

**THE ACADEMIC EXPATRIATE IN THE UNITED ARAB EMIRATES: A NEW
LENS THROUGH WHICH TO VIEW EXPATRIATE SOCIOCULTURAL
ADJUSTMENT**

by

Adrienne A. Reynolds

MARY F. WHITMAN, D.B.A., Faculty Mentor and Chair

CYD STRICKLAND, Ph.D., Committee Member

MARK E. MENDENHALL, Ph.D., Committee Member

Raja K. Iyer, Ph.D., Dean, School of Business and Technology

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Abstract

Research conducted on expatriates sent on international assignments by their employing organizations is a robust field of academic study and much knowledge has been generated about this population. However, while useful to the study of expatriate management, this body of literature, through the exclusion of other types of expatriates, lacks full generalizability of its findings. This study enriched a vanguard topic of expatriate management literature by investigating the sociocultural adjustment experiences of a little-researched subpopulation of expatriates; those that self-initiate their own foreign work experiences. This study employed a quantitative web survey to generate data about the sociocultural adjustment experiences of academic expatriates teaching at colleges and universities in the United Arab Emirates. Nine hypotheses were generated and tested regarding the relationship of the antecedent factors of previous overseas work experience and foreign language ability and the in-country factor of culture novelty with cultural adjustment, interaction adjustment, and work adjustment. Hypotheses regarding foreign language ability were not supported. Hypotheses regarding previous overseas work experience were partially supported. Hypotheses regarding culture novelty were fully supported. In addition, exploratory analysis was conducted with additional control variables to explore the influence of factors not currently included in a seminal model of expatriate sociocultural adjustment on the adjustment experiences of the surveyed participants. Evidence was produced to warrant further examination of the factors of age, education level, degree of satisfaction with previous overseas work experience(s), length of employment in current job, employing institution, and location

by city. These results were subsequently compared with data obtained from similar studies of traditional expatriates to further understand similarities and differences between these two subpopulations of expatriates. Finally, the results of this analysis provided original knowledge about the sociocultural adjustment experiences of self-initiating expatriates, contributed to the understanding of the validity of prior research conducted on traditional expatriates and prompted a reexamination of the dominant theoretical model of expatriate sociocultural adjustment upon which much of the expatriate adjustment research is based. Suggestions for further research based on this foundational study were provided.

Dedication

To Daddy, who inspired me to dream of completing my Ph.D. one day; to Momma, whose teachings of optimism, tenaciousness and love of life gave me the courage to fulfill my dream; and to Christian, Madison, and Landon – if you learn nothing else from your Great Aunt, learn this – you can do anything you set your mind to in life, if you have the passion. *Audere est facere.*

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CHAPTER 1. INTRODUCTION

In today's globalized world, organizations are increasingly placing a higher importance on the impact and role of international assignments of employees. Indeed, international assignments are becoming crucial to a multinational organization's challenges in maintaining competitive advantage. This reality has resulted in the overwhelming majority of research on expatriation in for-profit organizations focusing solely on one category of expatriate: the employee sent 'abroad' on a temporary, fixed-term assignment by his or her employing organization. This narrow focus has resulted in a dearth of understanding about the experiences of expatriates who do not fit this description, particularly those who self-initiate their own foreign work experiences. This lack of knowledge results in a large gap in the literature of expatriation that can potentially be problematic for practical expatriate management, as a considerable number of expatriates fall into this latter category (Jokinen, Brewster & Suutari, 2008). While the research conducted on expatriates sent abroad by their employing organizations is compelling, it is not clear to what degree the results of that research are generalizable to the experiences of expatriates that self-initiate their foreign work experiences.

Introduction to the Problem

Of great concern to expatriate management scholars is the identification of factors that will contribute to a successful expatriation experience from both the viewpoint of the organization and the expatriate. Scholars have chosen to focus on a number of different

variables in their research in this arena. Some scholars have focused on high failure rates, which are defined by terminating the international assignment prematurely, that impact organizations in a number of ways (Copeland & Griggs, 1985; McGoldrick, 1997; Shaffer & Harrison, 1998; Tung, 1981; Wederspahn, 1992). Copeland and Griggs (1985), for example, estimated that a failed international assignment could cost an organization between \$55,000 and \$250,000 in direct costs. If Shaffer and Harrison's (1998) calculations of a failure rate between 16 and 50 percent are accurate, then the financial costs alone to an organization are heavy indeed. More recent scholarship has called such alarmist failure rates into question (Harzing, 1995, 2002). However, it is undeniable that even one international assignment failure can have expensive implications for the organization in direct costs.

Of course, an unsuccessful expatriation experience will have a far greater impact than just on the balance sheet of the organization. From an organizational perspective, indirect costs of expatriate failure could include strategic aims and goals not being accomplished, negative impact on job productivity both in terms of the incumbent in the role and the expatriate's co-workers, and could even affect relations with the host-country nationals (Takeuchi, Seokhwa, & Russell, 2002). Hechanova and colleagues (2003) point out that failures on international assignments can also affect the organization's "ability to recruit and retain top quality candidates" (p. 214) not only to the organization but within the firm for future international assignments. From the expatriate's perspective, the costs can be enormous: negative psychological impact not only on the expatriate but also, potentially, on his/her spouse and family, lowered self-esteem as well

as negative consequences for future career goals (Black, Gregersen, Mendenhall & Stroh, 1999).

Two studies (Bhaskar-Shrinivas, Harrison, Shaffer, and Luk, 2005; Shaffer, Harrison, Gregersen, Black, and Ferzandi, 2006) have argued that there are three dimensions upon which a successful expatriation experience should be measured: sociocultural adjustment; withdrawal cognitions, or the “thoughts about and personal plans to quit or return prematurely from an international assignment” (Bhaskar-Shrinivas et al., 2005, p. 261); and job performance. Shaffer and Harrison (1998) argue that collecting data on actual expatriate turnover is difficult to obtain. Therefore, scholars have instead commonly used withdrawal cognitions as a proxy measurement, and this has been a relatively robust area of study (Black & Stephens, 1989; Bolino & Feldman, 2000; Caligiuri, 1996; Caligiuri, 1997; Gregersen & Black, 1990). To date, there have been relatively few studies that have focused on the dimension of job performance (Shaffer et al., 2006). Those that do so tend to focus either on the viewpoint that maladjustment can lead to poor performance on the job (Caligiuri, 1997; Harrison & Shaffer, 2005), or have attempted to identify individual characteristics such as personality traits as predictors of job performance (Shaffer et al., 2006). To date, only one research study has attempted to examine all three dimensions of sociocultural adjustment, withdrawal cognitions, and job performance (Bhaskar-Shrinivas et al., 2005). Most of the international human resource literature on expatriation experience success has examined the issue of sociocultural adjustment, as most scholars hold that this dimension is “*the vital construct underlying the rewards and costs of expatriate experiences to individuals, their families, and their firms*” (Bhaskar-Shrinivas et al., 2005, p. 257, emphasis original).

The present study continued the movement of examining the sociocultural adjustment of expatriates. However, its purpose was to deviate from the well-established territory of the adjustment experiences of traditional expatriates and, instead, focus on establishing a new path of inquiry into the little-researched sociocultural adjustment experiences of those expatriates who self-initiate their employment in foreign countries.

Background of the Study

In the late 1980s, Black, Mendenhall and Oddou (1991) examined the research on both domestic and international adjustment and formulated a seminal theoretical model incorporating both fields. This model became the defining point in research into expatriate adjustment, and, indeed, has been described as “the most influential and often-cited theoretical treatment of expatriate experiences” (Bhaskar-Shrinivas et al., 2005, p. 257).

The Black et al. (1991) model is based upon the assumption that the nature of the international assignment is one in which the employee “leaves a familiar setting and enters an unfamiliar one” (p. 301). Once the employee enters the new, unfamiliar setting, she will experience varying levels of uncertainty about how to live and work effectively in the new environment. The process of adjustment, then, is that in which the employee successfully reduces the levels of uncertainty in the new environment. Black et al. assert that certain key variables found both before entering the new environment and within the environment are those that will most likely influence the employee’s ability to successfully reduce that uncertainty. Black (1988) and Black and Stephens (1989) asserted that adjustment should further be broken down into three distinct components:

general, interaction, and work adjustment. General adjustment refers to non-work experiences such as housing, shopping, traffic, food. Interaction adjustment refers to relationships and communication between the employee and the host nationals, both at work and in daily life, and work adjustment describes the degree of adjustment to the international role and work assignments.

According to the Black et al. (1991) model, the adjustment process begins even before the employee leaves the home country. There are two critical areas in what these authors have termed anticipatory adjustment: individual factors and organizational factors. Individual factors are those that form the employee's anticipatory expectations about the international assignment, and the degree to which these expectations are accurate. Black and colleagues (1991) highlighted training and previous international experience as important individual variables that influence anticipatory adjustment. In addition, organizational factors, defined as selection mechanisms and the criteria upon which such selection of an employee for the international assignment is based, also contribute to the degree of anticipatory adjustment of the employee.

Once the employee makes the transition to the international assignment, a different set of in-country factors come into play. Black et al. (1991) categorize these factors into five areas: individual, job, organization culture, organization socialization, and non-work. Individual factors include self-efficacy, relation skills, and perception skills. Job factors are role clarity, discretion, novelty, and conflict. Organization culture factors include organization culture novelty, social support, and logistical help. Organization socialization factors are socialization tactics and content. And finally, non-work factors include culture novelty and family-spouse adjustment (p. 303). Black and

colleagues set out 20 propositions based on this model regarding the direction of influence between the factors and the three facets of adjustment, and surmised that certain factors would have greater impact on particular aspects of adjustment. For example, these authors proposed that “high organizational culture novelty will be negatively associated with degree of international adjustment, especially work adjustment” (p. 310).

A great deal of scholarly work has been conducted based on the foundation of the Black et al. (1991) model. Bhaskar-Shrinivas et al. (2005) conducted the most comprehensive meta-analysis of the research on expatriate adjustment to date, studying the results of 66 empirical studies based on the Black et al. framework. Much of the focus of this and other empirical studies on the model has been on non-work factors, particularly those focused on cultural adjustment in the international assignment. Indeed, Black et al. (1991) remarked on this trend existing in the research even prior to the creation of their model. Furthermore, there has been little emphasis placed on the role of the organization during the adjustment process. To illustrate, although job factors have been moderately studied, Reynolds (2005) points out that “organizational factors, in both anticipatory and in-country phases, as well as organizational socialization factors, have received scant to no notice in terms of empirical testing” (p. 59). This lack of empirical emphasis on organizational factors is understandable, given the difficulty of obtaining and measuring quantifiable data on such intangibles as organizational culture, as well as a common reticence among organizations to allow access to such information. However, this state of affairs in the research is also troubling, as several scholars have drawn attention to the reality that organizations have historically not provided adequate support

systems during all phases of the international assignment to assist the expatriate in successfully adjusting (Bird, 2001; Black, Morrison & Gregersen, 1999).

In the subsequent empirical research on the Black et al. (1991) model the factors that have been identified by the present study as most salient for expatriate adjustment are culture novelty, family-spouse adjustment, self-efficacy, language training, relation skills, logistical support, and to a lesser extent, previous experience. Other individual and job factors were also tested, but showed weak to no relationships with the adjustment facets. It is important to remember, however, that to date, these factors, and the subsequent statistically significant relationships that have been reported, have only been based on the adjustment experiences of traditional expatriates. Reynolds (2005) posed the question that if different expatriate profiles were tested, would the factors indicated to be the most important for successful adjustment differ? Hence it is important to examine the Black et al. (1991) model of expatriate adjustment through the lens of a different subpopulation of expatriates to understand if its validity can indeed extend beyond traditional expatriates. This study proposed to extend Reynolds's work by examining the Black et al. model through the self-reported adjustment experiences of self-initiating expatriates.

Statement of the Problem

There is a current lack of social scientific research that has been conducted on or about self-initiating expatriates (SIEs). More specifically, to date there has been no published study which has examined the Black et al. (1991) model using SIEs as the sample population. This study addressed this gap in the academic literature on expatriate adjustment by partially replicating earlier studies on the factors influencing adjustment of

expatriates who have been sent abroad by their employing organization (traditional expatriates), while at the same time collecting data that served to illustrate and validate differences in independent variables between these two types of expatriates. As SIE adjustment experiences have only been empirically measured once before in the academic literature (Selmer & Luring, 2009), this quantitative study was exploratory in nature, in that original knowledge around an under-studied subpopulation of expatriates was created through the results obtained herein. This study provided greater understanding of the expatriation experiences of SIEs, thus laying a foundation for further areas of research for future scholars.

Moreover, whereas the extant academic literature supporting the Black et al. (1991) model of expatriate sociocultural adjustment provides rich material for expatriate management decisions within organizations that send selected employees abroad on a fixed-term temporary assignment, this information could end up being misleading for human resource managers and practitioners that work in non-multinational organizations and hire expatriates directly. Given that the world is globalizing at such a rapid rate and that the protean career path has become the norm, this study sought to provide some fresh recommendations for those organizations who, like those in the United Arab Emirates (UAE), depend heavily, if not solely, on a self-initiating expatriate labor force. As the global talent pool becomes more competitive, organizations will need to find better strategies of expatriate management to stay competitive in attracting the best and brightest to their ranks.

Purpose of the Study

The purpose of this study was to explore the influence of selected antecedent and in-country factors from the Black et al. (1991) model on successful cultural, interaction, and work adjustment among SIEs. Once the influence of these factors had been investigated, the results were compared with the existing data regarding the influence of these same factors on traditional expatriate adjustment. This comparison provided insight as to how applicable the Black et al. (1991) model of expatriate sociocultural adjustment is in describing those factors which affect SIE adjustment during their international experiences. Having a greater understanding as to the applicability of the current theoretical and practitioner tools in measuring SIE adjustment experiences not only provides a firm foundation for future empirical research with this group of employees but also aids HR managers and departments of foreign organizations in devising recruitment, on-boarding/orientation, and organizational support programs within their organizations for better SIE retention and performance.

Rationale

This study added to the existing body of knowledge on expatriate adjustment by decreasing the significant lack of knowledge about self-initiating expatriates. Whereas studies conducted about expatriates sent abroad by their employing organizations are rich and plentiful, research to date on those who self-initiate their own expatriate experience is almost nonexistent (Jokinen et al., 2008). Moreover, this study also provided important knowledge as to whether the current research body on expatriate adjustment still shows validity when viewed through the experiences of a different subgroup of expatriates.

Suutari and Brewster (2000) were the first to question this validity in regards to self-initiating expatriates, as their research indicated marked distinctions between SIEs and traditional expatriates, particularly in the variables of motivation, employing organization, types of jobs, individual characteristics, and career paths. Reynolds (2005) went a step further in theorizing that selected factors in the Black et al. (1991) model might shift in importance when the model is used to describe the adjustment experiences of self-initiating expatriates. As discussed in greater detail in the next chapter, Reynolds posited that these factors include previous international experience, motivation, and both anticipatory and in-country organizational factors. Therefore, this study brought a fresh perspective to the research base on expatriate adjustment by testing selected factors on the Black et al. (1991) model on a different subgroup of expatriates. It also provided a starting point for testing Reynolds's theory that selected factors of this model might shift in importance when examining the adjustment experiences of that different subgroup of expatriates.

Research Questions

This study sought to answer the following research questions:

1. How influential are the anticipatory factors of previous overseas work experience and foreign language ability and the in-country factor of culture novelty on successful SIE cultural, interaction, and work adjustment?
2. How does the influence of these selected factors on SIE adjustment compare with their reported influence on successful traditional expatriate cultural, interaction, and work adjustment?
3. What insight does this comparison provide into the applicability of the Black et al. (1991) expatriate adjustment model to explain SIE cultural, interaction, and work adjustment?

To answer these research questions, this study investigated the relationships between selected antecedent and in-country factors as shown on the Black et al. (1991) model (previous overseas work experience, foreign language ability, culture novelty). These factors formed the independent variables in the research hypotheses. The dependent variables were cultural, interaction, and work adjustment on the part of the self-initiating expatriates. It is important to emphasize that this study did not test the Black et al. (1991) in full. It was rather the intent of this study to begin to lay a foundation upon which more comprehensive testing of the model may be conducted in the future.

Significance of the Study

From a scholarly viewpoint this study sought to uncover new information regarding a significantly under-researched subpopulation of expatriates: self-initiating expatriates. Although considered to be a sizable portion of the total expatriate population (Jokinen et al., 2008; Suutari & Brewster, 2000), very little academic research has been performed to date on this population. Through providing this information, this study opens the door for further research not only on self-initiating expatriates but also for a reexamination of previous research into traditional expatriates, which has been assumed to be universally applicable to all types of expatriates.

Furthermore, the results of this study informs human resource managers as to the salience of previously overlooked factors which lead to more successful expatriate adjustment among those who self-initiate their expatriation experience. This information

can help human resource practitioners design better selection, recruitment, and onboarding/orientation processes in the hiring of self-initiating expatriates that can potentially enhance the chances of successful adjustment and therefore workplace performance.

Definition of Terms

The following definitions were used in this study:

Anticipatory adjustment. Anticipatory adjustment describes those antecedent factors which are in place prior to the expatriate departing for the international assignment (Black et al., 1991). These factors will play a large role in influencing both the expatriate's formation of expectations of the international work experience as well as the subsequent adjustment once in country.

Expatriate sociocultural adjustment. Expatriate sociocultural adjustment describes the ability, on the part of the expatriate, to fit in with the host country culture, to include being able to navigate through everyday situations (Selmer & Leung, 2003). There are three facets of expatriate sociocultural adjustment: work, interaction, and cultural (Black et al., 1991).

In-country adjustment. In-country adjustment refers to those factors which come into play once the expatriate has relocated to the foreign country and work environment. These factors will affect not only the mode of adjustment but also the three facets of adjustment (Black et al., 1991).

Self-initiating expatriate (SIE). A self-initiating expatriate is an employee who chooses to seek out his or her own foreign work experience and is hired directly by an organization in the foreign country.

Traditional expatriate. A traditional expatriate is an employee who is sent “abroad” on a temporary, fixed-term assignment by his or her employing organization. Organizations in this category can include multinational corporations, not-for-profit organizations, governmental organizations, and faith-based organizations.

Assumptions and Limitations

This research study was based on the assumption that empirical evidence is needed to help determine the degree to which the research conducted to date on the adjustment experiences of traditional expatriates has validity in describing the sociocultural adjustment of self-initiating expatriates. Until such evidence is produced, there remain many questions as to which variables will commonly influence the adjustment of both subgroups of expatriates, and indeed if perhaps new or unique variables might come into play for one subgroup and not the other. It is also acknowledged, however, that this exploratory study did not provide a definitive verification of this assumption; as with any research study it necessarily was inclusive of several limitations.

First, this research study suffered limitations which were inherent in the methodological design chosen. This study employed a quantitative survey instrument to gather information from the targeted population. This research technique only provided a one-time snapshot of the information gathered, precluding any in-depth, longitudinal understanding of how the relationships among the variables might change over time.

Furthermore, the scope of this study was limited in focus to a select group of self-initiating expatriates: academics who were currently working at universities and colleges

in the United Arab Emirates (UAE). Although targeting this subpopulation of expatriates provided new and meaningful data regarding self-initiating expatriates, and so, therefore, provided insights into the adjustment experiences of this subgroup of expatriates, the narrow choice of the target population precluded any totality of generalizability of findings to the subpopulation of self-initiating expatriates as a whole.

Despite these limitations, this study filled an important gap in the literature on expatriate adjustment as it initiated the process of further study on a group of expatriates that hitherto have been woefully neglected in academic research. The results of this exploratory study provided a foundation upon which further research on the adjustment experiences of self-initiating expatriates may be built.

Nature of the Study

It was beyond the logistical scope of this study to examine all factors that are included in the Black et al. (1991) model or even all the factors that were originally highlighted by Reynolds (2005) as possibly key factors that might shift in importance when examining the differences in expatriate adjustment between traditional expatriates and SIEs. As a consequence, this study focused more deeply on a partial test of the Black et al. (1991) model. Certain factors were chosen as a starting point for this new direction of research into SIE sociocultural adjustment experiences. These factors were chosen as they have been thoroughly used before in studies of traditional expatriates, and, in addition represented characteristics or constructs which were relatively easy to understand from the perspective of the targeted study participants. Through the nature of how these certain factors were tested in this study, as well as the results obtained therein,

a solid foundation of empirical evidence was provided as a basis for future comprehensive studies on the more complex factor constructs, such as motivation and organizational factors. Such comprehensive studies will be necessary to determine with any certainty how well the Black et al. (1991) model in its current form explains SIE sociocultural adjustment.

The initial research question that was asked in this study was

1. How influential are the anticipatory factors of previous overseas work experience and foreign language ability and the in-country factor of culture novelty on successful SIE cultural, interaction, and work adjustment?

The independent variables used in this research study included previous overseas work experience, foreign language ability, and culture novelty of the host country. The dependent variables included cultural adjustment, interaction adjustment and work adjustment.

