13. The housing conditions	-.12	-.06	.86
04. Your living conditions	.03	.32	.73
10. Living in this country in general	.20	.49	.64
12. The transportations system	.12	.16	.54
14. The cost of living	.21	-.02	.52
05. The food	.26	.22	.44
15. The health-care facilities	.18	.28	.20
25. The work setting	.23	.24	-.03
Eigenvalue	7.70	4.22	2.16
% explained variance	31	17	9

Note. The number before each item refers to the item number in the original questionnaire.

new environment. Contrary to expectations (Hypotheses 1b and 1c), we found no significant relation between criterion variables and two other measures of International Orientation: *Foreign experiences* and *Comfort with differences*. Also unexpectedly, the *International attitudes* are unrelated to the expatriate's adjustment. As predicted (Hypothesis 2), all four job variables, except for role conflict, were related to *Work adjustment*, but not to

other facets of adjustment. Two of the job variables were related to the *Expatriate's overall satisfaction* (satisfaction with one's job was part of this scale). Correlations between Cultural Distance from the home country and Adjustment measures (Hypothesis 3) were in the expected direction (negative), but failed to reach significance. Finally, measures of both spouses' adjustment in the same domains (Social interaction and Environment) are

Table 6 Distribution and intercorrelations of the criterion variables

Criterion variable	Mean	SD	1	2	3
1. Interaction adjustment	3.54	.80	—		
2. Environment adjustment	3.55	.73	.35*	—	
3. Work adjustment	4.08	.77	.14	.24	—
4. Overall satisfaction	3.74	.54	.31*	.33*	.63*

* $p < .05$ **Table 7** Correlations between predictor and criterion variables

	Interaction adjustment	Environmental adjustment	Work adjustment	Expatriate's overall satisfaction
Cultural events	.33*	.21	-.21	.10
Foreign experience	-.19	-.10	-.10	-.20
Comfort with differences	.02	.17	.01	.10
International attitudes	.20	.20	-.01	.05
Cultural distance (novelty)	-.16	-.13	-.07	-.04
Job ambiguity	.11	.02	-.51*	-.53*
Job autonomy	.09	.07	.30*	.42*
Job conflict	-.01	-.03	-.23	-.27
Role novelty	-.06	-.01	.34*	.20
Spouse's interaction adjustment	.60*	.13	.02	.16
Spouse's environmental adjustment	.14	.43*	.41*	.42*

* $p < .05$

positively correlated (Hypothesis 4). Interestingly, the spouse's *Environment adjustment* is also correlated with expatriate *Work adjustment* and *Expatriate's overall satisfaction*.

Discussion and Conclusions

In studying factors affecting the adjustment of foreign expatriates in Israel, we believe we can contribute to the existing literature in three ways. First, our results address the possible application of the predictive model in the context of an intense and highly varied multicultural environment. Second, the study is particular in its timeframe. In the past, most studies sampled returning expatriates,

after completion of their assignment. The present study, however, addressed its sample during the time of the respondents' stay at the host country. Third, the present study allowed for the opportunity to cross-validate several predicting and criteria constructs based on specific existing operationalizations. Here we address mainly concerns of internal consistency and subcategories assumed to be reflected in the various questionnaires. It was assumed that reliability measures and consistent extraction of expected factors reported by a varied sample would reinforce the conclusions and contribute to their generalizability. In addition, the current study is a useful investigation contributing to the body of

knowledge in the area of comparative management, which has been continually claimed to be scarce (Anderson, 2003; McEvoy and Parker, 1995; Scullion and Brewster, 2001; Toh and Denisi, 2003)

The predictive model within the complex multicultural environment of Israel was examined through the relationships between four groups of independent variables and the expatriate's adjustment. These variables were selected based on previous research, which has suggested a multilevel framework for predicting cross cultural adjustment (Arthur and Bennett, 1995; Black et al., 1991; Caliguri, 1992). In general, only partial support was found for the hypotheses proposed in the study, suggesting that the multicultural variance of the environment may act as an inhibiting factor to the predictive model. However, the results do imply that indeed adjustment is a multi-faceted phenomenon and that a multilevel framework can be applied in order to predict expatriate adjustment. Expatriate adjustment, as confirmed by our findings, has three distinct dimensions: *Environment adjustment*, *Interaction adjustment* and *Work adjustment*. Analysis of the questionnaire indicates that the present sample found the three dimensions to be both meaningful and distinct. Support for the internal consistency of two adjustment factors, *Environmental* and *Interaction* adjustment, comes from the analysis of the spouses' adjustment questionnaire, which was limited to the items pertaining to these factors.

Two of the predicting domains were factor analysed in order to establish whether the constructs underlying the questionnaires were indeed meaningful before their predictive power was examined. The first was the IOS, whose four intended factors were generally distinguishable and each scale produced an acceptable internal consistency coefficient. The other predictor domain, job attitudes, was also submitted to a factor analysis. The expected factors emerged in this analysis, each with an acceptable internal

consistency coefficient. This analysis is important theoretically since job factors are usually considered major determinants in selecting expatriates for foreign assignments. Indeed, they contributed to work adjustment and overall satisfaction but had no effect on other adjustment variables.