Control variables for this study included gender, age grouping, nationality, highest degree earned, marital status, if spouse was resident in the UAE and if so, was employed, and time in current employment contract. These control variables served a dual purpose to this study. First, although not included in the Black et al. (1991) model, these variables have been shown to have an effect on cross-cultural adjustment in other studies (Church, 1982; Hechanova et al., 2003; Stahl & Caligiuri, 2005). Second, the use of these variables provided a solid foundation for the subsequent comparison of SIE adjustment to traditional expatriate adjustment. The independent and dependent variables, as listed above, were used to formulate the null and alternative hypotheses upon which the first research question was statistically tested. Once the research study

had been completed and the statistical results had been analyzed, two additional research questions were asked:

2. How does the influence of these selected factors on SIE adjustment compare with their reported influence on successful traditional expatriate cultural, interaction, and work adjustment?
3. What insight does this comparison provide into the applicability of the Black et al. (1991) expatriate adjustment model to explain SIE cultural, interaction, and work adjustment?

Organization of the Remainder of the Study

Four chapters follow this introductory chapter. Chapter 2 provides a substantial literature review as well as the theoretical development for the present study. Chapter 3 discusses the research design and methodology that were used. Chapter 4 discusses the statistical results obtained from analysis of the study data. Chapter 5 discusses the findings derived from the statistical analysis and provides suggestions for further research.

CHAPTER 2. LITERATURE REVIEW

The phenomenon of globalization has drastically changed the world in which we live. Businesses have historically sought to capture new markets or competitive advantages by expanding beyond the borders of the country in which they are headquartered. However, the significant changes in world order and dominance, the restructuring of national boundaries, the rise and fall of significant political and economic regimes, the restructuring of international travel, advances in technology and communication, and greater labor flow mobility in the last 20 years have all contributed to a world of commerce that can no longer survive in an isolationist model of practice. Indeed, a recent report indicates that multinational corporations (MNCs) derive 53% of their revenue from outside of their home countries (Brookfield GRS, 2009, p. 10).

This dynamic new world order of commerce has naturally become a focal point for academic study as well. Within the stream of literature on human resource management (HRM) increasing numbers of studies have been conducted on international topics. Chief among these has been research into the management of the international assignment of employees. Topics studied in this area include expatriate management, expatriate adjustment, measurement of the success of the expatriate assignment, compensation, and repatriation (Reynolds, 2005).

The overwhelming majority of research on expatriation focuses solely on one category of expatriate: the employee sent “abroad” on a temporary, fixed-term assignment by his or her employing organization. This study argued that while the research conducted on this type of expatriate is compelling, it may not universally pertain

to expatriates who do not fit this category. This chapter, therefore, examines the historical treatment of expatriates in the IHRM literature, with a particular focus on the types of expatriates that have been studied. This select population of expatriates (expatriates sent abroad on international assignments by their employing organizations) is then compared with another subgroup of expatriates, those which self-initiate their foreign work experiences, to determine actual similarities and differences. Such a comparison is important as these differences could potentially impact the experience of expatriation in ways that affect both the individual expatriate as well as the employing organization. Next, the chapter discusses the issue of expatriate adjustment, including a substantial review of the most often used model of the adjustment experience, the Black, Mendenhall and Oddou (1991) model, and the subsequent studies upon which it claims its validity. The model is then reevaluated through the lens of a subgroup of expatriates on which it has never been tested. This significant gap in the past studies of this model is the theoretical foundation upon which this current research was based.

Expatriation and the Expatriate

Historical examination of the parameters of what constitutes an expatriate has not produced any one universally accepted definition in the academic literature. Some definitions are quite broad, in that they simply state that expatriates are those employees who work in a country of which they are not a citizen (Daniels & Radebaugh, 1993; Sinangil & Ones, 2001). Other definitions have narrowed the focal point down to a more select group. For example, Aycan and Kanungo (1997) describe expatriates as

employees of business and government organizations who are sent by their organization to a related unit in a country which is different from their own, to accomplish a job or organization-related goal for a pre-designated temporary time period of usually more than six months and less than five years in one term. (p. 250)

Definitions such as the one offered by Aycan and Kanungo (1997) have arisen from the attempt to distinguish between employees and other types of “sojourners,” such as international students, asylum seekers, and religious missionaries. Such a narrow definition of who can be considered an expatriate can thus have spillover effects on the scientific study of the expatriation experience, and indeed, this has occurred in the academic literature, as is discussed to a greater extent below. Limiting the definition of an expatriate to such a distinct group of workers necessarily denies the opportunity for study of other types of expatriates which are, indeed, numerous in today’s globalized world (Suutari & Brewster, 2000).

This narrowly focused definition does make intuitive sense when viewed from a historical perspective. According to Hays (1974), international business volume was not large prior to World War II, and for those multinational firms that did have business requirements for employees abroad, most often the sons of military, diplomatic, or business families were sought to fill expatriate positions, as they were expected to already be knowledgeable about cross-cultural experiences. At the end of World War II, international business increased on a rapid scale, and multinational firms turned to the many returning war veterans who were eager to expatriate and revisit those foreign countries in which they performed their military service. However, a decade later, the pool of veterans willing to expatriate for their organization was dwindling, and firms began to incorporate selection processes (discussed at greater length in the next section)

from amongst their internal employee rosters in order to identify suitable candidates for expatriate posts.

Therefore, while Aycan and Kanungo's (1997) definition of expatriates is accurate from a historical perspective, and does adequately describe one subpopulation of expatriates today, this description of the utilization of labor does not capture the totality of global employment conditions. For example, certain geographical areas, such as Europe, are experiencing shrinking indigenous labor pools (Vanderbroeck, 1992), while emerging economies, such as those countries found in the Gulf Cooperation Council (GCC), i.e., the Arab Gulf States, are very capital-rich, yet do not have sufficient indigenous labor which can sustain and grow those economies as outlined in the strategic plans of the national leaders (Harry, 2007). In the case of these two scenarios, a very different condition of employment opportunities exists, in that labor must be sourced from outside the indigenous labor pool—a situation that necessitates the recruitment of labor from outside the national borders.

Traditional Expatriates as a Basis for the Extant Academic Literature

Studies into facets of the expatriation process and experience from an HRM perspective began in earnest in the early 1970s with Howard's (1973) study of 81 returning expatriates and the issues they faced upon repatriation. In the subsequent 37 years of knowledge, this body of research has grown substantially through exploratory studies, theoretical model building, and numerous empirical studies; it continues to grow today. It is apparent that there is still much that is not known about the topic of expatriation, given the number of recent doctoral dissertations which have explored

various aspects of this phenomenon (Aumann, 2007; Causin, 2007; de Pamich, 2006; Lee, 2005; Moore, 2009; Scharf, 2008; Tran, 2008; Turner, 2006; Tye, 2005; Williams, 2008). HRM scholars have studied traditional expatriates through the perspective of identifying the factors that contribute to either the success or failure of the international assignment and how the same impacts on both the organization and the employee. The international assignment experience tends to be divided into three distinct phases: selection of the employee for the assignment, the expatriation of the employee to the host environment for a defined period of time, and repatriation of the employee back to the home country and organization (Black, Gregersen, Mendenhall, & Stroh, 1999). Success or failure is usually discussed in terms of the expatriation and repatriation phases.

Selection Process

Several researchers have turned their attention to the selection process and mechanisms used by firms to determine which employee to send on an overseas assignment (Caligiuri, 2000; Fish, 1999; Halcrow, 1999; Gregersen et al., 1998; Harvey & Novicevic, 2001; Ones & Viswesvaran, 1999; Spreitzer et al., 1997; Stone, 1991; Tung, 1981). While scholars have attempted to identify those personal characteristics of expatriates that might be the most salient in terms of predicting success on the assignment (Ones & Viswesvaran, 1999; Stone, 1991), apparently this research is not being implemented in practical terms.

Historically, the single most often used criterion by MNCs in selecting employees for an expatriate assignment has been technical competence (Tung, 1981). This trend has been echoed in more recent studies that determined that the selection process is most

heavily influenced by the domestic job performance record of the candidate for the position (Black & Gregersen, 1999; Culpan & Wright, 2002; Harvey & Novicevic, 2002). In addition, Moran, Stahl, and Boyer, Inc. (1987, as cited in Black et al., 1991) reported that only 35% of the MNCs surveyed selected employees from a pool of multiple candidates. Most surprisingly, it seems that the human resource department of the multinational firm has little to no direct involvement in the selection process, but rather functions in an advisory role to the senior level management who enact the selection process (Halcrow, 1999). This scenario is in stark contrast to human resource departments who hire self-initiating expatriates; such departments are necessarily heavily involved, and for some positions, are the sole influence on who is selected for employment. These departments will play a role throughout the entire recruitment and selection life cycle, from posting advertisements or contracting with external recruitment agencies, through interviewing, skill testing, reference checking, offer negotiation, and employee on-boarding.

Measuring the Success of Expatriation

Some scholars have focused on high failure rates, which are defined by terminating the international assignment prematurely, that impact organizations in a number of ways (Copeland & Griggs, 1985; McGoldrick, 1997; Shaffer & Harrison, 1998; Tung, 1981; Wederspahn, 1992). Copeland and Griggs (1985), for example, estimated that a failed international assignment could cost an organization between \$55,000 and \$250,000 in direct costs. If Shaffer and Harrison's (1998) calculations of a failure rate between 16 and 50% are accurate, then the financial costs alone to an

organization are heavy indeed. More recent scholarship has called such alarmist failure rates into question (Harzing, 1995, 2002). However, it is undeniable that even one international assignment failure can have expensive implications for the organization in direct costs.

Of course, an unsuccessful international assignment will have a far greater impact than just on the balance sheet of the organization. From an organizational perspective, indirect costs of assignment failure could include strategic aims and goals not being accomplished, the impact of job productivity both in terms of the incumbent in the role as well as that employee's co-workers, and could even affect relations with host-country nationals (Takeuchi, Seokhwa, & Russell, 2002). Hechanova and colleagues (2003) point out that failures on international assignments can also affect the organization's "ability to recruit and retain top quality candidates" (p. 214) not only to the organization but within the firm for future international assignments. From the employee's perspective, the costs can be enormous: negative psychological impact not only on the employee but also potentially on the spouse and family, lowered self-esteem as well as negative consequences for the future career of the employee (Black, Gregersen, Mendenhall et al., 1999).

More recently, some researchers have built upon these earlier studies and have crafted a more sophisticated and broader view of the components of expatriate success. Two studies (Bhaskar-Shrinivas, Harrison, Shaffer, & Luk, 2005; Shaffer, Harrison, Gregersen, Black, & Ferzandi, 2006) have argued that there are three dimensions upon which a successful expatriation experience should be measured: sociocultural adjustment; withdrawal cognitions, or the "thoughts about and personal plans to quit or return

prematurely from an international assignment” (Bhaskar-Shrinivas et al., 2005, p. 261); and job performance. Shaffer and Harrison (1998) argue that collecting data on actual expatriate turnover is difficult to obtain. Therefore, scholars have instead commonly used withdrawal cognitions as a proxy measurement, and this has been a relatively robust area of study (Black & Stephens, 1989; Bolino & Feldman, 2000; Caligiuri, 1996; Caligiuri, 1997; Gregersen & Black, 1990). To date, there have been relatively few studies that have focused on the dimension of job performance (Shaffer et al., 2006). Those which do so tend to focus either on the viewpoint that maladjustment can lead to poor performance on the job (Caligiuri, 1997; Harrison & Shaffer, 2005), or have attempted to link individual characteristics such as personality traits as predictors of job performance (Shaffer et al., 2006). To date only one research study has attempted to comprehensively study all three dimensions of sociocultural adjustment, withdrawal cognitions, and job performance (Bhaskar-Shrinivas et al., 2005).

Most of the international human resource literature on international assignment success has examined the issue of sociocultural adjustment, as most scholars hold that this dimension is “*the* vital construct underlying the rewards and costs of expatriate experiences to individuals, their families and their firms” (Bhaskar-Shrinivas et al., 2005, p. 257, emphasis original). As a consequence, it is this facet of expatriation which was the chosen focus for the current study.

Expatriate Sociocultural Adjustment

Sociocultural adjustment has been described as the ability to fit in with the host country culture, to include being able to navigate through everyday situations (Selmer &

Leung, 2003). This description can be expanded by Brett's (1980) assertion that one of the primary processes of adjustment is that of reducing uncertainty. Although related, sociocultural adjustment is distinct from psychological adjustment, which describes feelings of well-being and mental comfort in the expatriate (Searle & Ward, 1990). Berry (1999) provides an excellent explanation of this distinction by stating that

Psychological problems often increase soon after contact, followed by a general (but variable) decrease over time; sociocultural adaptation, however, typically has a linear improvement with time. Analyses of the factors affecting adaptation reveal a generally consistent pattern: good psychological adaptation is predicted by personality variables, life change events and social support, while good sociocultural adaptation is predicted by cultural knowledge, degree of contact, and inter-group attitudes. (p. 16)

Early models of cross-cultural adjustment, such as Oberg's (1960) model of culture shock, and Guthrie's (1975) learning model, tended to treat this concept as a unitary phenomenon. Black and Stephens (1989) broke new theoretical ground by arguing that sociocultural adjustment should be viewed as a multidimensional concept. These researchers conceptualized sociocultural adjustment into three discrete facets: work, interaction, and general adjustment. Work adjustment refers to the degree of adjustment to the expatriate's job and work assignments. Interaction adjustment measures the degree of comfort expatriates feel when interacting with the host country nationals. General adjustment refers to the degree of adjustment the expatriate experiences with regard to issues of living in the foreign environment, to include housing, shopping, and food choices.

Black et al. (1991) built on the work by Black (1988) and Black and Stephens (1989) by critically reviewing previous research both in the fields of domestic adjustment

and cross-cultural adjustment. These researchers lamented that work done to date at that time was mostly anecdotal and atheoretical in nature. Therefore Black et al. sought to integrate the domestic and international adjustment literature foci into a more comprehensive, multi-faceted model of expatriate adjustment. This model proposes a typology of factors thought to be influential on the three facets of sociocultural adjustment that were identified by Black and Stephens (1989). These factors are classified into four types: job, organizational, non-work, and individual. Job factors include role clarity, discretion, novelty, and conflict. Organizational factors include organization culture novelty, social support, and logistical help. Non-work factors include culture novelty and family-spouse adjustment, while individual factors are self-efficacy, relation skills, and perception skills. Shaffer, Harrison and Gilley (1999) expanded this model to include two additional individual factors: previous assignments and language fluency. A key premise of this model is that those factors that increase uncertainty will inhibit adjustment, while those that reduce uncertainty will facilitate adjustment (Black et al., 1991).

As discussed earlier, the Black et al. (1991) model is an integration of previous work from both domestic and international adjustment research. The job, organizational and individual factors are based on the domestic adjustment literature. Only the non-work factors stem from the international perspective. Furthermore, the Black et al. model proposes two dimensions of adjustment: pre-departure and in-country.

As previously discussed in Reynolds (2005), many studies have shown moderate to robust support for this model of expatriate sociocultural adjustment (Bhaskar-Shrinivas et al., 2005; Black et al., 1991; Shaffer & Harrison, 1998; Shaffer et al., 1999; Takeuchi,

Yun & Russell, 2002). Successive researchers have proposed differing models of expatriate adjustment (Birdseye & Hill, 1995; Caligiuri, Joshi & Lazarova, 1999; Hechanova, Beehr & Christiansen, 2003; Kraimer, Wayne & Jaworski, 2001; Wang, 2002). However, the models proposed by these authors still display the influence of the Black et al. model, in that adjustment is still delineated into three facets: work, interaction, and general. Additionally, the factors influencing these facets of adjustment have not been replaced in the subsequent models; rather, additional factors were identified. Nevertheless, these additional models have not been empirically tested beyond the initial research conducted by the authors; only the Black et al. model has been further validated by outside research efforts. Indeed, Bhaskar-Shrinivas et al. (2005) describe the Black et al. model as easily “the most influential and often-cited theoretical treatment” (p. 257) of expatriate adjustment, and a quick search of the most popular electronic databases proves this to be the case: for example, at the time of writing, Business Source Complete lists 205 citations of the Black et al. paper. Therefore, the Black et al. model of sociocultural adjustment is the natural choice of focus for examination and it provided the theoretical basis for the current study.

The Black et al. (1991) Model of Expatriate Adjustment

As previously described in Reynolds (2005), the Black et al. (1991) model describes expatriate sociocultural adjustment through three distinct facets: work adjustment, interaction adjustment, and general adjustment. Therefore, this model assumes that different antecedent variables will impact the facets of adjustment in dissimilar ways. Moreover, the antecedent variables which affect these facets of

adjustment can be categorized into two spheres: anticipatory adjustment and in-country adjustment (see Appendix A). The variables found in each sphere of adjustment will be explained further.

Anticipatory Adjustment

Anticipatory adjustment refers to those antecedents that precede the expatriate departing for the international assignment. Black et al. (1991) state that the inclusion of anticipatory adjustment in this model is important, for “if appropriate anticipatory adjustments are made, the actual adjustment in the new international setting will be easier and quicker” (p. 305). Black and colleagues separate these adjustment factors into two categories: individual and organizational.

Individual factors. Individual factors are those which will influence the expatriate’s formation of expectations of the international assignment. Such expectations might be created regarding the job itself, the organization for which the expatriate will work, the host-country nationals, the national culture of the host country, and daily life in the host-country environment.

Black et al. (1991) theorize that the more accurate the expectations of the individual with regards to the international assignment, the easier and quicker the in-country adjustment process will be. In other words, accurate pre-departure preparation on the part of the expatriate should help to reduce uncertainty levels once arriving and settling into the new country. According to Black and colleagues, expatriates form their expectations based on training and previous experience.

Pre-departure cross-cultural training can either be provided by the employing organization or be self-initiated by the expatriate. Such training provides information

needed to reduce the uncertainty that would be experienced in an unfamiliar environment. Training content could include descriptive country/area information, social rituals, religious practices, negotiation patterns, deep-seated cultural values, and language training.

Mendenhall and Oddou (1985) hold that the greater the cultural toughness of the international assignment (or, as described by Church [1982], the greater the cultural distance between the expatriate's home culture and that of the host country), the greater the need for extensive cross-cultural training. For example, a Canadian expatriate relocating to England would, theoretically, require less preparation about the culture of the host country than one moving to Qatar. The accuracy of the expatriate's expectations regarding the international assignment would, theoretically, increase with sufficient training. Moreover, Mendenhall and Oddou (1986) point out that a greater degree of interaction in the host culture with host-country nationals would also require a greater level of rigor of cross-cultural training.

Just as pre-departure training, through providing new knowledge and information about the host country, could increase the accuracy of expectations, logically then, previous international experience, too, could affect the accuracy of expectations of the new assignment. If the expatriate has previously worked in a similar environment to the forthcoming host country, it could be assumed that the levels of uncertainty regarding what is not known would be much less. Additionally, some researchers have theorized that international experiences in general would facilitate greater ease of adjustment. For example, Shaffer et al. (1999) propose that previous international experience will develop valuable relocation know-how that can reduce uncertainty in adjustment to a new

assignment; in other words, expatriates who have gone through a previous international assignment might redirect their attention to what adjustment mechanisms worked for them in the past, and disregard those that did not. Some empirical support has been found for previous international assignments positively influencing expatriate adjustment; surprisingly, however, the support to date is weak and inconclusive (Bhaskar-Shrinivas et al., 2005; see further discussion in the next section).

Organizational factors. The second part of anticipatory adjustment focuses on organizational factors: specifically, the criteria and mechanism used in selection of employees to expatriate. Historically, the single most often used criterion by MNCs in selecting employees for an expatriate assignment has been technical competence (Tung, 1981). In addition, Moran, Stahl, and Boyer, Inc. (1987, as cited in Black et al., 1991) reported that only 35% of the MNCs surveyed selected employees from a pool of multiple candidates. In contrast to this practice, Black et al. propose that expatriates will stand a better chance of adjusting cross-culturally if selection mechanisms go beyond just assessment of technical competence to include multiple candidates and selection criteria.

In-country Adjustment

Once the expatriate has transitioned into the international assignment, a differing set of factors become salient to the adjustment process. Black et al. (1991) group these factors into five areas: individual, job, organization culture, organization socialization, and non-work. These five categories affect both the mode of adjustment as well as the three facets of degree of adjustment, i.e., work, interaction, and general.

Individual factors. Individual factors can further be divided into three categories: self-oriented, others-oriented, and perceptual-oriented. Black et al. (1991)

highlight what they consider to be the most important self-oriented factor: self-efficacy, which is defined as “the ability to believe in oneself and one’s ability to deal effectively with the foreign surroundings, even in the face of great uncertainty” (p. 307). Individuals with high levels of self-efficacy continue to display new learned behaviors longer than those with low levels of self-efficacy, even when the results of such displays are not successful. This ability is essential in that if an expatriate persists in displaying new behaviors, this will, in turn, provoke greater levels of feedback. Such feedback is necessary for expatriates to learn what is expected of them, thus reducing uncertainty about how to handle culturally unfamiliar situations.

Others-oriented factors illustrate the relational skills of the individual. The greater the relational skills, the easier it will be for the expatriate to interact with the host nationals (Mendenhall & Oddou, 1985). Interactions with host nationals would provide additional feedback to the expatriate about more invisible, below-the-surface aspects of the host culture, in addition to how well the expatriate is fitting in. Once more, such feedback would help to reduce the uncertainty of the transition, thus increasing the degree of adjustment.

The final individual factor, perception skills, also allows the expatriate to formulate a greater understanding of the host environment. The more perceptive the expatriate, the more accurately will cultural signals and values be interpreted, thus assisting in a greater level of adjustment. Black et al. (1991) propose that all three individual factors relate to the mode of adjustment, as well as to the three degrees of adjustment.

Job factors. The second category of factors that influence in-country adjustment is composed of factors which focus on the job. Black et al. (1991) have labeled these factors as role clarity, role discretion, role novelty, and role conflict. In contrast to individual factors, which are posited to relate to all three facets of adjustment, Black and colleagues propose that job factors relate only to the facet of work adjustment.

Role clarity and discretion are suggested to be positively associated with expatriate adjustment. If an expatriate is provided with accurate information regarding the responsibilities of the job, so that her expectations are met about the nature of the job to be performed, it is assumed she would subsequently have reduced uncertainty about what is expected. Correspondingly, as flexibility in the work environment (role discretion) increases, the greater is the capacity of the expatriate to shape the job to her expectations, thus also reducing uncertainty.

In contrast, role conflict and novelty are posited to be negatively related to expatriate adjustment. When ambiguity exists between the expectations held regarding job behaviors and duties and what is expected, uncertainty levels will not be reduced, thus inhibiting adjustment of the expatriate. Reynolds (2005) provides an illustrative example of this type of dissonance:

A Western academic, used to the freedom of speech and topic choice in the classroom, might strongly disagree with the required behaviors in a Middle Eastern country, in which certain topics are considered taboo for discussion in the classroom, and [if such discussions were held] could be grounds for immediate dismissal. Indeed, such a situation can lead to high levels of cognitive dissonance; such incongruity can act as a strong inhibitor of successful adjustment. (p. 57)

Moreover, role novelty, which “really involves the difference between the past role and the new one” (Black, 1988, p. 280), would also inhibit the reduction of uncertainty for the expatriate.

Organization factors. In-country adjustment also includes organizational factors within the host country. These factors have been delineated into two categories which address organizational socialization and culture. Lueke and Svyantek (2000) define organizational socialization as “the process by which an individual fits in or becomes adjusted to a new role in an organization and learns the content of information necessary for adjustment” (pp. 384-5). Black et al. (1991) call attention to the idea that socialization can be discussed in terms of both tactics and content. Reynolds (2005) explains that socialization would occur in contrasting forms: either the expatriate would be expected to accept the job role as is, with little to no flexibility in being able to shape that role to individual preferences or behaviors, or conversely, would be not only encouraged but expected to create change. Black et al. posit a relationship between organization socialization and mode of adjustment only.

Organizational culture focuses on three factors: organization culture novelty, social support, and logistical help. As previously discussed for role novelty, the degree of unfamiliarity of the organizational culture will be positively related to the amount of uncertainty of that environment; thus in turn, this unfamiliarity would be negatively related to adjustment. Black et al. (1991) proposed that organizational culture novelty would be related only to work adjustment. Furthermore, the inclusion of social support in the new organization, by both supervisors and colleagues, would also provide valuable information regarding acceptable behaviors in the workplace through which uncertainty

could be reduced. Again, this factor would show a positive relationship to work adjustment.

The third factor in organization culture, logistical help, would have a contrasting impact on adjustment when compared to the two factors described above. Logistical help describes non-work aspects of the international assignment such as housing, shopping, and schools for dependent children. Black et al. (1991) therefore postulate that increased levels of logistical support would reduce uncertainty and facilitate adjustment in those non-work facets of adjustment, i.e., interaction and general adjustment.

Non-work factors. The last category of factors which influence expatriate adjustment relates to the non-work arena. These include culture novelty (i.e., of the host country) and family-spouse adjustment. As previously discussed, as the cultural distance between the cultural norms and values of the expatriate's home country and those of the host country increases, so too will the level of dissonance, thus requiring a greater degree of effort to eradicate this conflict. Therefore, Black et al. (1991) propose that there would be a positive relationship between the amount of cultural distance and the degree of adjustment to be made by the expatriate. They further propose that because "policies and procedure of the U.S. parent company could dilute the impact of the novelty of the host culture" (p. 312), culture novelty will have a greater impact on interaction and general adjustment.

If the expatriate is accompanied by a spouse and children to the host environment, then, of course, the adjustment experiences of those family members will also be influenced by the same non-work factors as the expatriate. Black et al. (1991) propose that family-spouse adjustment will affect all three facets of the expatriate's adjustment, in

that “maladjustment in the family would certainly create a spillover effect onto the expatriate’s ability to integrate into the new environment, as well as potentially affect the expatriate’s focus and performance at work” (Reynolds, 2005, p. 59).

The Black et al. (1991) model of expatriate adjustment has received substantial support in the expatriate management literature (see next section). Many factors in the model, and indeed the relationships between them, as postulated by Black et al., have been empirically validated. Although several newer theoretical frameworks of expatriate adjustment have been created, as in the case of the model proposed by Shaffer et al. (1999), attempts were not made to discredit the Black et al. model; rather, these newer models instead strengthened and expanded the model. It can therefore be assumed that scholars in the expatriate management field hold the Black et al. model as valid when used to describe the adjustment of expatriates who are sent on an international assignment by their home organization. Subsequently, the Black et al. model is a natural choice as the theoretical model upon which this study of expatriate adjustment was grounded. A review of the empirical findings regarding the Black et al. model is discussed next.

Empirical Support for the Black et al. (1991) Model

This study reviewed six empirical articles (see Table 1) to determine the current state of empirical support for the Black et al. (1991) model of expatriate adjustment: four tested the model directly (Black, 1988¹; Caligiuri et al., 1999; Shaffer et al., 1999;

¹ The Black (1988) research was conducted before the construction of the Black et al. (1991) model. However, given that the model was partially based on the results reported in this article, it is logical to include the reported results as an indicator of support.

Takeuchi et al., 2002), and two articles conducted meta-analyses of the expatriate literature (Bhaskar-Shrinivas et al., 2005; Hechanova et al., 2003).

The studies listed above share a similar definition of expatriates: “employees who [are] sent by their companies on a cross cultural assignment” (Hechanova et al., 2003, p. 217). In other words, the data reported in these articles were collected from traditional employees sent on an international assignment by their employing organizations. Two of the four individual studies reviewed here are included in the meta-analysis of 42 articles and unpublished dissertations as performed by Hechanova and colleagues (Black, 1988; Shaffer & Harrison, 1998), while three of the studies are included in the 66 studies and unpublished dissertations used for meta-analysis as conducted by Bhaskar-Shrinivas et al. (2005) (Black, 1988; Shaffer et al., 1999; Takeuchi et al., 2002). Only the study conducted by Caligiuri et al. (1999) was not included in either meta-analysis. It is important, however, to discuss the articles included in the meta-analyses individually as well, given that these authors provide additional insight into some specific causal relationships that were either not reported or for which statistically significant results were not found in the meta-analyses. For example, Bhaskar-Shrinivas et al. (2005) did not test the antecedent factor of cross-cultural training. Although Hechanova et al. (2003) did report some causal relationships between cross-cultural training and general adjustment, Black (1988) reported a negative relationship between this factor and work adjustment; this relationship was not reported in the Hechanova et al. meta-analysis. Furthermore, Takeuchi et al. (2002) reported on the statistically significant influence of language training and previous experience on work adjustment, two variables which will be tested in this current study; these relationships were not reported at all in the

Hechanova et al. study, and only meager support was found for a relationship between previous overseas experience and work adjustment in the Bhaskar-Shrinivas et al. study. The studies selected for review provide a robust picture regarding which variables show correlation with the three facets of expatriate sociocultural adjustment, which do not, and which have, as of yet, been relatively untested (see Table 2 for an aggregated depiction of the statistically significant findings of the reviewed research).

Table 1
Coding of Expatriate Adjustment Articles Reviewed

Authors	Research Method	Sample Characteristics	Code
Caligiuri, Joshi, & Lazarova (1999)	Structured telephone interview	38 American female expatriates in Europe, Australia, and Asia	A
Black (1988)	Survey questionnaire	77 American expatriate managers in Japan (Response rate: 40%)	B
Takeuchi, Yun, & Russell (2002)	Survey questionnaire	243 Japanese expatriates and 173 spouses in the U.S. (Response rates, respectively: 81%, 86.5%)	C
Shaffer et al. (1999)	Survey questionnaire	452 expatriates from 29 different countries working in 45 countries (Response rates, respectively: 41.5%, 26%)	D
Bhaskar-Shrinivas et al. (2005)	Meta-analysis	66 empirical studies, MNC expatriates, total n = 8,474 (individual n's by study not provided)	E
Hechanova et al. (2003)	Meta-analysis	42 empirical studies, MNC expatriates, n range 31-452	F

Anticipatory Adjustment

In terms of the anticipatory adjustment phase, an examination of both the individual and meta-analytical studies listed above showed robust support for causal

relationships between individual factors and all three facets of adjustment. Previous international experience and language training both showed the strongest positive relationship with interaction adjustment (Bhaskar-Shrinivas et al., 2005; Shaffer et al., 1999; Takeuchi et al., 2002) while only weak support was shown for work adjustment (Bhaskar-Shrinivas et al., 2005), and weak to moderately strong support was shown for general adjustment (Bhaskar-Shrinivas et al., 2005; Shaffer et al., 1999). Interestingly, while cross-cultural training showed the expected positive relationship with general adjustment², Black (1988) found a negative relationship between this factor and work adjustment. Black proposed two possible explanations for this finding. First, having greater pre-departure knowledge about the host country would heighten the expatriate's awareness of the "cultural elements in the job responsibilities" (p. 290), thus possibly producing more caution in anticipation of behaving inappropriately. Second, it is possible that the content of pre-departure training focuses more on aspects of general adjustment, while only marginally addressing work adjustment. Surprisingly, none of the studies tested for relationships between organizational selection mechanisms and criteria and the three facets of adjustment.

In-Country Adjustment

Turning toward the in-country adjustment phase, it becomes apparent that some categories of factors have received a great deal of attention in the academic literature, while others have not yet been examined. Only one of the individual studies that were reviewed in this paper (Shaffer et al., 1999) tested for relationships between job factors and the three facets of adjustment. Shaffer and colleagues found that role clarity shows a

² The Bhaskar-Srinivas et al. (2005) meta-analysis did not examine this factor.

positive relationship with work and general adjustment, while role discretion has a positive influence on work adjustment only. Hechanova et al. (2003) found additional relationships for both these factors with interactional adjustment. Bhaskar-Shrinivas et al. (2005) reported significant positive relationships for role clarity and discretion with work adjustment but found no significant relationship for role novelty and work adjustment. Although no individual study reported results regarding the job factor of role conflict, both meta-analyses showed a robust negative relationship between this factor and work adjustment.

Caligiuri and colleagues (1999) found relationships between overall organizational support and cross-cultural adjustment in general. Pre-departure training and relocation assistance were the examples of support given in this study. Beyond these findings, only one other individual study in this review (Shaffer et al., 1999) found causal relationships for any organizational factors; these researchers were able to demonstrate moderate influence of coworker and logistical support on interaction adjustment. Neither meta-analyses (Bhaskar-Shrinivas et al., 2005; Hechanova et al., 2003) provided evidence of relationships between supervisor support and any facet of adjustment; however, some influence was reported for coworker support on work adjustment, as well as for logistical support on interaction and general adjustment. None of the studies reviewed here provided any insight into the effects of organizational socialization on expatriate adjustment or into the effects of organization culture novelty. It was presumed by the researchers that parent company policies and culture would carry over into the work environment in the international assignment and so this area has received little attention in empirical studies (Bhaskar-Shrinivas et al., 2005; Black et al., 1991).

Both the Bhaskar-Shrinivas et al. (2005) and Hechanova et al. (2003) meta-analyses found positive relationships between the individual factors of self-efficacy with work adjustment and interaction adjustment, and relation skills with interaction and general adjustment. Bhaskar-Shrinivas et al. also found positive relationships between relation skills and work adjustment, whereas Hechanova et al. found a positive relationship between self-efficacy and general adjustment, as well as perception skills and interaction adjustment. Only one of the individual studies reviewed here (Takeuchi et al., 2002) found support for relationships between individual factors and adjustment; these authors reported moderate influence of relation skills on interaction and general adjustment.

The effect of non-work factors on adjustment by far were the most examined in the articles included for review in this study. All four of the individual studies reported results for this category, as well as both meta-analyses. Indeed, the reported causal relationships for this section are very strong. Bhaskar-Shrinivas and colleagues (2005) found negative relationships between culture novelty and all three facets of adjustment. Takeuchi et al. (2002) and Shaffer et al. (1999) echo these findings. Both meta-analyses found positive robust support for the effects of family-spouse adjustment in all facets of adjustment, and all but one of the individual studies reported the same evidence (Takeuchi et al. did not address spousal adjustment in their study).

Table 2
Aggregated Empirical Support for the Black et al. (1991) Model

<i>Predictors</i>	Work Adjustment	Interaction Adjustment	General Adjustment
Anticipatory Adjustment			
<i>Individual Factors</i>			
Cross-Cultural Training	-B		B, -F
Language Training	C	E, F	E, F
Previous Experience	E	E	C
<i>Organizational Factors</i>			
Selection Mechanisms Criteria		None reported	
In-Country Adjustment			
<i>Job Factors</i>			
Role Clarity	E, F	F	D
Role Discretion	E, F	F	
Role Conflict	-E, -F		
Role Novelty			-D
<i>Organizational Factors</i>			
Supervisor Support		None reported	
Coworker Support	E, F	D	
Logistical Support	A	E	E
<i>Organizational Socialization</i>			
Tactics Content		None reported	
<i>Non-work Factors</i>			
Culture Novelty	-E	-E	-E
Family-Spouse Adjustment	E, F	E, F	E, F
<i>Individual Factors</i>			
Self-efficacy	E, F	E, F	F
Relation Skills	E	E, F	E, F
Perception Skills		F	

Note. The letters refer to the codes given to the individual studies as listed in Table 1. Codes used for the non meta-analytic studies are only given when these studies showed either contradictory data to what was reported by the meta-analyses or where relationships were not tested by the meta-analyses. A negative sign in front of a letter indicates negative correlation between the variables in question. Indices are all significant at $p < 0.05$ or less.

Summary of Empirical Evidence

Based on the review of the empirical studies which have been performed on the Black et al. (1991) model of adjustment, it was possible to make some cautious assumptions with regards to the importance of various factors on the adjustment experiences of traditional expatriates.

Non-work factors, particularly those focused on cultural adjustment in the international assignment, have received the bulk of attention in empirical studies of expatriate adjustment. Indeed, Black et al. (1991) remarked on this trend existing in the research even prior to the creation of their model. Furthermore, there has been little emphasis placed on the role of the organization during the adjustment process. To illustrate, although job factors have been moderately studied, Reynolds (2005) points out that “organizational factors, in both anticipatory and in-country phases, as well as organizational socialization factors, have received scant to no notice in terms of empirical testing” (p. 59). This lack of empirical emphasis on organizational factors is understandable, given the difficulty of obtaining and measuring quantifiable data on such intangibles as organizational culture, as well as a common reticence among organizations to allow access to such information. However, this state of affairs in the research is also troubling, as several scholars have drawn attention to the reality that organizations have historically not provided adequate support systems during all phases of the international assignment to assist the expatriate in successfully adjusting (Bird, 2001; Black, Morrison & Gregersen, 1999).

In the research reviewed previously in this chapter, the factors which had been identified as most salient for expatriate adjustment were culture novelty, family-spouse

adjustment, self-efficacy, language training, relation skills, logistical support, and to a lesser extent, previous experience. Other individual and job factors were also tested, but showed weak to no relationships with the adjustment facets. However, it is important to remember that to date, these factors, and the subsequent statistically significant relationships which have been reported, have only been based on the adjustment experiences of traditional expatriates. Reynolds (2005) therefore posed the question that if different expatriate profiles were tested, would the factors indicated to be the important for successful adjustment differ? Hence it was important to examine the Black et al. (1991) model of expatriate adjustment through the lens of a different subpopulation of expatriates to understand if its validity can indeed extend beyond traditional expatriates. This study extended Reynolds's work by partially testing the Black et al. model through the self-reported adjustment experiences of self-initiating expatriates.

Self-Initiating Expatriates

In contrast to the very robust collection of literature on traditional expatriates, there is a dearth of published work on the processes and experiences of self-initiating expatriates (SIEs) (Bozionelos, 2009; Jokinen et al., 2008). The first article to focus on SIEs in academia was published only a little over a decade ago (Inkson et al., 1997), and an exhaustive search of the major electronic database repositories of scholarly publications revealed only 15 subsequent articles on the topic, 13 of which are exploratory in nature (Crowley-Henry, 2007; Henry, Hamdi, & Shedid, 2009; Inkson & Myers, 2003; Jokinen et al., 2008; McKenna & Richardson, 2007; Reynolds, 2005; Richardson, 2006; Richardson & Mallon, 2005; Richardson & McKenna, 2000;

Richardson & McKenna, 2002; Richardson & McKenna, 2006; Suutari & Brewster, 2000; Vance, 2005), and only two of which report on the results of an empirical quantitative study of SSEs (Bozionelos, 2009; Selmer & Luring, 2009). A search of dissertation and thesis abstracts in the UMI database revealed no U.S. university-based dissertation written on the topic of SIEs. It is surprising that so little is known, or has been studied, on this subgroup of expatriates, given that considerable numbers of expatriates fall into this category (Bozionelos, 2009; Jokinen et al., 2008). For example, a recent study by the OECD (2009) reveals conservative estimates of over 2 million foreign workers who are SIEs worldwide. Indeed, Jokinen et al. (2008) describe SIEs as “an almost hidden aspect of the international labor market” (p. 979).

Those articles which have been published on SIEs have covered a wide range of topics. Inkson et al. (1997) looked at two contrasting models of international career experience: expatriate assignment (EA) and overseas experience (OE)—an expatriation model which resembles that described in this study for SIEs, although it more widely includes individuals that the SIE model does not; for example, students traveling abroad on a “gap year” who pick up temporary or seasonal work in order to fund their travels. These authors used case study data to explore the similarities and differences in how these two models serve to develop the expatriate’s career, organizational and national competencies. Inkson et al. (1997) found in their study that experience gained through the OE model was less structured and represented “a more important means of knowledge acquisition, individual enrichment, and national human resource development” (p. 364) than that which is provided by EA.

Suutari and Brewster (2000) sought to expand Inkson et al.'s (1997) groundbreaking work of delineating between traditional expatriates and SIEs by being the first to provide empirical data which highlights the differences between the two categories. Areas under investigation included "individual background variables, employer and task variables, motivation, compensation and repatriation issues" (Jokinen et al., 2008, p. 979). Suutari and Brewster used a quantitative, exploratory approach in this study to survey over 400 employees from Finland who were working abroad and found significant differences in the variables as listed above. The results of this study, along with Jokinen et al.'s (2008) further research into the same, are reported in greater detail later in this section.

Richardson and McKenna (2000, 2002) and McKenna and Richardson (2007) have focused on describing both the motivation to expatriate as well as the expatriation experience of academics through the use of metaphor. These authors originally conceived of four metaphors to describe the motivation to expatriate among academics: the expatriate academic as an Explorer (i.e., driven by adventure or the desire to see the world); as a Mercenary (i.e., whereby money is a primary driver for expatriation); as an Architect (i.e., in which career building issues is a primary driver for expatriation); and as a Refugee (i.e., in which escape from something in their home country, including personal or professional issues, or a lack of financial or job stability is the primary focus; Richardson & McKenna, 2000, 2002). Furthermore, metaphors used to describe the expatriation experience were developed: experiencing expatriation as an Explorer (i.e., viewing the overseas assignment as living an adventure); as an Outsider (i.e., whereby during the expatriation experience the academics found it difficult to integrate into the

local communities); as a Student (i.e., experiencing considerable personal change and learning during expatriation); and as a Tightrope Walker (i.e., feeling the expatriation experience involved a high degree of risk, particularly concerning issues of financial and job security). McKenna and Richardson (2007) later refined the metaphorical descriptors used to describe the motivation to expatriate by using the Tightrope Walker metaphor to describe a motivation of seeking risk and challenge, and by introducing two new metaphoric types: Seekers (i.e., those who are seeking something in their personal life, such as a spouse, self-knowledge or awareness and believe it can only be found in a foreign environment); and Missionaries (i.e., individuals who want to 'do good' or help advance or improve other parts of the world). The data that Richardson and McKenna used to build these metaphors, along with a comparison of their results with what the literature on traditional expatriate motivation has shown so far, is discussed in greater detail later in this chapter.

Reynolds (2005) conducted a thorough examination of the Black et al. (1991) model and subsequently reviewed the literature to date on SIEs, in particular focusing on the differentiators between traditional expatriates and SIEs as reported by Suutari and Brewster (2000) as well as Richardson and McKenna's (2002) initial metaphoric descriptions into types of SIE motivation to expatriate. Based on this analysis, Reynolds called for research into investigating the assumed validity of the Black et al. (1991) model to explain successful adjustment among SIEs. She posited that some factors in the Black et al. model might shift in importance in terms of influence on the sociocultural adjustment experiences of SIEs, as well as the possible need to include factors such as motivation which had not previously been included in the model.