In general, the relationships between the predictor variables and the criteria variables as defined by the model are not straightforward as was expected: presumed factors were found to be related differently to the three dimensions of adjustment. These relationships are discussed below.

The results of this study provided partial support to the four aspects of the IOS as a predictor of expatriate adjustment to Israel. One dimension of the IOS, *Participation in cultural events*, was found to be related to *Interaction adjustment* in Israel. *Participation in cultural events* is a behavioral assessment, assumed to reflect intellectual curiosity and interest in foreign cultures. The finding indeed indicates that adjustment to living abroad is facilitated when an employee perceives it as an opportunity to experience cultural activities, and when the expatriate has a strong general interest in culture. Such interest is manifested in the activities back home, such as eating at foreign restaurants and going to concerts and museums, which include the works of foreign artist. This finding confirms the suggestion that openness to experience, as evidenced by a behavioral tendency to try different and unfamiliar activities (e.g., eating unusual foods), may serve as a good predictor of future adjustment (Costa and McCrae, 1992; Ones and Viswesvaran, 1997).

Three dimensions of the IOS were not found to be related to adjustment: *Foreign experiences*, *Comfort with differences* and *International attitudes*. The fact that the expatriates' previous foreign experiences were not significantly related to their adjustment may have at least two possible explanations. First, the present study measured only the *quantity* of previous foreign experience and not their

quality. However, in reality there may be a mixture of positive and negative previous international experiences, and the negative experiences may distort the expected relationship. This explanation should, in the future, be vigorously researched. The cultural context of Israel, however, may offer an additional angle to the powers of the predictive model. Possibly, the novelty and uniqueness of the Israeli culture as a whole was so far removed from a more culturally homogenous environment, that previous experience was found less relevant. Israeli culture, comprising a mixture of religions, languages, ethnic backgrounds and political orientations, may have been very different from the environment presented by previous foreign experience and hence from the expatriates' expectations. Even if the expatriates could apply generalizations based on past cross-cultural experiences to the new situation in Israel, this did not facilitate their adjustment. These results suggest that the relationship is somewhat more complex and that more work is needed to determine which factors within a host country inhibit or magnify the impact of previous experiences on current adjustment. Perhaps it is the *nature* of previous international experience that determines its impact, rather than just the total amount of experience. At present, the field is characterized by an over-generalization of the area of foreign experience. Future research should develop more sensitive scales assessing additional parameters included in the theoretical construct, such as the variability of previous countries to which he or she were exposed and the subjective impressions it produced for the expatriate.

Comfort with differences – the third dimension of the IOS – was also not found to be related to any adjustment dimension. This finding, too, may be interpreted by the uniqueness of Israel as a host country and to Israelis as its host nationals. Just as the Israeli culture is unique and may cause some confusion, Israelis are unique, simultaneously

possessing both Western and Eastern characteristics – a combination that may call for unfamiliar ways of handling situations. Such a suggestion calls upon further research to analyse the host country's culture in order to establish the effect of homogeneity and diversity in values, attitudes, norms, ethnic groupings, and other factors effecting expatriate adjustment.

Cultural distance was conceptualized as the perceived difference between the expatriate's home culture and the host country's culture. It was measured subjectively, by referring specific questions to the expatriates concerning the perceived gap between their home culture and the Israeli culture. The assumption was that the larger the reported gap between the two cultures, the harder the expatriate adjustment process. Contrary to the hypothesis, cultural distance and adjustment were not related, although the trend in the negative signs of all the correlations is in the expected direction. Another important point refers to the method used to measure cultural distance. Although one well-established method is objective, using clusters of countries based on attitudinal variables (e.g., Hofstede, 1980; Ronen and Shenkar, 1985), the results of this study suggest that the same 'objective' distance can be perceived differently by different foreign employees – i.e., two expatriates who are both American nationals can perceive the cultural distance between Israel and the US differently. For example, we would have expected Jewish expatriates in Israel to exhibit a more successful adjustment process. Therefore, we feel that in future research cross-cultural comparisons made with objective measures should be accompanied by subjective, individual-level measurements.

Another domain of adjustment is related to the work environment. Job factors tested in this research were found to be connected exclusively to work adjustment. As hypothesized, both role conflict and role ambiguity were indeed negatively related to work adjust-

ment. Role novelty was positively related, implying that a certain level of novelty facilitates adjustment. Perhaps a more sensitive analysis is required here in order to assess more specifically the exact threshold, at which novelty generates a negative effect. Role autonomy was positively related to work adjustment, as expected.