Richardson (2006), Richardson and Mallon (2005), and Richardson and McKenna (2006) used qualitative interview data with self-selecting British academic expatriates from Richardson's (2002) Ph.D. thesis to respectively explore the family's role in the decision to expatriate, the role of individual agency and international experience to career development, and expatriate manager allegiance with their home and host organizations. From this shared data, Richardson (2006) was able to discern the central importance that the spouse and children play in decisions to expatriate. These findings are in contrast to the role to which spouses are normally delegated in the traditional expatriate literature, that of the 'trailing spouse'. In addition, Richardson found that not only are spouses and other family members of significant influence on this decision-making process but are also active stakeholders of the decision. For example, Richardson (2006) reported that "[a] dominant theme among parents was that the decision to expatriate was taken in order to enrich the cultural and general life experiences of their children, including linguistic development, broader social networks, and educational opportunities" (p. 480). An important conclusion from this study is the reinforced suggestion that the families of expatriates should be included from the beginnings of the recruitment process, as they obviously play significant roles both in the decision to expatriate as well as in what is to be gained from the expatriation experience.

Richardson and Mallon (2005) used this qualitative data from the academic expatriates to explore "what prompted [the participants] to expatriate and the extent to which their subsequent experience is seen to contribute to career development" (p. 409). Interestingly, the overwhelming reason to expatriate, as given by the participants in this study, was to experience a sense of adventure or to travel beyond the home country

borders. However, for almost all of the participants, this motivation did not drive them to seek out an overseas position; rather “the opportunity to expatriate arose unexpectedly through chance meetings at conference and ‘coming across’ advertisements” (Richardson & Mallon, 2005, p. 412). Although only one participant expressed perceived career opportunities as a driver to expatriate, all participants recounted positive career implications as resultant from the expatriation experience, in that they believed that having international experience in the academic labor market would aid in greater opportunities and promotions both in other expatriate positions as well as back in their home countries. However, one caveat is important to note: of the different geographical locations in which these participants had accepted expatriate academic positions, the most desirable were given as those in North America, Europe, and parts of the Far East and Australasia, whereas the less desirable were in Eastern Europe, Africa and the Middle East.

Richardson and McKenna (2006) used this data from the expatriate academics to build upon Black and Gregersen’s (1992) work in studying the problem of expatriate allegiance, or rather the dilemma of “being torn between the home and host organization” (Richardson & McKenna, 2006, p. 6). As expatriate academics are not sent abroad by a home organization, Richardson and McKenna modified Black and Gregersen’s original matrix to focus on relationships to home and host countries. However, they retained Black and Gregersen’s original labels in the matrix: expatriates who see themselves as “free agents” (i.e., weak relationships to both home and host countries); expatriates who leave their “hearts at home” (i.e., a weak relationship to the host country, a strong relationships to the home country); expatriates who “go native” (i.e., a weak relationship

to the home country, a strong relationship to the host country); and expatriates who see themselves as “dual citizens” (i.e., strong relationships to both the home and host countries). Richardson and McKenna (2006) found that attempting to describe relationship strength to home and host countries was too simplistic, as data emerged indicating a great deal of fluidity in these relationships that is not only dependent upon the dimension through which they are viewed (e.g., desire to visit the home country, official status within the host country, intentions to return to the home country), but that also these relationships are dynamic over time in the expatriation experience. More specifically, Richardson and McKenna’s findings in this study echo those found in Richardson’s (2006) work as to the importance of family relationships and the subsequent effect of those relationships on home and host country allegiance.

Crowley-Henry (2007) used a qualitative study to further understanding around protean career paths. Specifically, this author examined the career-related motivations and experiences of 20 “locally hired international assignees” (p. 59) who were living and working in the South of France and in Germany. Crowley-Henry reported that the individuals interviewed in this study made career choices which were heavily influenced by the protean career path concept—in other words, they took a more holistic approach to their careers, with factors such as “quality of life, work/life balance, and family stability” (p. 59) playing major roles in their choices.

In a similar vein, Vance (2005) qualitatively studied the career paths of 48 American expatriates in East Asia in order to create a model of “pre-international career path strategies and activities for gaining international business experience” (B1). This model contains three phases of these strategies and activities. Phase I is termed

Foundation Building, in which a general building of international awareness and knowledge occurs. These activities generally take place before the conclusion of college study, and may include brief exposure to or limited immersion in a foreign culture. Phase II, Specific Preparation, includes activities designed to prepare the individual to work in a targeted foreign environment. These activities would include specific language training, networking, and developing specific work-related competencies which would be in demand in the foreign country. The final phase, Securing Foreign Employment, contains two tracks: immediate expatriation, in which the individual attempts to secure employment on her own in the foreign country, or the MNC track, in which she joins a multinational organization in the hopes of obtaining a foreign assignment at some point in the future. Vance (2005) found that the immediate expatriation track is particularly advantageous as a career path in that the individual can build “an international track record earlier from which to propel [her] future career more quickly” (p. B5). However, this advantage comes at the cost of the financial security and support which would be provided through the MNC track.

More recently, Jokinen et al. (2008) have explored the perspective of the development of career capital in order to discover further the differences between traditional expatriates and SIEs. Building upon the study by Suutari and Brewster (2000), these authors focused a comparison of career capital development in traditional expatriate assignments and in the experiences of expatriates who self-initiated their foreign work experiences (SEs). Specifically, they focused on three aspects of career capital: *knowing-how*, *knowing-why* and *knowing-whom*. In order to conduct this research, Jokinen et al. targeted a very similar population sample of Finnish expatriates to

the one used by Suutari and Brewster (2000). Jokinen et al. found no significant differences in the development of *knowing-how* or *knowing-why* between the two groups. However, they found a significant difference for *knowing-whom*, in that traditional expatriates typically “already have networks operating within the organization” (p. 991), and therefore, show greater development or holdings of this aspect. Of particular interest to this study were the findings of Jokinen et al. regarding differences between traditional expatriates and SEs as measured by the characteristics first described by Suutari and Brewster (2000). These differences are detailed later in this section.

Henry et al. (2009) qualitatively explored the continuing bonds model of mourning with permanent U.S. expatriates in Egypt. Through interviews with six U.S. citizens living permanently in Egypt, these authors examined how, and to what extent, they continued their personal bond with U.S.-based customs and cultural nuances while adjusting to the cultural environment of Egypt. Henry et al. found mixed results from the study’s participants: of the three participants that were reported, one participant detached from both U.S. and Egyptian cultures, and instead, turned almost solely to religion; another used his perceived loss of bonding with his African-American heritage as a basis for seeking out and working with marginalized groups within Egypt, and the third actively did whatever possible to maintain and strengthen his bonds with U.S. customs and culture, to the point of, wherever possible, leading an exclusively American lifestyle in Egypt. However, it was reported that, regardless of how and to what extent the bonding aspect continued, this phenomenon was influenced by three factors: the participants’ response to loss, their acculturation strategies, and the political, economic and societal context of the foreign country.

Bozionelos (2009) conducted a study on the relationship of job satisfaction and turnover intentions with cross-cultural training, protégé experience, peer support, and the cultural clusters of the home and host countries among 206 SSE nurses employed at a hospital in Saudi Arabia. Unsurprisingly, Bozionelos reported that the more dissimilar the cultural origin of the expatriate from that of Saudi Arabia, the stronger the negative relationship with turnover intentions. In contrast to much of the earlier reported literature regarding the influence of cross-cultural training, this study reported no positive relationship for cross-cultural training with job satisfaction or turnover intentions. Rather, Bozionelos (2009) found that “mentoring and supportive relationships with peers are far more beneficial than cultural training for non-corporate-sponsored expatriates” (p. 127). Bozionelos concluded the article by calling on organizations to consider building strong formal mentoring schemes to aid in expatriate support and adjustment, in that such programs may provide better adjustment results for the expatriate than would a traditional, short cross-cultural training session held during the initial orientation or induction process.

Selmer and Luring (2009) conducted the first published quantitative study of self-selecting academic expatriates, focusing on whether greater cultural distance between the host country and the expatriate’s home country leads to greater adjustment problems. This study is actually the first published article which has provided any empirical evidence as to the validity of the Black et al. (1991) model when used to understand the adjustment experiences of SIEs, although this outcome was clearly not the stated intent of these authors. Selmer and Luring state that the purpose of their study was “to investigate cultural similarity and adjustment of expatriate academics” (p. 430).

Although these authors used a very similar survey instrument to that used in this study, they did not reference the Black et al. model at all in their published article. Instead, they interpreted the use of part of the survey instrument slightly differently from how it was originally used by Black and Stephens (1989). The scale which has been traditionally used to measure culture novelty, an in-country factor on the Black et al. model, was used in Selmer and Luring's study to measure "perceived cultural similarity." The results of this study are interesting. Selmer and Luring found significant relationships between what they term perceived cultural similarity and all three facets of expatriate adjustment for this sample of academic expatriates. However, the results of their analysis did not support their hypothesis that there would be a significant difference in adjustment between those expatriates that perceived the host culture as very similar to their home culture and those that perceived greater cultural distance between the two. The implications of Selmer and Luring's findings to this study are discussed at greater length in chapter 5.

Clearly, then, the knowledge collected so far about SIEs is very limited in terms of depth and no consolidated picture of SIEs has been created to date. It was therefore important to aggregate what has been discovered so far into a comprehensive description of the self-selecting expatriate.

Although Inkson et al. (1997) provided the first comparison of traditional expatriates and SIEs, their definition of SIEs was quite broad, in that the focus was on a common phenomenon of youth in Australia and New Zealand who go on an 'Overseas Experience' after completion of secondary school. Suutari and Brewster (2000) felt it would be more useful to a discussion of similarities and differences between traditional

expatriates and SIEs to narrow the SIE focus to professionals who self-initiate their own work experience. Based on the results of their study of Finnish engineers, Suutari and Brewster crafted the first index of differentiators between traditional expatriates and SIEs. Reynolds (2005) provided a comprehensive discussion of these differentiators; this discussion is updated below.

Differentiators

Initiation of assignment and motivation. Suutari and Brewster (2000) posited that SIEs and traditional expatriates can be differentiated by the following categories: initiation of the assignment, motives, individual background variables, employing organizations, types of jobs, funding, and career paths. Perhaps of all of these, the most defining distinction between SIEs and traditional expatriates is who initiates the foreign assignment (Suutari & Brewster, 2000). For traditional expatriates, the initiator is the employing organization. For the SIE, initiation is self-directed. Furthermore, this differentiation leads to a possible divergence in motivation.

The research into the motivations of traditional expatriates to either seek or accept an international assignment is fairly robust and has produced some main themes (Hippler, 2009). Studied from the perspective of either 'willingness to go' on an international assignment (Fish & Wood, 1997; Miller & Cheng, 1978; Stahl & Cerdin, 2004; Stahl, Miller, & Tung, 2002; Tung, 1998; Welch, Steen & Tahvanainen, 2009) or examining the factors which would alternatively entice or inhibit the decision to go (Brett & Stroh, 1995; Dickmann, Doherty, Mills & Brewster, 2008; Yurkiewicz & Rosen, 1995), the two overwhelmingly top themes of intrinsic motivation which have emerged are opportunities for job and/or career development, and the desire for adventure, travel, and/or a life

change. Indeed, Yan, Zhu, and Hall (2002) declare that “career development is arguably the most important long-term concern of the individual in formulating his or her psychological contract with the MNC in the context of an overseas assignment” (p. 377). Less clear is the importance of a third theme, the extrinsic motivator of financial compensation packages for the expatriate. Some studies (Hippler, 2009; Miller & Cheng, 1978; Yurkiewicz & Rosen, 1995) have found financial incentives to have significant influence over the traditional expatriate’s decision to accept an international assignment. However, other researchers (Dickmann et al. 2008; Fish & Wood, 1997; Stahl & Cerdin, 2004; Stahl et al., 2002; Welch et al., 2009) have reported contradictory results in that financial incentives are either more of a hygienic factor, or rank of little importance in influencing the prospective expatriate. One possible explanation for the lack of agreement around this motivator could stem from the nationality of the expatriate; American expatriates tend to place a greater importance on a financial package as a motivator than do their German, French, Finnish, or Australian counterparts (Fish & Wood, 1997; Stahl & Cerdin, 2004; Welch et al., 2009).

Brett and Stroh (1995) and Yurkiewicz and Rosen (1995) set out to capture those extrinsic factors which could either enhance or impede an employee’s willingness to accept an international assignment. From among the many demographic, intrinsic and other extrinsic factors that were tested, two factors tended to stand out as the most influential. Brett and Stroh (1995) found that the spouse has a large influence over the employee’s willingness to relocate in that if the spouse is not keen on the international assignment, the employee’s willingness decreases in correlation. Another factor which shows significance in influencing the employee’s willingness is that of the location of the

position (Dickmann et al., 2008; Stahl & Cerdin, 2004; Stahl et al. 2002; Yurkiewicz & Rosen, 1995). Although distance from the home country did not seem to rank too highly as a factor (Dickmann et al., 2008), perceptions regarding safety and security in the host country, the language spoken therein, and the difference of the host culture compared to that of the employee's home culture were deemed salient.

The very limited research into the motivation of SIEs to work in a foreign location shows some convergence with what is known to date regarding the motivation of traditional expatriates. Both types of expatriates could be motivated by a desire to learn about another culture, adventure, or by seeing an international assignment as a career-building strategy. Richardson and McKenna (2002), in their study of academic expatriates, developed a taxonomy of metaphors used to describe motivation to work in a foreign country, as well as for experiences of expatriation. This taxonomy was further refined a few years later (McKenna & Richardson, 2007), although the refinements were based on the same data set as the original taxonomy. Within this model, two of the metaphors describing motivation fit both SIEs and traditional expatriates well: the Explorer, or one who wants to explore the world, and the Architect, an expatriate who views the international assignment or experience as career-building material. Richardson (2002) found that the majority of the academic expatriates whom she interviewed listed Explorer-type motivations as the number one reason for deciding to seek employment outside of their home country. Only one of the respondents in her study listed career development as the primary reason; however, a recent study conducted by the *Chronicle of Higher Education* (2009) which examined the interests of U.S. academics in working abroad reported that career development was ranked second in importance by their survey

population. In support of Richardson's data, reasons aligned with the Explorer metaphor ranked first, third, and fifth in importance.

A third metaphor, the Mercenary, describes those SIEs who are heavily influenced by the financial package on offer. According to Richardson and McKenna (2002), the Mercenary identifies money "as a primary driver to expatriation" (p. 71). These authors further recall a traditional view of expatriates, in locations such as the Middle East, as being strictly there for the money; they describe, for example, academics who were motivated by high financial gains to be willing to put up with discomforts they would not ordinarily experience, such as extreme limitations on lifestyle choices in Saudi Arabia. According to Richardson's (2002) thesis, only two out of the 20 academics interviewed described financial incentive as a dominant motivator. However, apparently once the expatriate was in the foreign location and job role, the rewards package became significantly more important, in that the expatriate became used to a higher salary and/or standard of living than he or she had before, and was loath to give that up. The *Chronicle of Higher Education* (2009) reported that out of the 21 appealing attributes of an international position for U.S. academics, taking advantage of better salary and benefits ranked ninth. It would seem, then, that financial compensation as a motivator for SIEs is as complex a factor as it is for traditional expatriates.

Although three of the metaphoric types of motivation as created by McKenna and Richardson (2007) have also been identified in terms of substance in the traditional expatriate literature on motivation, a further three metaphors were created regarding SIEs that have not been discussed at all for traditional expatriates. These motivational metaphors are Refugees, Seekers, and Missionaries. The Refugee expatriate is one who

is escaping his or her home country or personal circumstances and life therein, often “in search of a better personal and/or professional life” (p. 71). For example, Suutari and Brewster (2000) found that 23% of the SIEs surveyed in their sample of expatriate Finnish engineers sought foreign jobs due to the poor employment situation in their home country. The Seeker is one who “may be seeking something for their personal life, e.g. a [spouse]; or those who are seeking self-knowledge, self-awareness and believe it can be facilitated in a different environment” (McKenna & Richardson, 2007, p. 311). The Missionary describes that SIE who wishes to effect positive change or development, spread skills or knowledge, or aid advancement in foreign parts of the world. Although there are no data as of yet beyond Richardson’s (2002) work as to how often the metaphor of Seeker could be applied to SIEs, the *Chronicle of Higher Education* (2009) did find that providing a service to students outside of the U.S. ranked fairly high among the U.S. academics who were surveyed as an appealing attribute of an international position.

Akin to Brett and Stroh’s (1995) findings of the important role the spouse and family play in influencing a traditional expatriate’s willingness to work internationally, Richardson (2006) also highlighted the importance of family reasons as a motivation to expatriate, albeit from a different perspective. Whereas Brett and Stroh describe the spouse as playing a critical role in influencing the level of willingness on the part of the traditional expatriate, for SIEs it was found that an important motivator was being able to expose the family to a different culture and travel opportunities. This finding is also substantiated by the *Chronicle of Higher Education* (2009) report, in which the U.S.

academics surveyed ranked this attribute of an international position to be highly influential, with a ranking of fourth out of 21 total attributes.

The exploratory work done to date on SIE motivation tends to indicate that although some similarities in motivation to work internationally are common to both SIEs and traditional expatriates, there are quite a few further motivators that so far appear to be absent from the decision-making process, or influences of the same, for traditional expatriates. Regrettably, this is still a very under-researched area for both traditional expatriates as well as SIEs. Despite the numerous articles reviewed in this section around the motivators of traditional expatriates, Hippler (2009) laments that despite the excellent exploratory research done on the subject, “when it comes to the motives expatriate have for seeking or accepting an international assignment, a well validated and rigorous research instrument appears not to be available yet” (p. 1382). At this point even less is known about SIE motivation, despite its apparent importance. So far only the three published studies described herein (Richardson, 2002; Suutari & Brewster, 2000; *Chronicle of Higher Education*, 2009) have provided any actual data regarding SIE motivations to seek employment outside of their home country.

Individual characteristics. SIEs and traditional expatriates also differ with regards to individual characteristics. The main variables which show divergence are age, marital status, gender, previous international experience, and spouse-related variables. Suutari and Brewster (2000) found that, on average, SIEs are slightly younger than traditional expatriates; however, the disbursement among age groups is relatively similar. A noticeable difference between these two groups is the number of females. In Suutari and Brewster’s survey, only four percent of traditional expatriates were female; such a

low percentage is echoed through the expatriate management literature (see Caligiuri et al., 1999, for a review). However, Jokinen et al. (2008) found a much higher percentage of females that self-initiated their expatriate experiences, almost 30 percent.

Although little difference has been found between SIEs and traditional expatriates with zero to one previous international experience, multiple experiences were much more common among SIEs than traditional expatriates in both Suutari and Brewster's (2000) and Jokinen et al.'s (2008) studies. Indeed, both of these studies report that more than double the number of SIEs had two or more international experiences. In addition, Suutari and Brewster discovered that there are considerably more single SIEs than traditional expatriates (19% versus 10%). Finally, although the percentage of spouses accompanying both groups of expatriates was approximately the same in Suutari and Brewster's study, the number of SIE spouses who were employed in the host country was almost double that of the traditional expatriate spouses. This disparity could indicate a joint decision by the SIE and the spouse to relocate outside of the home country to look for employment, rather than the phenomenon of the 'trailing spouse' as is so often discussed in the literature about traditional expatriates.

Employing organizations. The organizations which employ SIEs and traditional expatriates also differ in several ways. First, Suutari and Brewster (2000) found that while traditional expatriates are most often employed by an MNC based in their home country, SIEs are more likely to be directly hired by a foreign organization. This finding is also substantiated in the demographic data as reported by Jokinen et al. (2008): their study shows that while over 75% of traditional expatriates studied were employed by a Finnish organization or subsidiary of one, over 80% of SIEs surveyed were employed by

either a foreign or international (i.e., non-Finnish) organization. Furthermore, by classifying employer organizations into levels of internationalization, Suutari and Brewster found that “[traditional] expatriates are more likely than [SIEs] to operate in ‘very international’ companies” (p. 425). In other words, SIEs are more likely hired by organizations with much less of a global focus and/or reach; often, they are hired because their talents and skills cannot be supplied by the local workforce in the foreign country. Jokinen et al.’s study echoes this finding. Concerning job types, traditional expatriates were more likely employed at the managerial level (a finding substantiated in Hechanova et al., 2003), whereas SIEs more often described to Suutari and Brewster their role as ‘expert’, and were more commonly found at a lower hierarchical level. Although more SIEs are found in managerial levels in Jokinen et al.’s study, still the majority of them self-reported in the expert/technical category.

Although Suutari and Brewster (2000) did not find any significant differences in salaries between SIEs and traditional expatriates, they did find differences in the “premiums, allowances, and bonuses attached to the compensation package” (p. 428). For example, most traditional expatriates have some form of assignment insurance, while only about 10% of SIEs are covered. Moreover, funding for the international move most often comes from the organization for traditional expatriates; in contrast, SIEs often pay their own transfer expenses.

Career paths. Finally, SIEs and traditional expatriates differ on their career paths. While traditional expatriates take an international assignment for the purposes of building their organizational careers, SIEs could be more accurately described as following a boundary-less career path (Inkson et al., 1997). For example, traditional

expatriates expect company support, both for career planning (in terms of the advantages international experience will bring inside the organization), and for logistical repatriation assistance at the end of the assignment, although several studies (Lazarova & Caliguiri, 2001; Stevens, Oddou, Furuya, Bird, & Mendenhall, 2006; Stroh, Gregersen, & Black, 1998) report that too often the employing organization's perception of appropriate support does not mirror the expectations of the traditional expatriate. SIEs, on the other hand, are left largely to their own devices in terms of career planning, in that their employer in the host country is unlikely to provide any career development assistance or training outside its organizational bounds. In addition, once SIEs finish their employment contract in the foreign country, they are more likely to be in the uncertain situation of planning the logistics of their own repatriation.

In sum, there are marked distinctions between SIEs and traditional expatriates, particularly in the variables of motivation, employing organization, types of jobs, individual characteristics, and career paths. It is these very distinctions that have led some scholars to call into question the relevance of the current body of expatriate literature to the SIE experience (Jokinen et al. 2008). While this statement might be a bold one, it is as of yet impossible to determine the actual validity of studies conducted on and about traditional expatriates on those who self-initiate their work experiences, given the lack of empirical studies on SIEs. Therefore, a step in the direction of determining the strength of this validity, or lack thereof, is to examine previous work on traditional expatriates, but through the new perspective of the SIE experience. This exploratory study led on this new path by extending the work of Reynolds (2005) in examining the highly-lauded and oft-used Black et al. (1991) model of expatriate

sociocultural adjustment in terms of its applicability to the adjustment experiences of the self-initiating expatriate.

Theoretical Development of the Current Study

The analysis conducted earlier in this chapter on the selected empirical studies which have tested the Black et al. (1991) model highlights certain factors which stand out in terms of salience to traditional expatriate adjustment. These include language and cross-cultural training during anticipatory adjustment, the effect of job factors on work adjustment, and non-work and individual factors on interaction and general adjustment when in-country. It is reasonable to assume, however, that as there are some significant differences between traditional expatriates and SIEs, these stand-out factors may not show the same amount of salience or importance with regards to SIE adjustment.

This assumption is supported by Reynolds's (2005) discussion of which factors might shift in importance in describing the adjustment experiences of SIEs. For example, SIEs on average tend to have more international experience than traditional expatriates. Whereas the data is contradictory in terms of how important the factor of previous international experience is in influencing the three facets of traditional expatriate adjustment (Bhaskar-Shrinivas et al., 2005), this factor might be of more influence for SIEs, in that if an SIE has successfully adjusted during a previous international work experience, then intuitively the SIE might therefore continue to self-initiate further overseas work experiences. Such a supposition would be supported by an investigation into not only how many previous international work experiences an SIE has had but also by exploring the degree of satisfaction that the SIE felt in regard to those experiences.

In addition, given the very different motivations for many SIEs (i.e., the Seekers and Refugees), it is possible that an individual factor not included in the Black et al. (1991) model, that of motivation, would also be of influence on the adjustment experience of the SIE. Reynolds (2005) postulates that “if the [SIE] faces bleak employment opportunities in the home country, or feels that it is very difficult, dangerous, or undesirable to return to the home country, then perhaps extra effort will be extended towards successful adjustment” (p. 64). In other words, the strong motivation to expatriate for the SIE might outweigh any maladjustment to issues either on the job or in non-work areas.

It is also reasonable to expect that organizational factors, both in the realms of anticipatory and in-country adjustment, might impact the degree of adjustment for the SIE differently as compared to that for the traditional expatriate. For example, it has been discussed earlier in this chapter that MNCs oftentimes select prospective expatriates for assignment based on technical competence only, and multiple candidates are often not identified (Black et al., 1991; Tung, 1981). However, when SIEs interview for international positions, the hiring organization not only would select candidates from a broad pool of applicants, but also would make hiring determinations based on a wide range of criteria, not simply on technical competence alone. To illustrate, Reynolds (2005) reports that universities in the UAE

regularly [receive] four to five times as many applicants for faculty positions which are advertised. Therefore, the human resources department, in conjunction with the academic department, will conduct a pre-screening process based on numerous academic and experience qualifications, then will short-list applicants for a lengthy panel interview. Credentials and references are also thoroughly examined before the offer of employment is made. Through such a process, it can be assumed that the

organization, in effect, weeds out many potential [SIEs] that might have difficulty adjusting. (p. 63)

Once the SIE has arrived in-country, the organization would continue to be an important influence on the adjustment process. Whereas Black et al. (1991) have pointed out that for the traditional expatriate, organizational culture issues of the MNC subsidiary would in general reflect the culture of the firm's headquarters in the home country, the SIE might in contrast be faced with a much greater difference in organizational environment and climate than what she is used to back home. Bhaskar-Shrinivas et al. (2005) describe how an organization's culture also reflects the culture of the nation in which that organization is based. Therefore, if an SIE is hired by an organization which is less-internationally focused, and so therefore reflects on a much greater scale the cultural milieu of the host country, adjustment to the organizational culture could be just as great a factor as that of the national culture.

In addition, it can be surmised that job factors and non-work factors would play an important role in SIE adjustment; however, Reynolds (2005) cautions that "such effect could very well be tempered through an explanation of a further metaphor" (p. 63). Richardson and McKenna (2002) went on to originally describe additional expatriate metaphors beyond those that focus on the motivation to expatriate by providing metaphors that describe the experience of expatriation once the SIE is in the foreign country. One of these, applicable only to SIEs, is the Tightrope Walker. The Tightrope Walker describes the stress experienced by the SIE based on the perception that job security is rather nonexistent; in other words, if the SIE were to lose her job, the impact

would not only be in financial terms but could also result in a loss of residential rights in the foreign country. As explained further by Richardson and McKenna,

Some interviewees contrasted [their situation] with the perceived security of [MNC] expatriate managers whom they felt were in a much safer position because they were backed by their home organization. It was felt that if managers did anything wrong they would be repatriated and slotted into a position in the home country or elsewhere. By comparison, many [SIEs] perceived their own positions as much more precarious. (p. 74)

Therefore, organizational socialization could take on a much greater role in SIE adjustment. For example, if an organization provided clear guidelines and published policies regarding termination procedures and rationales, perhaps the SIE would feel less stress and uncertainty that one's job, and therefore in-country residency, could be lost without warning. This factor could potentially take on even greater importance if the antecedent factor of motivation is shown to have significant influence on the adjustment of the SIE. If the SIE is highly driven by either the Mercenary or Refugee metaphor of motivation, then it stands to reason that not having a clear perception of the job security of the international position could cause a great deal of stress and uncertainty, thus reducing chances of successful adjustment.

In sum, it appears that some shifting of importance among the factors on the Black et al. (1991) model might occur when this model is viewed through the adjustment experiences of a different subset of expatriates from which it has been previously tested. Whereas the most important factors evidenced so far affecting traditional expatriate sociocultural adjustment are language, cross-cultural training, job factors, non-work and individual factors, this study posited that additionally previous international experience, motivation, and both antecedent and in-country organizational factors would also assume

roles of great importance in the sociocultural adjustment experiences of SIEs. It is important to note that this study did not hypothesize that the factors which are shown to be most important in traditional expatriate adjustment would have no impact on SIE adjustment. Rather, it was built on Reynolds's (2005) theory that while the Black et al. (1991) model of expatriate sociocultural adjustment is a strong one as currently written, it will need to exhibit more fluidity in terms of which factors might display greater importance or influence over expatriate adjustment, and might also require the addition of unique factors which would only come into play with certain types of expatriates. The intent of this study was to provide empirical evidence upon which Reynolds's theory could begin to be tested for a wider range of expatriates.

Research Questions

A study which tests factors in the Black et al. (1991) model through initial examination of SIE adjustment experiences and then subsequent comparison of the resultant data with what is known about traditional expatriate adjustment experiences would logically result in four outcomes: (a) factor influence on SIE adjustment would closely correlate to factor influence on traditional expatriate adjustment, (b) there would be partial correlation of factor influence on SIE adjustment to traditional expatriate adjustment, (c) results would indicate weak to no correlation of factor influence on SIE adjustment to traditional expatriate adjustment, and (d) the factors on the model would not in totality explain SIE adjustment, leading to a supposition of the necessity of including additional factors in the model which are currently not represented or thought to be influential for traditional expatriate adjustment.

It was beyond the logistical scope of this study to examine all factors which are included in the Black et al. (1991) model, or even all the factors which were originally highlighted by Reynolds (2005) as possibly key factors which might shift in importance when examining the differences in expatriate adjustment between traditional expatriates and SIEs. As a consequence, this study focused more deeply on a partial test of the Black et al. (1991) model. Therefore, certain factors were chosen as a starting point for this new direction of research into SIE sociocultural adjustment experiences. These factors were chosen as they had been thoroughly used before in studies of traditional expatriates, and in addition represented characteristics or constructs which were relatively easy to understand from the perspective of the targeted study participants. Through the nature of how these certain factors were tested in this study, as well as the results obtained therein, a solid foundation of empirical evidence was provided as a basis for future comprehensive studies on the more complex factor constructs, such as motivation and organizational factors. Such comprehensive studies will be necessary to determine with any certainty how well the Black et al. (1991) model in its current form explains SIE sociocultural adjustment.

In order to begin the investigation into understanding the usefulness of the Black et al. (1991) model in explaining SIE sociocultural adjustment, this study used the following research questions:

1. How influential are the anticipatory factors of previous overseas work experience and foreign language ability and the in-country factor of culture novelty on successful SIE cultural, interaction, and work adjustment?
2. How does the influence of these selected factors on SIE adjustment compare with their reported influence on successful traditional expatriate cultural, interaction, and work adjustment?

3. What insight does this comparison provide into the applicability of the Black et al. (1991) expatriate adjustment model to explain SIE cultural, interaction, and work adjustment?

It has been discussed that previous overseas work experience may be an intuitively important influence on SIE adjustment in either different or unique ways than on traditional expatriate adjustment. Therefore, in order to address the first research question, this study examined the influence of previous overseas work experience to see if this factor indeed impacted SIE adjustment experiences. To gain a deeper insight as to how this factor influences SIE adjustment it was examined both in terms of quantity and quality.

In addition, the factor of foreign language ability, which had been shown to be important in traditional expatriate adjustment, was posited to have influence on SIE adjustment as well and was also examined. The influence of this factor, however, may have stemmed from different reasons than have been discussed regarding traditional expatriate adjustment. Hofstede (2001) has stated that “[l]anguage is not a neutral vehicle” (p. 21). In other words, when a foreign language is learned or acquired to a certain level of fluency, then not only are the discrete elements, such as vocabulary and grammar, acquired, but so too is some of the cultural milieu from whence that language is used. Brown, Collins, and Duguid (1989) compared foreign language learning to learning and using a tool. These researchers commented that “tools and the way they are used reflect the particular accumulated insights of communities . . . [therefore] it is not possible to use a tool appropriately without understanding the community or culture in which it is used” (p. 33). Therefore, learning a foreign language to a certain level of

fluency will necessarily include learning about the cultural difference and underlying values which help shape that culture. This learning could perhaps in turn influence sociocultural adjustment in that even if a foreign language is not necessarily used, the prior experience of learning to operationalize in a different cultural milieu could provide antecedent adjustment strategies to the SIE which would help to reduce the uncertainty of the new international environment.

As the non-work factor of culture novelty has been shown to have strong influence on traditional expatriate adjustment, it was also included. It has been theorized that culture novelty would also impact the SIE in different ways from the traditional expatriate, in that the employing organization culture of the SIE is likely to be impacted to a greater degree by the host country culture than that of the organization in which the traditional expatriate works. If this is indeed the case, then the factor of culture novelty could have a greater effect on the adjustment experiences of the SIE, as not only would it impact non-work and interaction adjustment, but it could influence the work adjustment experiences as well.

The selection and testing of the factors of previous overseas work experience, foreign language ability, and culture novelty provided the necessary data that was used to answer the first research question. Moreover, using these factors, which have been previously tested regarding traditional expatriate adjustment, provided a basis upon which the comparative nature of the second research question was examined. By extension, then, comparing the impact of the same factors on both traditional expatriate adjustment and SIE adjustment provided some clarity to the substance of the third research question.

Because this study was exploratory in nature, it was perhaps unhelpful to discretely assign factor influence to a particular facet of SIE adjustment (e.g., previous overseas experience solely influencing work adjustment), regardless of what evidence has been produced in previous studies on traditional expatriates. In this light, the factors discussed above, which were used as independent variables in this study, were all hypothesized to have influence on all three facets of adjustment: cultural, interaction, and work. The facets of adjustment were all considered to be the dependent variables. Although this approach could have been considered a bit unwieldy, and still did not provide conclusive information as to the totality of the SIE adjustment experience, this design strategy illustrated a clearer direction for future research into this topic.

Study Context: The United Arab Emirates

No human experience exists in a vacuum, and this statement is particularly true when examining human experience in a cross-cultural setting. A foreign culture is experienced through the lens of one's own cultural framework (Hofstede, 2001), which in turn helps to illustrate why cultural distance can come into play with regards to sociocultural adjustment (Mendenhall & Oddou, 1985). It is therefore important to highlight the cultural context of this present study, which was conducted with self-selecting academic expatriates in the United Arab Emirates.

A Brief Look at the UAE

The United Arab Emirates (UAE) is the youngest political state in the Middle East, having formed as a federation in 1971 out of seven individual sheikhdoms (Abu Dhabi, Dubai, Sharjah, Ajman, Ras Al Khaimah, Umm Al Quwain, Fujairah). Whereas

before federation, the UAE was mainly characterized by discrete urban trading posts along the Persian Gulf and nomadic villages inland (Davidson, 2008), unprecedented economic growth and urban development has characterized most of the subsequent existence of the country, largely due to substantial oil revenues during the 1970s, 1980s, and the early part of the first decade of the 21st century (Davidson, 2008; Kapiszewski, 2001). Today, the UAE is mostly known to the Western World as either Dubai, that Middle Eastern city which has focused great effort on building its brand as a world-class tourist destination, and so, has been compared to being a cross between Las Vegas and Singapore (Vora, 2008), or to a lesser extent, Abu Dhabi, the capital city and government seat, which is attempting to build its reputation as the leading center of culture in the Middle East through such deals as hosting permanent branches of the Louvre and Guggenheim museums (Vora, 2008).

The UAE has never had a large enough, nor collectively well-educated enough indigenous population to sustain on its own the rapid development of the country (Kapiszewski, 2001). From its beginnings the UAE has relied on foreign labor to build and grow the nation, and the number of foreign workers in the UAE has grown steadily to the present day. The latest reports regarding population provide a breakdown between UAE nationals, called Emiratis, and expatriates; they report this breakdown as being unique in its imbalance. The most recent report shows the UAE population to be 6 million strong; however, only 16.5% of this population is Emirati (Rasheed, 2009). Expatriates, who total almost 83% of the population, can be broken down into the following subgroups: South Asian (India/Pakistan): 50%; Other Asian (i.e., Filipino, Chinese, Korean, Iranian, Afghanistani): 16.5%; Western (North American, U.K.,

European, South African, Australia/New Zealand): 8.3%; with the remaining being Other Arab (Egyptian, Lebanese, Syrian, and other Gulf nationals) (Rasheed, 2009). As a consequence of this unusual population makeup, the sociocultural environment of the UAE is not straightforward.

Arabic is the official language of the UAE; however, English is widely acknowledged as the true *lingua franca* of commerce, and as such, the Emirati government mandates that all public K-12 education provides for both Arabic and English instruction (UAE Yearbook, 2009). In addition, almost all federal universities and colleges use an English-based curriculum, with exceptions for programs such as Islamic Law (Rupp, 2009). Any Western tourist on a holiday in the UAE will have no difficulties communicating only in English at the main tourist sites and luxury hotels. However, further complications do arise for Western residents.

The bulk of the middle and merchant classes in the UAE are from India and Pakistan, with many families having been in residence for generations since before the UAE was federated into a single nation in the early 1970s (Vora, 2008). This sizeable slice of the population manages and works in the more mainstream service industries such as supermarkets, various government agencies, laundry services, medical and health fields, and retail establishments (Harry, 2007). Depending on the nature of the service, the employees found in these organizations might be conversant enough to conduct transactions in English or Arabic, but oftentimes it is the case that the workers mainly only communicate in Hindi or Urdu (Vora, 2008). Indeed, it has been an oft-repeated lament among Western expatriates in the UAE that it is better to learn Hindi than Arabic to conduct day-to-day living needs.

In terms of organizational culture, most government agencies and offices are still organized and operate under very bureaucratic, rigidly hierarchical models that were earlier imported from Egypt and India (Davidson, 2008). This organizational model has subsequently been replicated, and become firmly entrenched, in almost all private and public Emirati organizations, reflecting this same trend throughout the Arab world (Ali, 1995; Dedoussis, 2004). As expatriates in the UAE must hold a residence visa, which is in turn sponsored by their employing organization to work in the UAE, almost every transaction beyond day-to-day living requires many bureaucratic processes to navigate successfully.

For example, in order for an expatriate to have a UAE driver's license, he or she must first request permission from the sponsoring employer and obtain a letter from the organization, with appropriate signatures and seal, which states no objection to the expatriate obtaining a driver's license. The expatriate must then get the driver's license from his or her home country officially translated into Arabic (with the translation being duly stamped for authenticity), obtain the results of an eye test from an authorized testing center, then take all of these papers to the appropriate government traffic and licensing authority, where these papers and subsequent application will need to be reviewed, signed, and have a seal stamped in three different offices before actually obtaining the driver's license (Abu Dhabi: Live, Work, Explore, 2009; Abu Dhabi Police Vehicles and Drivers Licensing Department, 2009). In essence, then, while on the surface living in the UAE may seem quite similar to living in a developed-country context, below that surface the expatriate resident must contend with imported cultural values and structures during daily life interactions, with indigenous norms and rules which stem from Islamic Law, all

of which ensure that a ‘normal’, replicable day experiencing ‘Emirati culture’ is actually a rare occurrence.

Higher Education in the UAE

During the beginnings of the UAE as a nation, those relatively few Emiratis who were able to obtain a college education had to go abroad to India, Europe, or North America to do so (Rupp, 2009; Vora, 2008). This trend began to change with the opening of the first public federal university, the UAE University, in 1977 in the town of Al-Ain. Since that time, the UAE has funded three further federal institutions of higher education, and two of the Emirates, Abu Dhabi and Sharjah, have also provided funding for semi-government institutions to open and operate. Until only very recently, these federal universities and colleges have only been open to Emirati students, particularly at the undergraduate level (Vora, 2008). As such, the children of the majority expatriate population have historically had to go abroad, or back to home countries, in order to attend university. However, due to the great market need for local private universities (Shaw, 1997), many have, in the past 15 years, begun operating on Emirati soil, either as a branch campus of an institution located elsewhere, or as independent institutions in their own right (Rupp, 2009). Examples of these include the American University of Sharjah, the University of Wollongong Dubai, Heriot-Watt University, the University of Manchester, Paris-Sorbonne University–Abu Dhabi, and the American University of Dubai. Currently there are over 77,000 university and college students studying at the more than 60 public and private universities in the UAE (UAE Yearbook, 2009; UNESCO Institute for Statistics, 2009).

Due to the overwhelming demand for higher education within the UAE from both Emirati citizens and expatriates, and the simultaneous lack of qualified academics in the UAE, the vast majority of academics hired at these institutions are sourced from countries outside of the UAE. To illustrate, Spender and Bardsley (2009) report that “in 2007, [for the federal universities,] all of Zayed University’s 265 academics, nearly all the 1,092 academic staff at the Higher Colleges of Technology and 570 out of 747 academics at UAE University were expatriates”³ (para. 10). This large requirement for so many expatriate academics translates into unique and sometimes heavy burdens on the human resource departments of the universities. Not only must these universities consider each other as competition for attracting and hiring suitable expatriate talent, but indeed they must compete with colleges and universities on a global scale. As universities in the UAE have historically not had a tenure system for their expatriate academics (Spender & Bardsley, 2009), human resource departments have had to look to other incentives to entice high-quality academics to consider moving to the UAE to live and work. Generally, these incentives have been financial in nature.

The UAE does not impose any income tax on its residents, and most expatriates living there do not have to pay taxes on their income to their home countries. In addition, all federal universities, and many private ones, provide added financial benefits beyond a tax-free salary to their expatriate employees. These benefits include provided housing or a cash housing allowance, financial assistance for paying for private education for the employee’s children, annual round-trip tickets (or cash in lieu) for the employee and his

³ Statistics regarding how many academics at private universities are expatriates are not publicly available. However, it is common knowledge among the higher education sector in the UAE that almost all Emirati academics are employed by the UAE University in Al-Ain; therefore, it is a reasonable statement that almost all academics in the private university sector are also expatriates.

family to go back to their home country every year, paid medical insurance, expatriation and repatriation allowances, a furniture allowance, and an end-of-service gratuity, usually equivalent to one month's salary for every year worked. In addition, holiday schedules are generous, usually providing for a two week break between academic semesters and around nine weeks vacation during the summer (Higher Colleges of Technology Employment FAQ, 2009)⁴.

Clearly, universities in the UAE commit to a large financial investment in each of their academic employees, and the financial implications of failure to adjust on the part of the SIE are heavy for the university. Several of the financial benefits listed above are provided to expatriates on a conditional basis, in that if the expatriate terminates their contract early, then they will be required to pay back the benefits on a pro-rata basis. Benefits of this nature include the expatriation and repatriation benefits and the furniture allowance—amounts that can total to over \$10,000 USD⁵. This has contributed to the unfortunate occurrence of the unadjusted expatriate academic who, in the local vernacular, “does a runner”, in that he permanently leaves his job and residence in the UAE without warning or notification to the university, oftentimes during the mid-year semester break, in order to avoid the financial penalties of breaking his contract before its completion. This scenario, formally referred to as abscondment, while not a regular

⁴ Although only the Higher Colleges of Technology have listed these benefits publicly on their website, this author can vouch through professional experience as both a faculty member and an HR Manager at three other federal universities that these are standard benefits provided to expatriate employees by all federal universities in the UAE.