The results of the current study confirm again that the adjustment of the spouse and the expatriate are highly correlated, as are the spouse's adjustment and the expatriate's overall satisfaction. As has been shown previously, adjustment of one spouse is connected to and influenced by the adjustment of the other (Black, 1988; Black and Stephens, 1989; Lanier, 1979; Pinder and Schroeder, 1987). This once more supports the notion that the spouse's lack of adjustment may lead to a higher probability of maladjustment of the expatriate (Black, 1989; Tung, 1981). The results obtained in this research are highly reliable, since the information was gathered from two different questionnaires: one completed by the expatriate and the other by the spouse.

Indices for the sub-categories of adjustment reveal an interesting distinction between *Environmental adjustment* and *Interaction adjustment*, when the results for spouses and expatriates are compared. The interaction adjustment of the spouse is, as expected, highly related to that of the expatriate. Surprisingly, however, the environmental adjustment of the spouse is related not only to the environmental adjustment of the expatriate but also to all other criteria variables, and most notably to the expatriate's work adjustment and overall satisfaction. One challenge becomes evident from this finding: while it is assumed by most of the Western multinational companies that an expatriate's successful adjustment is more likely if he or she is married, the spouse's successful adjustment has been shown to be a major contributor to the success of the expatriate. That is, it has been fairly well established that

failure of the expatriate's mission is highly related to the spouse's maladjustment where expatriates served with their spouses who suffered from maladjustment.

The generalizability of the model needs continuous reconfirmation. For example, although data on expatriate adjustment to Central and Eastern Europe support most of the previous studies on expatriation developed primarily in North America, studies have found that aspects of cultural novelty, previous international experience and role discretion did not appear to be relevant to Irish expatriates in Moscow (Scullion and Brewster, 2001). These researchers stress the notion that 'a detailed understanding of the context of adjustment in each case therefore seems to be important in determining which variables are most likely to cause problems' (2001: 357). Tung (1998) reinforces this claim.

In this context we have assumed that certain adjustment processes in our study were subject to the cultural milieu of Israel, namely, an environment of high heterogeneity in values, ethnic identities, languages, and religions. Considering these potential barriers, it is still evident from our results that the model employed is indeed confirmed, including most of the chosen predicting variables and the triple-faceted expatriate's adjustment processes.

If adjustment is not universal, it will be impossible to find universal adjustment criteria, in which case it might be suggested to match individuals to specific cultures. On the other hand, the present study, which has focused on and been conducted in a single foreign culture of Israel can contribute to the answer by adding specific results concerning the adjustment to one specific host culture. On the one hand, some measures previously employed, including foreign experiences, were not found to be related to adjustment to Israel; on the other hand, other measures have gained additional support by the findings of the present study. One possible

implication of these findings in light of other studies is that perhaps only the difficulty, or extent, of expatriate adjustment varies among host cultures, while the major dimensions of adjustment remain similar.

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Résumé

Prédire l'ajustement des expatriés à l'étranger : Israël comme pays d'accueil (Tali Shimoni, Simcha Ronen and Ilan Roziner)

Cette étude considère que le modèle prédictif de l'ajustement des expatriés à l'étranger, modèle élaboré aux Etats-Unis d'Amérique et fréquemment utilisé, peut s'appliquer dans divers contextes nationaux. Cette hypothèse est testée en utilisant Israël comme pays d'accueil, pays qui propose un environnement très éloigné de la culture nord-américaine, et particulièrement hétérogène au plan des valeurs, des identités ethniques, des langues et des religions. Les expatriés basés en Israël et provenant de 14 pays ont fait l'objet d'une étude au cours de la durée de leur mission dans le pays. Différents construits comportementaux et attitudinaux ont été testés, y compris des variables personnelles, culturelles et liées au travail. En dépit du milieu culturel proposé par Israël, le modèle prédictif a été confirmé dans la plupart des cas. Comme prévu, les résultats indiquent que l'ajustement de l'épouse et l'ajustement de l'expatrié sont fortement corrélés. Néanmoins, l'ajustement d'interaction et l'ajustement environnemental se sont révélés être deux processus distincts, prédits par différentes variables comportementales et attitudinales. L'ajustement au travail constitue un critère séparé qui peut être prédit par des variables d'attitudes au travail. Les implications théoriques et managériales des résultats sont finalement discutées.

摘要

預測僑民適應能力：以色列為東道國

Tali Shimoni, Simcha Ronen and Ilan Roziner

本研究假設，開發於北美的、常用於預測僑民對東道國之適應能力的模型同樣適用於他國。曾以以色列為東道國對該假設做過試驗。以色列是個遠離北美文化的環境，它代表一個在價值、民族性格、語言和宗教方面存在天壤之別的社會。研究包括在其任期內常駐以色列的 14 國僑民。試驗了包括個人、文化和工作變數的行為及態度模式。儘管以色列有那樣的文化氛圍，預測模型仍然在多方面得到印證。如料想的一樣，結果表明，配偶的適應能力和僑民的適應能力息息相關。但是，也發現互相適應及環境適應是截然不同的兩個過程，並被不同的行為和態度特徵所預測。工作適應能力構成一個單獨的衡准，並可以由工作態度的變數所預測。文中討論了這些結果的理論和實用意義。