⁵ Having no legal compulsion to do so, universities in the UAE do not, as a practice, make public the quantum of their salary and benefit structures. However, this author can attest to this figure as accurate, based on intimate working knowledge of salary and benefit policy and structures for all public universities in the UAE during her HR Management tenure.

occurrence, is not a rare one, either⁶, and the resultant effects echo those discussed in the traditional expatriate failure literature in terms of direct and indirect costs to the organization. As the maladjustment of SIEs can trigger costs to both the organization and the expatriate on the same scale, if not greater, than on the part of the traditional expatriate, it is therefore clear that the lack of study into SIE adjustment must be addressed in order to understand to the same extent what scholarly work has informed us about traditional expatriate adjustment.

⁶ As Harry (2007) rightly points out, hard data on more unflattering scenarios such as this are rarely available in the UAE. However, support for this statement can be found in that some federal universities and colleges have felt the need to write HR policies that specifically deal with absconded employees and the subsequent penalties (HCT–Absconded Employees Policy, 2007).

CHAPTER 3. METHODOLOGY

Philosophy and Justification

There is a current dearth of scientific research that has been conducted on or about self-initiating expatriates (SIEs). More specifically, to date there has been no published study which has examined the Black et al. (1991) model using SIEs as the targeted population under study. This present study addressed a gap in the academic literature on expatriate adjustment by partially replicating earlier studies on the factors influencing adjustment of those expatriates who have been sent abroad by their employing organization (traditional expatriates), while at the same time collecting data that served to illustrate and validate differences between traditional expatriates and SIEs. As SIE adjustment experiences have only been empirically measured once before in the academic literature (Selmer & Luring, 2009), this quantitative study was exploratory in nature in that original knowledge around an under-studied subpopulation of expatriates was created through the results obtained herein. Therefore, this study provided greater understanding around expatriation—more specifically on the expatriation experiences of SIEs—thus laying a foundation for further areas of research for future scholars.

A study which tests factors in the Black et al. (1991) model through initial examination of SIE adjustment experiences and then subsequent comparison of the resultant data with what is known about traditional expatriate adjustment experiences would logically result in four outcomes: (a) factor influence on SIE adjustment would closely correlate to factor influence on traditional expatriate adjustment, (b) there would be partial correlation of factor influence on SIE adjustment to traditional expatriate

adjustment, (c) results would indicate weak to no correlation of factor influence on SIE adjustment to traditional expatriate adjustment, and (d) the factors on the model would not in totality explain SIE adjustment, leading to a supposition of the necessity of including additional factors in the model which are currently not represented or thought to be influential for traditional expatriate adjustment.

It was beyond the logistical scope of this study to examine all factors which are included in the Black et al. (1991) model, or even all the factors which were originally highlighted by Reynolds (2005) as possibly key factors which might shift in importance when examining the differences in expatriate adjustment between traditional expatriates and SIEs. As a consequence, this study focused more deeply on a partial test of the Black et al. (1991) model. Therefore, certain factors were chosen as a starting point for this new direction of research into SIE sociocultural adjustment experiences. These factors were chosen as they had been thoroughly used before in studies of traditional expatriates, and in addition represented characteristics or constructs which were relatively easy to understand from the perspective of the targeted study participants. Through the nature of how these certain factors were tested in this study, as well as the results obtained therein, a solid foundation of empirical evidence was provided as a basis for future comprehensive studies on the more complex factor constructs, such as motivation and organizational factors. Such comprehensive studies will be necessary to determine with any certainty how well the Black et al. (1991) model in its current form explains SIE sociocultural adjustment.

The purpose of this study was to explore the influence of selected antecedent and in-country factors from the Black et al. (1991) model on successful cultural, interaction,

and work adjustment among SIEs. Once the influence of these factors had been investigated, the results were compared with the existing data regarding the influence of these same factors on traditional expatriate adjustment. This comparison provided insight as to how applicable the Black et al. (1991) model of expatriate sociocultural adjustment is in describing those factors which affect SIE adjustment during their international experiences. Having a greater understanding as to the applicability of the current theoretical and practitioner tools in measuring SIE adjustment experiences not only provides a firm foundation for future empirical research with this group of employees but also aids HR managers and departments of foreign organizations in devising recruitment, on-boarding/orientation, and organizational support programs within their organizations for better SIE retention and performance.

Theoretical Framework

The initial research question that was asked in this study is:

1. How influential are the anticipatory factors of previous overseas work experience and foreign language ability and the in-country factor of culture novelty on successful SIE cultural, interaction, and work adjustment?

A visual depiction of the constructs which were under investigation and their relationships is provided in Figure 1.

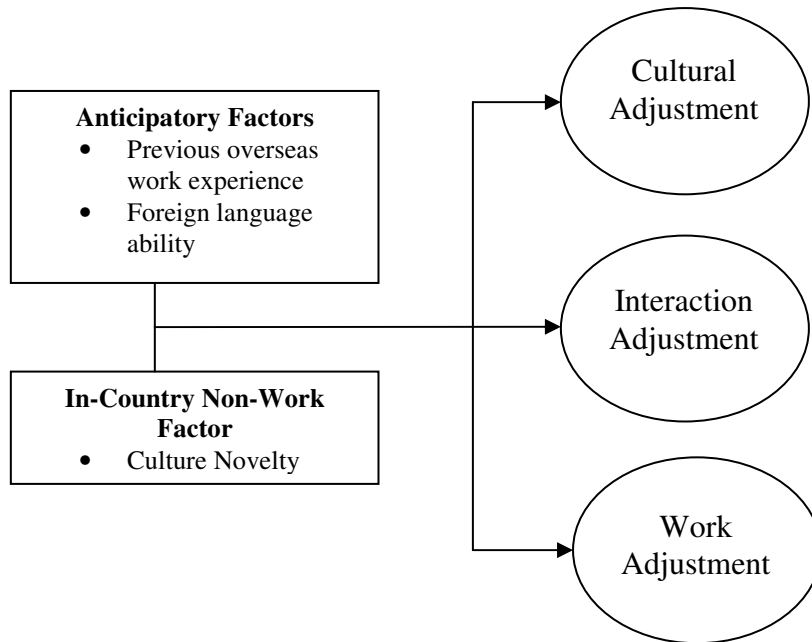


Figure 1. Conceptual framework.

Variables

The independent variables used in this research study included previous overseas work experience, foreign language ability, and culture novelty of the host country. The dependent variables included cultural adjustment, interaction adjustment and work adjustment.

Control variables for this study included gender, age grouping, highest degree earned, marital status, whether the spouse was resident in the UAE, and if so, was the spouse employed, nationality, and time in current employment contract. These control variables served a dual purpose to this study. First, although not included in the Black et al. (1991) model, these variables have been shown to have an effect on cross-cultural adjustment in other studies (Church, 1982; Hechanova et al., 2003; Stahl & Caligiuri, 2005). Second, the use of these variables provided a solid foundation for the subsequent

comparison of SIE adjustment to traditional expatriate adjustment. A summary of all variables is found in Table 3.

Table 3
Summary of Variables Used in This Study

Name	Type	Source
Previous overseas work experience	Independent	Author created
Foreign language ability	Independent	Author created
Culture novelty	Independent	Black & Stephens, 1989
Cultural adjustment	Dependent	Black & Stephens, 1989
Interaction adjustment	Dependent	Black & Stephens, 1989
Work adjustment	Dependent	Black & Stephens, 1989
Gender	Control	Demographic Information
Age grouping	Control	Demographic Information
Highest Degree Earned	Control	Demographic Information
Marital Status	Control	Demographic Information
Resident Spouse in UAE	Control	Demographic Information
Employment of Resident Spouse	Control	Demographic Information
Nationality	Control	Demographic Information
Time in current employment contract	Control	Demographic Information

The independent and dependent variables, as listed above, were used to formulate the null and alternative hypotheses upon which the first research question was statistically tested. Once the research study had been completed and the statistical results had been analyzed, a further two research questions were asked:

2. How does the influence of these selected factors on SIE adjustment compare with their reported influence on successful traditional expatriate cultural, interaction, and work adjustment?
3. What insight does this comparison provide into the applicability of the Black et al. (1991) expatriate adjustment model to explain SIE cultural, interaction, and work adjustment?

Hypotheses

The relationships as depicted in the conceptual framework above, therefore, formed the basis for this study's nine research hypotheses. The null hypotheses were as follows:

- H01a. Foreign language ability will show no relationship with SIE cultural adjustment.
- H01b. Foreign language ability will show no relationship with SIE interaction adjustment.
- H01c. Foreign language ability will show no relationship with SIE work adjustment.
- H02a. Previous overseas work experience will show no relationship with SIE cultural adjustment.
- H02b. Previous overseas work experience will show no relationship with SIE interaction adjustment.
- H02c. Previous overseas work experience will show no relationship with SIE work adjustment.
- H03a. Culture novelty will show no relationship with SIE cultural adjustment.
- H03b. Culture novelty will show no relationship with SIE interaction adjustment.
- H03c. Culture novelty will show no relationship with SIE work adjustment.

The alternative hypotheses which were tested in this research study are as follows:

- H1a. Foreign language ability will have a positive relationship with SIE cultural adjustment.
- H1b. Foreign language ability will have a positive relationship with SIE interaction adjustment.
- H1c. Foreign language ability will have a positive relationship with SIE work adjustment.
- H2a. Previous overseas work experience will have a positive relationship with SIE cultural adjustment.

- H2b. Previous overseas work experience will have a positive relationship with SIE interaction adjustment.
- H2c. Previous overseas work experience will have a positive relationship with SIE work adjustment.
- H3a. Culture novelty will have a negative relationship with SIE cultural adjustment.
- H3b. Culture novelty will have a negative relationship with SIE interaction adjustment.
- H3c. Culture novelty will have a negative relationship with SIE work adjustment.

The alternative hypotheses were considered to be statistically significant at p values of 0.05 or less.

Research Design Strategy

This research study, in part, replicated earlier empirical work testing the Black et al. (1991) model of expatriate adjustment. As discussed in the previous chapter, earlier tests of this model have used a non-experimental, co-relational, and predictive research design. For that reason, this quantitative project also followed the same design, with the key difference being the use of a previously untested subpopulation of expatriates—self-initiating academic expatriates currently teaching at colleges and universities in the UAE.

In order to access the targeted population, this researcher contacted the heads of ethics committees of 10 higher education institutions in the UAE through email requesting permission to access their respective institution's academic employees. The email explained the purpose and structure of this research study, and provided copies of the informed consent letter to be used at the beginning of the online survey, the draft

survey instrument, as well as a draft Capella University IRB application. Ethics committees were assured of the relevance of this study to the practical working efforts and goals for their respective institutions, and were told that upon conclusion of the research effort, they would be provided with an executive summary of the results as well as a presentation of information and resources that could aid in their university's practice of HRM in dealing with this targeted employee population. The ethics committees were requested to provide confirmation of permission granted to access their academic employees through a letter from their respective organizations, on organizational letterheads.

Measures

As this study was semi-replicating earlier empirical tests of the Black et al. (1991) model of expatriate adjustment, previously constructed measurement scales used in testing this model were also administered in the present study. These individual instruments were combined into one final survey instrument (see Appendix B for the final survey instrument). Each individual instrument is discussed below.

Anticipatory Factors Affecting Expatriate Adjustment

This research study tested two anticipatory factors which were hypothesized to have significant influence on the adjustment experiences of SIEs. These factors were previous overseas work experience and foreign language ability. The factor of previous overseas work experience was measured through two items on the survey, and the factor of foreign language ability was measured through one item. Previous overseas work experience was explored through the two dimensions of quantity and quality. Quantity

was operationalized by the number of previous jobs the respondent has held overseas. Quality was operationalized by asking the respondent to rate their degree of satisfaction on a 5-point Likert scale with their previous overseas work experience(s).

Although it is not altogether necessary for expatriates to have foreign language ability to live and work successfully in the UAE, this factor was hypothesized to have predictive influence in that, as discussed previously, the act of learning a foreign language to a certain level of fluency necessarily involves also acquiring certain cognitive shifting in order to function not only in terms of discrete communication but also to do so correctly in the cultural context of how that communication is conducted. In other words, having that previous experience of cognitive shift in explicitly learning about how to operate in a foreign culture could be influential in subsequent international experiences.

In order to adequately capture this full cognitive experience on the part of the SIE, foreign language ability was determined by asking respondents to indicate whether they possess a *conversational* level of fluency or higher in none, one, two, or three or more foreign languages. A conversational level of fluency was defined as the ability to have relatively complex conversations about a range of topics (particularly those which hold personal interest), to guess the meaning of unknown words through context, and to communicate effectively with native speakers (Harrison, 2009). Respondents were provided with this definition on the survey instrument.

In-Country Factors Affecting Expatriate Adjustment

This study tested one of the in-country factors on the Black et al. (1991) model which were hypothesized to have significant influence on the adjustment experiences of SIEs. This factor was culture novelty (of the host country).

Black (1988) and Black and Stephens (1989), in their construction of measurements of expatriate adjustment, initially turned to Torbiorn's (1982) work around culture novelty. Although independent scales measuring expatriate adjustment were created, these authors continued to use Torbiorn's scale for measuring culture novelty. Black and Stephens reported an acceptable reliability level for this scale, with an alpha = .64. This scale has subsequently been used in further studies about expatriate adjustment and has shown reliability measures ranging from .78 to .88 (Black & Gregersen, 1991; Shaffer, Harrison & Gilley, 1999; Takeuchi, Yun & Russell, 2002; Van Vianen, De Pater, Kristof-Brown & Johnson, 2004). As this 8-item scale has been shown as adequate in measuring culture novelty, it was also used in the present study.

Expatriate Adjustment

Based on previous work by Black (1988), Black and Stephens (1989) created a 13-item scale which measures expatriate cultural (described as general in the original study), interaction, and work adjustment. Of the 13 items, seven items focus on the cultural environment, which in the original study produced a reliability score of .82. Three items measure interaction adjustment, with a reported intrascale reliability of .89. The three remaining items measure work adjustment, and Black and Stephens reported reliability of .91 for this component of the scale. As this scale has been the most often used measurement of expatriate cultural, interaction, and work adjustment (Bhaskar-Shrinivas et al., 2005), and that use has provided substantial amounts of evidence regarding expatriate adjustment (Hechanova et al., 2003; Mendenhall, Kuhlmann, Stahl, & Osland, 2002) it was also used for this measurement purpose in the present study.

Written permission was secured from the original author of the previously-used scales for their inclusion in this study and this permission was lodged, as required, with the Capella University Institutional Research Board before the research study was conducted.

The survey instrument replicated previous studies with the use of either five- or seven-point Likert scales to record respondent answers, depending on each scale. For example, the scale used to measure expatriate cultural, interaction, and work adjustment was a seven-point scale with end anchors of 1 (*Very unadjusted*) and 7 (*Very adjusted*). Both scales were combined into one survey instrument which contained a total of 32 items, including demographic questions (see Appendix B). This final survey instrument, while in the main previously used in this form with traditional expatriates, had not been used with self-selecting expatriates; therefore, pilot testing was required of the instrument to determine item reliability measures for this new population.

Sampling Design

Internal sponsorship of the ethics committees of the 10 targeted colleges and universities provided access to the full faculty rosters at each institution. Although this sampling strategy did not provide for true random sampling, the diverse mixture of faculty in the aggregate in these institutions, as measured by their demographics, moderated any potential sampling error, and by targeting the full faculty populations at the institutions, sampling bias was minimized.

It was estimated that the total population of expatriate academics engaged in teaching and research in the targeted universities was around 1288 employees (Reynolds,

2009, personal communications). Raosoft (2006) recommended a sample size of 297 participants for this population count, given a confidence level of 95%. This sample size would translate into a return rate of 23%. Therefore a target of at least 297 respondents was set to achieve a confidence level of 95% and to support the use of parametric statistical testing.

Data Collection Procedures

The survey instrument was electronically distributed to all currently employed academics (as defined by currently holding an academic position which focuses on teaching, research, or a combination of the two) at 10 higher education institutions in the United Arab Emirates. Access to these targeted populations was obtained through written permission of the ethics committees of the respective universities. These ethics committees are similar in nature and role to an institutional research board. The written permission as provided by these ethics committees was on organizational letterheads and was filed with Capella University's Institutional Research Board for IRB approval prior to any pilot testing or study being conducted. Participants were sent an introductory email by this researcher informing them of the opportunity to take part in the study and were provided a link to the online survey for all but one of the institutions. For the remaining institution, due to prohibitions of bulk emailing faculty, the invitation message was posted to an internal blog on the university's intranet. It should be noted that this researcher is a self-initiating expatriate currently employed in a human resource management role at a semi-government not-for-profit university in Abu Dhabi, UAE. However, research participants were not solicited from the researcher's institution.

The survey was hosted electronically through a third-party service called SurveyMonkey. The first screen of the survey elaborated on the introductory email and provided information to respondents as to the survey purpose, length, and how to contact this researcher for a copy of the results. Respondents were also assured of their confidentiality and of the safekeeping of all data collected. Respondents were informed that completion of the survey would equate to their informed consent to participate in the study. Although respondents were asked some basic demographic questions, they were informed that no personal identification information such as name or organization would be collected, and their responses would be coded to prevent identification. Respondents were also informed that any data reported back to the participating universities would be provided in an aggregate fashion so also to ensure confidentiality of individual responses. Respondents were asked to indicate they had read the instructions on the first screen of the survey by clicking on a button which states “Next”. The entry page was the only page which required forced answering before moving to the next screen.

Respondents were provided a maximum of two weeks in which to participate in the survey. A week after the first invitation email was sent, a follow-up reminder email was sent to prompt those who had not yet responded to do so.

Field Test

Although the survey instrument had been previously authored and its reliability had been shown, it was deemed prudent to administer a field test to ensure its clarity and readability for self-initiating expatriates. Five participants were requested to field test the survey instrument based on either being subject matter experts with quantitative survey

design and/or having similar characteristics to the targeted population (i.e., are self-initiating expatriates in the UAE). All five participants agreed to review the provided material; however only four returned feedback.

Participants were provided with instructions for the field test, a copy of this study's abstract, research questions, hypotheses, participant informed consent letter, the survey instrument, and a list of seven questions to answer for the purposes of the field test. Questions asked if the participant informed consent letter was comprehensive and clear, if the survey instructions were understandable, if the question order was sensible, if the questions were easy to understand, if the length of the survey was acceptable to elicit full completion, if the survey was appropriate for testing the research questions of this study, and if there were any additional comments.

One participant provided useful editing remarks on the participant letter, and also rightly pointed out that the survey instrument did not use questions but rather statements. Therefore, based on this participant's advice, the participant informed consent letter was edited, and instructions in the survey instrument were rewritten to specify "statement" instead of "question". Interestingly, two of the participants could not see the connection between the independent variable 'culture novelty' and the 8-item scale used to measure this construct. Another participant suggested that the acronym UAE not be used in the title of this dissertation; this acronym was therefore replaced on the title page and on the informed consent letter. However, the acronym was still used in the survey instrument, as all participants were living in the UAE and so were readily familiar with the term.

This participant also provided useful suggestions regarding instructions to participants about the online nature of the survey, in that it should be explicitly stated that

to end the survey before completion the participant should close their web browser. This information was added to the participant informed consent letter. Finally, there were a couple of suggestions to modify the instrument; however, modification was not performed so that the instrument would stay a full replication of what has been used before in traditional expatriate adjustment studies.

Pilot Test

This researcher obtained Capella University IRB approval to run a pilot study. Furthermore, this researcher's dissertation committee gave subsequent permission to commence the pilot study upon successful defense of the dissertation proposal. The purpose of this pilot study was to statistically test the reliability of the survey instrument to be used in the full study for this dissertation, as well as to gain some initial perspective into the demographic makeup of the targeted study population. A description of the pilot study process and the results obtained are given below.

An invitation email was sent to potential participants at a higher education institution in the UAE inviting them to take a web-based survey for the purposes of this study. This researcher provided the email to an internal sponsor inside the research site for dissemination to the potential participants. Participants were provided with an introductory message in the email as well as a direct link to the web-based survey which was hosted on the commercial site SurveyMonkey. The first web page of the survey contained full information and instructions regarding the survey, full contact information for this researcher, this researcher's dissertation mentor, and the Capella University

Office of Human Subjects Research. Participants were also informed on the first web page that by completing and submitting their responses to the survey they were providing their informed consent to participate in the study.

During the first week of the pilot study, 12 respondents participated by completing the web-based survey. One week later, a reminder email was sent by the internal sponsor to the entire targeted population asking those who had not already participated in the study to please do so. The reminder email prompted a further three respondents to complete the survey. The pilot study closed after this second week. Out of the total targeted potential population of 65, 15 participants completed the survey, for a return rate of 23.1%. This response rate was acceptable and encouraging, given that this researcher needed to achieve a response rate of 23% for the purposes of the full study to achieve a confidence level of 95%.

Of the total respondents, 53.3% were male. Over 66% were between the ages of 41-50, with a further 26.7% between the ages of 51-60. Eighty percent of the respondents were married. Of those that were married, the spouses of 78.6% were resident in the UAE. Only one third of resident spouses were working full time in the UAE, while 13.3% held part time employment. The remainder of the spouses was not employed. The most frequent nationality reported by the respondents was American (40%), with a further 20% reporting British nationality. Other respondents reported Canadian, Jordanian, New Zealander, and Somali nationality. Two respondents skipped this question. Eighty percent of the respondents had been working for the pilot study institution for more than two years.

All of the respondents had previous international work experience before working for their current employer, with 73.3% having held three or more previous overseas jobs. The remaining respondents were split evenly between having held one previous overseas job and having held two previous overseas jobs. In terms of overall satisfaction with their previous international work experience, 46.7% of respondents reported being very satisfied, with a further 33.3% reporting being satisfied. Only 6.7% reported being dissatisfied, and no respondent reported being very dissatisfied with their previous international work experience.

One third of respondents reported having a conversational level of fluency or higher in one foreign language, while another third of respondents reported having this level of fluency in two foreign languages. One fifth of respondents reported having a conversational level of fluency or higher in three or more foreign languages, while only 13.3% reported not having this level of fluency in any foreign language.

The survey instrument included four previously authored and tested scales. These scales measured culture novelty, cultural adjustment, interaction adjustment, and work adjustment. As these scales had been individually measured in previously published research in terms of their reliability, this researcher also performed reliability analysis on each individual scale. The item-total statistics for each scale are provided in Tables 4-7.

Table 4
Item-total statistics for Culture Novelty Scale

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Everyday customs that must be followed	18.73	45.64	.32	.90
General living conditions	18.80	36.46	.87	.84
Using health care facilities	18.80	36.89	.76	.86
Transportation systems used in the UAE	18.87	41.70	.61	.87
General living costs	18.53	42.84	.58	.88
Available quality and types of foods	18.07	44.35	.49	.88
Climate	19.60	39.54	.82	.85
General housing conditions	18.87	38.98	.77	.86

Table 5
Item-total statistics for Cultural Adjustment Scale

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Living conditions in general	33.57	29.19	.60	.72
Housing conditions	33.86	26.59	.50	.72
Food	33.14	28.59	.70	.71
Shopping	33.79	27.57	.54	.72
Cost of living	34.50	24.89	.38	.77
Entertainment/recreation facilities and opportunities	34.43	24.26	.55	.71
Health care facilities	34.14	29.68	.34	.75

Table 6
Item-total statistics for Interaction Adjustment Scale

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
Socializing with UAE nationals	9.40	15.97	.66	.79
Interacting with UAE nationals on a day-to-day basis	7.60	21.54	.57	.87
Interacting with UAE nationals outside of work	9.27	13.21	.87	.54

Table 7
Item-total statistics for Work Adjustment Scale

	Scale Mean if Item Deleted	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
My specific job responsibilities	10.13	19.84	.59	.81
Performance standards and expectations of my job	10.73	12.35	.83	.48
How adjusted you are to your supervisory duties	11.67	9.67	.64	.08

The eight-item culture novelty scale showed a strong overall reliability value for Cronbach's alpha with a score of .88. This score favorably compared with those previously reported in published research, which ranged from .78 to .88 (Black & Gregersen, 1991; Shaffer et al., 1999; Takeuchi et al., 2002; Van Vianen et al. 2004). The individual item "Everyday customs that must be followed" showed a low level of correlation with the entire scale (.32). However, given that this result was based only on

15 pilot study participants, no consideration was made as to dropping this item from the scale until reliability testing could be performed based on the results of the full study, in which a much higher sample size was achieved.

The seven-item scale for cultural adjustment showed an acceptable overall level of reliability with an alpha result of .76. This result compared favorably with reliability results in published research of .82 (Black & Stephens, 1989). The individual items “Cost of living” and “Health care facilities” showed low levels of correlation with the entire scale (.38 and 0.34 respectively). However, as with the item identified in the culture novelty scale, no consideration was made as to dropping these items from the scale until reliability testing could be performed based on the results of the full study, in which a much higher sample size was achieved.

The three-item interaction adjustment scale showed a strong level of reliability with a reported alpha of .83. This result was comparable to earlier research which reported an alpha of .89 (Black & Stephens, 1989). All individual items on this scale showed acceptable to strong levels of reliability.

The three-item scale for work adjustment reported an acceptable level of reliability with an alpha of .79. This result was slightly lower than earlier reports of reliability at .91 (Black & Stephens, 1989); however the reported alpha of .79 is still well within the level of acceptable levels of reliability. All individual items on this scale showed acceptable to strong levels of reliability.

The results of the pilot study were encouraging and signaled that no problems existed with the reliability of the survey instrument. In particular, the overall reliability statistics for the scales included in the survey instrument showed adequate to strong

levels even with only 15 respondents, and these reported levels were comparable to those reported for full scale studies which had been previously published. In addition, the large response rate was indicative of no problems with the understandability of the instructions or survey, and also indicated that participants felt their rights were well protected in terms of risk and confidentiality. Therefore the results of this pilot study were submitted to Capella University's IRB as support for granting approval to commence the full dissertation study.

Data Analysis

Data analysis was conducted using the statistical software package PASW Statistics 18 for Windows. Descriptive statistics, including mean response scores and standard deviations, were provided. Normality testing, including Shapiro-Wilk statistics, histograms and Q-Q plots were generated. In addition, three major analyses were conducted. First, Cronbach Alpha scores were generated to attest to the reliability of each of the constructs included in the survey instrument. Second, correlation analyses (as measured by Pearson r) were conducted to test the hypothesized relationships among the variables. Third, simultaneous multiple regression analysis was conducted in order to determine each individual factor's impact on the three facets of expatriate adjustment. The inclusion of regression analysis provided insight as to any possible differences of which factors influence SIE adjustment when compared to traditional expatriate adjustment. Finally, exploratory analysis was conducted through the use of ANOVA and post-hoc tests to examine mean differences among groups of the respondents.

Limitations of Methodology

As is true of any research, the design of this study included several limitations which must be transparently made clear to the reader. First, this study employed a one-time survey of targeted participants, thus providing only a cross-sectional, snapshot view of the data collected. Point-in-time data capture does not provide a more in-depth, systematic understanding of how the relationships among the variables might evolve over time.

Second, cross-sectional research has the propensity to suffer from common method variance error. In this study, data collection was only accomplished through respondent self-reporting via a survey instrument. As no data were collected through other perspectives (e.g., spouses, supervisors, employee records) the resultant study became one-dimensional. This narrow focus could possibly miss other relationships or information that cannot be captured from the perspective of the respondent.

Third, because this was a quantitative research project, no qualitative data were collected. This design prohibited the gathering of possibly rich meta-data and analysis that could be used to deepen the understanding of the studied phenomenon.

Finally, for logistical reasons the targeted survey population was limited to expatriate academics currently working at 10 institutions of higher education in the UAE. Although this subpopulation of expatriates is different from traditional expatriates, in that they have self-initiated their own expatriation experiences, they cannot be considered representative of all categories of SIEs (e.g., housemaids, those working for private host country corporations, those working for host country government organizations, and so on). This narrowed selection of study participants thus greatly limited generalizations

which could be made to the greater expatriate population. In addition, there is no indication that academic SIEs in the UAE would similarly compare to their counterparts teaching at colleges and universities not only in the Gulf States but in the rest of the world as well.

In spite of the limitations as described above, this exploratory study filled an important gap in the literature in that it began the process of understanding the adjustment experiences, through empirical means, of SIEs. The results of this study, therefore, can be used as a foundation upon which other studies may be conducted regarding SIEs in the UAE and other parts of the world. In addition, researchers should also employ other methodologies in order to flesh out these initial attempts to understand SIE adjustment. The use of longitudinal studies, as well as other viewpoints on the adjustment experience (i.e., from spouses, employers, and colleagues) would greatly broaden the overall picture of this issue. As the self-selecting contingent of expatriates increases in the globalized workforce, it is critical that scholars begin to study them with the same interest and focus as has been performed to date upon traditional expatriates.

Ethical Considerations

This study did not contain any inherent levels of risks above a minimum level for the participants. Ethical standards were maintained through Capella University IRB approval. Permissions to access the targeted participants were sought by the respective ethics committees at each university, which function as institutional research boards for these organizations. All participants were informed that their participation in the study was voluntary and that they could opt out at any time. Participants were asked to indicate

their informed consent at the beginning of the survey. Participant confidentiality was protected through such measures as not collecting personal identification information, such as name, but rather identifying each respondent with an assigned code. All responses were further matched to the participant code only. All data were collected solely by this researcher. Data were electronically safeguarded with a password required for access. Data are being securely stored, through password protection, for the requisite seven years, at which time they will be destroyed by electronic wiping of the hard drive and external devices upon which they have been kept.

CHAPTER 4. RESULTS

This chapter presents the results of the statistical analyses performed to answer the research questions of this study. Initially, the distribution of the online survey and the response rates obtained is discussed, and an overview of the participant demographics is presented. Next, the reliability of the individual scales used in the survey is analyzed. Normality testing was also conducted to confirm the predicted use of parametric tests on the data. The descriptive statistics for the variable scales are also presented in this section.

After these preliminary analyses are discussed, this chapter next turns to the testing of the alternative hypotheses of this study. Some peculiarities around missing data, and how these were treated, are presented. Hypotheses were tested through Pearson Correlation tests. The analyses discussed in this chapter up to this point are used to answer the first and second research questions in the next chapter. To answer the third research question, this chapter continues with a discussion of the exploratory analyses that were used in analyzing the data for this study. First, simultaneous multiple regression tests were run on the independent variable identified as having a statistically significant relationship with the dependent variables. All control variables except one were included in the regression analysis. Furthermore, control variables were divided up into logical groupings to test for significant differences in means for all three facets of sociocultural adjustment. Where such differences were found, additional post-hoc testing was conducted to pinpoint how those means actually differed. This chapter ends with a summary of the results.

Survey Distribution and Return Rates

As described in the previous chapter, an invitation to participate in this study by taking an online survey was distributed to 1288 expatriate academics currently working in 10 higher educational institutions in the UAE. In nine of the institutions the invitation was sent directly to the faculty members' work email addresses by an internal sponsor within the institution. For the tenth institution (described here as Institution 09), due to prohibitions of bulk emailing faculty, the invitation message was posted to an internal blog on the university's intranet.

The survey was available online for a period of two weeks, during which time a follow-up email was also sent to targeted participants asking them to take the survey if they had not already done so. At the institution where the invitation message was only posted on the internal blog, the initial message was reposted three separate times, as the original posting would lose visibility as other survey requests and announcements were posted to the blog.

Out of the total targeted population of 1,288 expatriate academics, 309 respondents took the survey, for an aggregate response rate of 23.99%. Response rates varied by institution. Responses for two campuses of one institution were combined as the internal sponsor did not separate the invitation email sent to targeted participants at the two campuses. The response rate for Institution 09 was much lower than the other institutions; it is supposed that this is a result of the lack of targeted email distribution of the invitation to participate in the survey, as participants would have had to choose to view the internal blog posting on the institution's intranet to see the invitation message. An examination of the raw data tables once the survey was closed indicated that 11

respondents did not complete the full survey, and one respondent self-identified as a UAE National (so by default was not an expatriate academic); therefore, these respondents were removed before data analysis was conducted. This action resulted in a final response of 297 participants, for an adjusted response rate of 23.06%. This response rate satisfies the requirements needed for subsequent hypothesis testing at a 95% confidence level as described in the previous chapter.

Demographics of Participants

For all but two of the demographic questions on the survey there were missing responses. Therefore the demographics of the survey sample are reported with adjusted *N* sizes for each demographic item.

For the demographic item of gender, 55.4% of respondents self-reported as female (*N* = 296). Twenty-two percent of the respondents were ages 31-40, over 46% of respondents were between the ages of 41-50, with a further 24.1% in the age category of 51-60 (*N* = 295). Over 76% of the respondents were married (*N* = 297). Of those that were married, the spouses of 92.4% were resident in the UAE. Over 60% of resident spouses were employed full-time in the UAE, while 8.7% were employed part-time. Thirty percent of resident spouses were not employed.

Respondents self-reported 26 different nationalities (*N* = 286). The most frequent nationality reported by the respondents was British⁷, with a frequency of 29.7%. The three next most frequently reported nationalities were American (19.9%), Canadian (14.7%), and Australian (9.8%). The collective frequency of these four nationalities was

⁷ The term *British* is an aggregate nationality used to describe self-reported responses of UK, English, Scottish, Welsh, and British.

74.1%. The remainder of the respondents hailed from Europe, the Middle East, Asia, Africa, Oceania, and South America (see Appendix C for the full listing of participant nationalities).

Almost 73% of respondents reported working for their current institution for two or more years ($N = 295$). Seventy-two percent of respondents reported a Master's degree as the highest degree earned, while 17.6% reported their highest degree as a Doctorate ($N = 296$). Over 87% of respondents had previous overseas work experience ($N = 297$), with almost 76% of those having held at least two previous overseas jobs. In terms of overall satisfaction with their previous international work experiences, 38% of respondents reported being very satisfied, with a further 36% reporting as satisfied ($N = 250$). Only 6.4% of respondents reported being dissatisfied or very dissatisfied with their previous overseas work experiences.

One third of respondents reported having a conversational level of fluency or higher in one foreign language, while 25.3% reported having this level of fluency in two foreign languages ($N = 296$). Over 13% of respondents reported having at least a conversational level of fluency in three or more foreign languages. Almost 28% reported not having this level of fluency in any foreign language.

Survey Reliability

The survey instrument included four previously authored (Black & Stephens, 1989) and tested (Black & Gregersen, 1991; Black & Stephens, 1989; Shaffer et al., 1999; Takeuchi et al., 2002; Van Vianen et al., 2004) scales. These scales measured the constructs of culture novelty, cultural adjustment, interaction adjustment, and work

adjustment. These scales have been individually measured for reliability in both previously published research and in the pilot study of this dissertation; therefore reliability analysis was again performed on each individual scale. The testing of the hypotheses of this study required a reliability analysis of these scales on the aggregate data, while further exploratory analysis, which will be reported later in this chapter, necessitated reliability testing of these scales by each individual institution. The results of both levels of reliability analysis are therefore reported. For purposes of clarity, the results of this analysis will be discussed for each construct.

Culture Novelty

For the aggregate data set, the 8-item culture novelty scale showed a slightly lower Cronbach alpha value of .73 than the range of values of .78-.88 previously reported in published research (Black & Gregersen, 1991; Shaffer et al., 1999; Takeuchi et al., 2002; Van Vianen et al., 2004), and a much lower value than the result of the pilot study ($\alpha = .88$). This value was based on a sample of 277 respondents after listwise deletion was performed. The Cronbach alpha values for the individual research sites ranged from .65 to .77. Although the value for the aggregate data set is lower than what has previously been reported, an examination of the item-total statistics for this scale indicates that the deletion of any item from the scale would not result in an increased Cronbach alpha value.

Cultural Adjustment

For the aggregate data set, the 7-item scale for cultural adjustment showed a strong level of reliability with a Cronbach alpha value of .85, which is a higher value than the result of the pilot study ($\alpha = .76$) and value of .82 as reported earlier by Black and

Stephens (1989). This value was based on a sample of 279 respondents after listwise deletion was performed. The Cronbach alpha values for the individual institutions ranged from .69 to .88. All items tested at the aggregate level showed good corrected item-total correlations.

Interaction Adjustment

For the aggregate data set, the 3-item interaction adjustment scale showed a strong Cronbach alpha value of .83, which equates exactly to the value for this scale on the pilot study and is comparable to the value of .89 as reported in earlier research (Black & Stephens, 1989). This value was based on a sample of 265 respondents after listwise deletion was performed (see the section Hypothesis Testing later in this chapter for a discussion of the level of missing responses on this scale). The Cronbach alpha values for the individual institutions ranged from .75 to .90. An examination of the item-total statistics reveals that the individual item of Day-to-Day Interaction is not as strongly correlated to the overall scale as the other two items of Socializing with UAE Nationals and Interaction with UAE Nationals Outside of Work. However, the effect of deleting this item from the scale would be marginal, and so it was retained for subsequent hypothesis testing.

Work Adjustment

For the aggregate data set, the 3-item work adjustment scale showed a very strong Cronbach alpha value of .94, which is much higher than that of the pilot study ($\alpha = .79$) and is very comparable to reported reliability value of .91 by Black and Stephens (1989). This value was based on a sample of 198 respondents after listwise deletion was performed (see the section Hypothesis Testing later in this chapter for a discussion of the

level of missing responses on this scale). The Cronbach alpha values for all but one of the individual institutions ranged from .87 to .97. Institution 09 showed a much lower alpha of .65. All items tested at the aggregate level showed strong corrected item-total correlations.

Normality Testing

Several different statistical tests were performed to determine the normality of the aggregate data set. First, Shapiro-Wilk statistics were generated on each of the variable scales. Next, histograms with superimposed normal curves and Q-Q plots were generated for each scale. Skewness and kurtosis scores were also generated for each scale.

Without exception, all dependent variable scales on the Shapiro-Wilk test indicated non-normality with a significance level of $p < .001$. Only the independent variable of culture novelty resulted in an indication of normality on this test through a non-significant value of .94. However, a visual examination of the histograms and Q-Q plots indicated only moderate negative (J-shaped) skewness for cultural adjustment and work adjustment, and minimal positive (L-shaped) skewness for interaction adjustment. The histogram and Q-Q plot examination for culture novelty indicated an almost normal distribution. This visual examination was confirmed by the skewness scores for these variables: cultural adjustment = -0.70, interaction adjustment = 0.26, work adjustment = -1.05 and culture novelty = 0.20. Both a visual examination of the histograms and the generated kurtosis scores reveal minimal kurtosis for cultural adjustment (0.12), significant kurtosis for interaction adjustment (-1.01), moderate kurtosis for work adjustment (0.71) and minimal kurtosis for culture novelty (-0.03).

A visual examination of box plots for the individual variables revealed a small amount of outliers. Four outliers were reported on the cultural adjustment scale, none on the interaction adjustment scale, three on the work adjustment scale, and one on the culture novelty scale. An outlier was defined as any value at more than three standard deviations from the mean. All outliers were temporarily deleted from the data set and the tests for normality as described above were re-administered. The removal of the outliers from the aggregate data set did not result in any marked decrease of skewness or kurtosis, nor were there any changes to the results of the Shapiro-Wilk test. A decision was made, therefore, that the outliers would be included in all further data analysis so as not to affect the sample size.

Although there is evidence that the variables in this study are not normally distributed, this evidence is moderate enough that normality was still assumed for this study and transformations were not needed. Vasu (1979, as cited by Garson, 2010) has opined that as long as the data are not extremely asymmetrical, inferential and exploratory data analysis such as was performed in this study, are robust against moderate deviations from normality. In addition, there is strong evidence that the data for this study should be treated as normally distributed. First, the sample size of 297 out of a population of 1288 is large. This sample size is large enough that results no lower than a confidence level of 95% were decided in advance to be considered as significant. In addition, precepts of Central Limit Theorem indicate that the larger the sample size, the more its normal representation of the population can be assumed. Furthermore, the distances between the mean and median values on the variable scales are minimal (see Table 8 for full descriptive statistics of all three dependent variables); this further

strengthens the argument that the sample is in all probability a normally distributed representation of the population, as true normality occurs when the distance between the mean and the median is zero. Therefore, the results of the normality testing confirm the decision made during the research design phase of this study to use parametric tests during the data analysis. The results of these tests are described in the next section.

Table 8
Descriptive Statistics for Variable Scales (N = 297)

	Cultural Adjustment	Interaction Adjustment	Work Adjustment	Culture Novelty
Mean	5.51	3.75	5.46	2.68
Median	5.71	3.67	6.00	2.63
Mode	7.00	3.00	7.00	2.25
Std. Deviation	1.08	1.78	1.43	0.65
Variance	1.16	3.17	2.03	0.42
Skewness	-0.70	0.26	-1.05	0.20
Std. Error of Skewness	0.14	0.14	0.14	0.14
Kurtosis	0.12	-1.01	0.71	-0.03
Std. Error of Kurtosis	0.28	0.28	0.28	0.28
Range	5.00	6.00	6.00	4.00
Minimum	2.00	1.00	1.00	1.00
Maximum	7.00	7.00	7.00	5.00

Hypothesis Testing

Given the preceding discussion of the underlying characteristics of the data for this study, the next step of analysis is the testing of the hypotheses. However, before

these results are reported, some peculiarities in the data, at the more granular level of the individual variables used to construct the hypotheses, need to be discussed.

The hypotheses were constructed via predicted relationships between three independent variables and three dependent variables. The three independent variables are foreign language ability, previous overseas work experience, and culture novelty. The three dependent variables are cultural adjustment, interaction adjustment, and work adjustment. The independent variable culture novelty and all three dependent variables used Likert scales for collecting the data, and then for the purposes of hypothesis testing, the responses were summed and averaged to create composite variable scores.

The three dependent variable scales provided response choices ranging from 1 to 7, with 1 signifying *very unadjusted*, and 7 signifying *very adjusted*. In addition, it was assumed that the possibility existed that individual items on these scales may not be applicable to the sample population. For example, the entire sample consisted of expatriate academics. Many of these respondents may not hold supervisory responsibilities, an item on the work adjustment scale. Therefore, an additional response choice of N/A was provided on the survey instrument.

There were very few missing values for most of the items which constituted the three dependent variable scales ($0 < n < 7$). However, a substantial number of respondents selected the N/A choice on certain items on the interaction adjustment scale and the work adjustment scale. Specifically, out of a total sample population of 297, 19 respondents either skipped or chose N/A for the interaction adjustment item of Socializing with UAE Nationals, and 20 either skipped or chose N/A for the item of Interaction with UAE Nationals Outside of Work. Furthermore, for the item of

Supervisory Responsibilities on the work adjustment scale, 31% of respondents, or 92, either skipped this item or selected the response of N/A. Table 9 provides a summary of these occurrences.

Table 9
Summary of Missing and N/A Responses for Selected Items

Item	N	Percent	Missing, N/A response	Percent
<i>Interaction Adjustment Scale</i>				
Socializing with UAE Nationals	278	93.60%	19	6.40%
Interaction with UAE Nationals Outside of Work	277	93.30%	20	6.70%
<i>Work Adjustment Scale</i>				
Supervisory Responsibilities	205	69.00%	92	31.00%

In addition to this situation in the data, another peculiarity regarding the interaction adjustment scale was revealed. For those respondents who did select a choice within the Likert value range for the two items of Socializing with UAE Nationals and Interaction with UAE Nationals Outside of Work, the resultant means for these items were substantially lower than the mean for the third item on the scale, Day to Day Interaction with UAE Nationals. Table 10 provides a summary of the noteworthy distances between the means of the interaction adjustment scale items.

Table 10
Comparison of Mean Values for Interaction Adjustment Scale Items

	Mean	95% Confidence Interval for Mean		Std. Deviation
		Lower Bound	Upper Bound	
Socializing with UAE Nationals	2.93	2.70	3.16	1.95
Day to Day Interaction with UAE Nationals	4.92	4.70	5.15	1.97
Interaction with UAE Nationals Outside of Work	3.07	2.83	3.31	2.01

There are several possible explanations for these anomalies in the data. First, as discussed in chapter two, UAE Nationals make up only a very small percentage of the overall population of the UAE, and this percentage also varies depending on the city. For example, while Emiratis constitute about 33% of the population of the city of Abu Dhabi (Statistics Center–Abu Dhabi, 2005), they constitute less than 17% of the population of Dubai (GUM, 2010). Therefore, based not only on the small aggregate percentage of Emiratis in relation to total population figures, in some cities Emirati presence is marginal at best. As a result, even if desired, an expatriate may have little chance for interaction or socializing with Emiratis outside of the workplace. In contrast, eight of the 10 institutions at which these data were collected only admit Emiratis into the student bodies. Therefore, on a day to day basis, the respondents would be heavily interacting with their Emirati students—thus resulting not only in a greater frequency of this type of

interaction with host country nationals but also the possibility of higher levels of adjustment.

In terms of the item of Supervisory Responsibilities on the work adjustment scale, the substantial amount of missing and N/A values in this data set confirms that a large number of academics do not hold supervisory responsibilities. For example, as reported earlier in this chapter, the vast preponderance of respondents reported their highest degree earned as a Master's degree (72.3%), with far fewer reported holding a Doctorate (17.6%). This demographic split is congruent with two characteristics of the higher education institutions at which the survey was distributed. First, seven of the institutions are, in the main, equivalent in mission to U.S.-style community colleges, in that they offer very few baccalaureate and graduate degree programs and instead mainly offer diplomas and higher diplomas which are earned over the course of one to three years. Therefore, even for content courses, instructors are only required to have a Master's degree to teach these subjects. Second, all of the institutions included in this study have sizeable "foundation programs", in which the majority of Emirati students must first attend to raise their English skills up to a level at which they may function in the content courses (the majority of which are taught in English). Academics that are hired to teach English as a Foreign Language in these foundation programs are only required to have a Master's degree. As a result, the low amount of Doctorate-holding respondents, coupled with the related small amount of those that would likely be teaching in baccalaureate or graduate programs, means that normal supervisory activities (e.g., supervising student theses, research, teaching and research assistants) for academics would be greatly reduced.

These peculiarities are noted as a point of interest in this data set and will be discussed at greater length in the next chapter. For the purposes of hypothesis testing, after determining that these cases of missing and N/A items did not affect the reliability of the scales, a decision was made to sum and average the responses on an individual basis in order to create the composite values for the variables. Once these calculations were conducted, the data were in shape for the hypotheses testing stage.

Alternative Hypotheses

The alternative hypotheses are reiterated as follows:

- H1a. Foreign language ability will have a positive relationship with SIE cultural adjustment.
- H1b. Foreign language ability will have a positive relationship with SIE interaction adjustment.
- H1c. Foreign language ability will have a positive relationship with SIE work adjustment.
- H2a. Previous overseas work experience will have a positive relationship with SIE cultural adjustment.
- H2b. Previous overseas work experience will have a positive relationship with SIE interaction adjustment.
- H2c. Previous overseas work experience will have a positive relationship with SIE work adjustment.
- H3a. Culture novelty will have a negative relationship with SIE cultural adjustment.
- H3b. Culture novelty will have a negative relationship with SIE interaction adjustment.
- H3c. Culture novelty will have a negative relationship with SIE work adjustment.

The hypotheses are grouped around the three independent variables of this study: foreign language ability, previous overseas work experience, and culture novelty. Therefore, this section will be organized according to hypothesis grouping.

Foreign Language Ability

Three hypotheses predicted a positive relationship between the independent variable foreign language ability and the three facets of SIE sociocultural adjustment as dependent variables:

- H1a. Foreign language ability will have a positive relationship with SIE cultural adjustment.
- H1b. Foreign language ability will have a positive relationship with SIE interaction adjustment.
- H1c. Foreign language ability will have a positive relationship with SIE work adjustment.

A higher score for foreign language ability indicates a higher number of foreign languages in which the respondent is at a conversational level of fluency or higher. A higher score on each of the three sociocultural adjustment variables indicates a greater degree of adjustment.

As illustrated in Table 11, the independent variable of foreign language ability showed no statistically significant Pearson Correlation with any of the three dependent variables of cultural adjustment, interaction adjustment, or work adjustment. Therefore, alternative Hypotheses H1a, H1b, and H1c were not supported. This indicates that for this sample of SIEs, there is no relationship between foreign language ability and any of the facets of sociocultural adjustment.

Table 11
Pearson Correlations for the Independent Variable Foreign Language Ability (N = 297)

Variables	Mean	SD	1	2	3	4
1. Foreign Language Ability	2.25	1.01	1			
2. Cultural Adjustment	5.51	1.08	.02	1		
3. Interaction Adjustment	3.75	1.78	.02	.47**	1	
4. Work Adjustment	5.47	1.43	-.01	.50**	.38**	1

** Correlation is significant at the 0.01 level (2-tailed).

A visual examination of the corresponding scatter plots confirmed a lack of relationship between foreign language ability and the three facets of sociocultural adjustment.

Previous Overseas Work Experience

Three hypotheses predicted a positive relationship between the independent variable previous overseas work experience and the three facets of SIE sociocultural adjustment as dependent variables:

- H2a. Previous overseas work experience will have a positive relationship with SIE cultural adjustment.
- H2b. Previous overseas work experience will have a positive relationship with SIE interaction adjustment.
- H2c. Previous overseas work experience will have a positive relationship with SIE work adjustment.

A higher score for previous overseas work experience as measured quantitatively indicates a higher number of those experiences which the respondent has had. A higher score for previous overseas work experience as measured qualitatively indicates a higher

degree of satisfaction with previous overseas work experiences. A higher score on each of the three sociocultural adjustment variables indicates a greater degree of adjustment.

As illustrated in Table 12, the independent variable of previous overseas work experience, when measured quantitatively, showed no statistically significant Pearson Correlation with any of the three dependent variables of cultural adjustment, interaction adjustment, or work adjustment. However, when measured qualitatively, a statistically significant Pearson Correlation was found with cultural adjustment and work adjustment (see Table 13). Therefore, alternative Hypotheses H2a, H2b, and H2c were not supported in terms of how many previous overseas work experiences were held, but alternative Hypotheses H2a and H2c were supported in terms of degree of satisfaction with previous overseas work experience(s). This indicates that, for this sample of SIEs, there is some evidence of a positive relationship between previous overseas work experience and the facets of cultural adjustment and work adjustment.

Table 12
Pearson Correlations for the Independent Variable Previous Overseas Work Experience as Measured Quantitatively (N = 297)

Variables	Mean	SD	1	2	3	4
1. Previous Overseas Work Experience	3.15	1.07	1			
2. Cultural Adjustment	5.51	1.08	.09	1		
3. Interaction Adjustment	3.75	1.78	.01	.47**	1	
4. Work Adjustment	5.47	1.43	.04	.50**	.38**	1

** Correlation is significant at the 0.01 level (2-tailed).

Table 13

Pearson Correlations for the Independent Variable Previous Overseas Work Experience as Measured Qualitatively (N = 297)

Variables	Mean	SD	1	2	3	4
1. Degree of Satisfaction with Previous Overseas Work Experience(s)	4.02	1.00	1			
2. Cultural Adjustment	5.51	1.08	.25**	1		
3. Interaction Adjustment	3.75	1.78	.11	.47**	1	
4. Work Adjustment	5.47	1.43	.13*	.50**	.38**	1

* Correlation is significant at the 0.05 level (2-tailed).

** Correlation is significant at the 0.01 level (2-tailed).

Culture Novelty

Three hypotheses predicted a negative relationship between the independent variable culture novelty and the three facets of SIE sociocultural adjustment as dependent variables:

- H3a. Culture novelty will have a negative relationship with SIE cultural adjustment.
- H3b. Culture novelty will have a negative relationship with SIE interaction adjustment.
- H3c. Culture novelty will have a negative relationship with SIE work adjustment.

A lower score for culture novelty indicates a greater degree of cultural distance between the culture of the UAE and the respondent's home culture. A higher score on each of the three sociocultural adjustment variables indicates a greater degree of adjustment.

As illustrated in Table 14, the independent variable of culture novelty showed statistically significant Pearson Correlations with all of the three dependent variables of cultural adjustment, interaction adjustment, or work adjustment. Therefore, alternative Hypotheses H2a, H2b, and H2c were all supported. This indicates that, for this sample of SIEs, there is a negative relationship between culture novelty and all of the facets of sociocultural adjustment. However, it must be noted that the strength of these relationships is weak at best.

Table 14
Pearson Correlations for the Independent Variable Culture Novelty (N = 297)

Variables	Mean	SD	1	2	3	4
1. Culture Novelty	2.68	.65	1			
2. Cultural Adjustment	5.51	1.08	.27**	1		
3. Interaction Adjustment	3.75	1.78	.22**	.47**	1	
4. Work Adjustment	5.47	1.43	.13**	.50**	.38**	1

** Correlation is significant at the 0.01 level (2-tailed).

A visual examination of the corresponding scatter plots confirmed rather weak but linear negative relationships between culture novelty and the three facets of sociocultural adjustment.

Exploratory Analysis

In keeping with the exploratory nature of this study and in preparation for answering the third research question, a number of exploratory analyses were performed

on the data. The results of these analyses will be organized by statistical testing method below.

Regression Models

As discussed in the previous chapter, regression models were slated to be conducted for each of the dependent variables. However, as the results of the previously reported Pearson Correlations indicated no significant relationships between the independent variables of foreign language ability and a quantitative measure of previous overseas work experience with any of the dependent variables, a decision was made to exclude these two factors from the subsequent regression testing and include as predictors only the independent variable of culture novelty, the qualitative measure of previous overseas work experience, and the control variables as listed previously. Upon further consideration, the predictor variable of nationality was not included in the predictor list given that there was no appropriate method through which to dummy code this dichotomous variable to ensure accurate groupings.

For example, it was discussed earlier in this chapter that 74.1% of respondents listed their nationality as British, American, Canadian, or Australian. However, as the survey question asked for the nationality as listed in the respondent's passport, it is impossible from these results to determine if a respondent was native born to the nationality reported or obtained that nationality through naturalization later in life. It is a non-trivial occurrence of SIEs working in the UAE who hold passports from these four countries but who originally were born and raised in an Arab country such as Jordan, Lebanon, Syria, or Egypt. Therefore, as no determination could be made as to the

influence of a nation's culture on the respondent, this variable was not included as a predictor in the regression models.

Nine predictor variables were used in the regression analysis: culture novelty, gender, age grouping, marital status, highest degree earned, degree of satisfaction with previous overseas work experience, length of employment in current job, employing institution, and location by city⁸. As this study was exploratory in nature, simultaneous regression was the mode chosen for predictor variable entry. In addition, to minimize any possible loss of predictive power of the models, pairwise deletion was used to ensure the sample size remained as large as possible.

Cultural adjustment. A significant model emerged when testing the dependent variable cultural adjustment ($F_{9,239} = 6.65, p < .001$). However, this model is weak in that it only explains 17% of the variance in the dependent variable (Adjusted R square = .17). The significant predictor variables were culture novelty, gender, degree of satisfaction with previous overseas work experience, and length of employment in current job. Multicollinearity in the predictor variables was not an issue in this model, given the very high tolerances. In addition, the distribution of residuals and the plot of standardized predicted scores and standardized residuals show that the residuals were approximately normally distributed and that the assumption of homoscedasticity was met. Table 15 provides a summary of the results of this regression model.

As only a minority of the variance of cultural adjustment was explained by the above regression model, the non-significant predictor variables were removed and subsequent simultaneous regression analysis was conducted. Again, a significant model

⁸ The variable location by city was created by assigning a value to each of the four cities in which the employing institutions were located and then coding each respondent accordingly.

emerged ($F_{4,244} = 13.13, p < .001$); however there was little change in the amount of variance explained (Adjusted R square = .16). The implication of these results will be discussed in the next chapter.

Table 15
Results of Regression Analysis with Cultural Adjustment as the Dependent Variable

Predictor Variable	N	B	SE_B	β	t	p	Tolerance
Employing institution	297	.05	.03	.11	1.77	.078	.89
Gender	296	.28	.13	.13	2.13	.034	.93
Age grouping	295	.13	.08	.11	1.79	.075	.89
Highest degree earned	296	.02	.07	.02	0.28	.805	.94
Marital status	297	.13	.15	.05	0.87	.387	.94
Degree of satisfaction with previous overseas work experience	250	.22	.07	.21	3.43	.001	.91
Length of employment in current position	295	.22	.08	.18	2.86	.005	.87
Culture novelty	297	.40	.10	.24	4.01	.000	.93
Location by city	297	-.01	.07	-.01	-0.15	.883	.89

Note. $R^2 = .20$, Adjusted $R^2 = .17$, $F_{9,239} = 6.65, p < .001$.

Interaction adjustment. A significant model emerged when testing the dependent variable interaction adjustment ($F_{9,239} = 3.37, p = .001$). However, this model is weak in that it only explains 7.9% of the variance in the dependent variable (Adjusted R square = .08). The significant predictor variables were culture novelty and length of

employment in current job. Multicollinearity in the predictor variables was not an issue in this model, given the very high tolerances. In addition, the distribution of residuals and the plot of standardized predicted scores and standardized residuals show that the residuals were approximately normally distributed and that the assumption of homoscedasticity was met. Table 16 provides a summary of the results of this regression model.

As only a minority of the variance of interaction adjustment was explained by the above regression model, the non-significant predictor variables were removed and subsequent simultaneous regression analyses were conducted. Again, a significant model emerged ($F_{2,292} = 13.08, p < .001$); however there was little change in the amount of variance explained (Adjusted R square = .08). The implication of these results will be discussed in the next chapter.

Table 16
Results of Regression Analysis with Interaction Adjustment as the Dependent Variable

Predictor Variable	N	B	SE_B	β	t	p	Tolerance
Employing institution	297	-.02	.05	-.03	-0.44	.658	.89
Gender	296	.29	.23	.08	1.29	.198	.93
Age grouping	295	.04	.13	.02	0.30	.761	.89
Highest degree earned	296	-.06	.12	-.03	-0.50	.617	.94
Marital status	297	.03	.26	.01	0.12	.902	.94
Degree of satisfaction with previous overseas work experience	250	.18	.11	.10	1.62	.108	.91

Table 16 *continued*.

Predictor Variable	<i>N</i>	<i>B</i>	<i>SE_B</i>	β	<i>t</i>	<i>p</i>	Tolerance
Length of employment in current position	295	.40	.13	.20	3.00	.003	.87
Culture novelty	297	.56	.17	.20	3.21	.002	.93
Location by city	297	-.21	.12	-.12	-1.87	.063	.89

Note. $R^2 = .113$, Adjusted $R^2 = .08$, $F_{9,239} = 3.37$, $p = .001$.

Work adjustment. A significant model emerged when testing the dependent variable work adjustment ($F_{9,239} = 4.00$, $p < .001$). However, this model is weak in that it only explains 9.8% of the variance in the dependent variable (Adjusted R square = .10). The significant predictor variables were degree of satisfaction with previous overseas work experience, length of employment in current job, and location by city. Multicollinearity in the predictor variables was not an issue in this model, given the very high tolerances. In addition, the distribution of residuals and the plot of standardized predicted scores and standardized residuals show that the residuals were approximately normally distributed and that the assumption of homoscedasticity was met. Table 17 provides a summary of the results of this regression model.

As only a minority of the variance of work adjustment was explained by the above regression model, the non-significant predictor variables were removed and subsequent simultaneous regression analysis was conducted. Again, a significant model emerged ($F_{3,246} = 10.03$, $p < .001$); however there was little change in the amount of variance explained (Adjusted R square = .10). The implication of these results will be discussed in the next chapter.

Table 17
Results of Regression Analysis with Work Adjustment as the Dependent Variable

Variable	<i>N</i>	<i>B</i>	<i>SE_B</i>	β	<i>t</i>	<i>p</i>	Tolerance
Employing institution	297	.03	.04	.05	0.82	.414	.89
Gender	296	.14	.18	.05	0.75	.452	.93
Age grouping	295	.04	.10	.02	0.36	.716	.89
Highest degree earned	296	.11	.10	.07	1.09	.278	.94
Marital status	297	-.28	.21	-.08	-1.34	.182	.94
Degree of satisfaction with previous overseas work experience	250	.24	.09	.17	2.65	.009	.91
Length of employment in current position	295	.33	.11	.20	3.09	.002	.87
Culture novelty	297	.18	.14	.08	1.31	.190	.93
Location by city	297	-3.00	.09	-.21	-3.25	.001	.89

Note. $R^2 = .13$, Adjusted $R^2 = .10$, $F_{9,239} = 4.00$, $p < .001$.

One-Way Analysis of Variance and Post Hoc Testing

Further exploratory analysis was conducted on the aggregate data set through the use of one-way analysis of variance (ANOVA) testing, and where appropriate, mean plots and post hoc Tukey honestly significant difference (HSD) testing. As no hypotheses were set out in this study regarding differences between group means, each control variable was divided up into logical groupings to determine if significant differences existed between the means of each group for all three facets of sociocultural adjustment. All ANOVA and post hoc testing in this study was performed under the

bounds of a 95% confidence level to indicate statistical significance. All ANOVA tests excluded cases analysis by analysis. The results are organized below by each control variable.

Gender. A one-way ANOVA was used to test for mean differences by gender for each facet of sociocultural adjustment. There were no significant differences by gender for any of the three facets of adjustment: cultural adjustment: $F_{1,294} = 3.67, p = .056$; interaction adjustment: $F_{1,294} = 1.02, p = .314$; work adjustment: $F_{1,294} = 0.54, p = .462$. As no significant differences were found between gender groups, neither mean plots nor post hoc testing was performed.

Marital Status. A one-way ANOVA was used to test for mean differences by marital status for each facet of sociocultural adjustment. There were no significant differences by marital status for any of the three facets of adjustment: cultural adjustment: $F_{1,295} = 1.90, p = .169$; interaction adjustment: $F_{1,295} = 0.02, p = .88$; work adjustment: $F_{1,295} = 1.44, p = .231$. As no significant differences were found between marital status groups, neither mean plots nor post hoc testing was performed.

Nationality. A one-way ANOVA was used to test for mean differences by nationality for each facet of sociocultural adjustment. There were no significant differences by nationality for any of the three facets of adjustment: cultural adjustment: $F_{25,260} = 1.38, p = .111$; interaction adjustment: $F_{25,260} = 0.78, p = .764$; work adjustment: $F_{25,260} = 1.29, p = .168$. As no significant differences were found between nationality groups, neither mean plots nor post hoc testing was performed.

Age Grouping. A one-way ANOVA was used to test for mean differences by age grouping for each facet of sociocultural adjustment. There was no significant

difference in means by age grouping for work adjustment ($F_{4,290} = 0.77, p = .544$). However, significant differences were found for cultural adjustment ($F_{4,290} = 2.66, p = .033$) and interaction adjustment ($F_{4,290} = 2.42, p = .049$). As significant differences were found between age groups on cultural adjustment and interaction adjustment, Tukey HSD tests and mean plots were conducted to compare how the means between age groups differed on these two facets of adjustment.

Tukey post-hoc comparisons of the age groupings indicate that respondents in the age grouping of 51-60 ($M = 5.67, 95\% CI [5.40, 5.94]$) have significantly higher cultural adjustment levels than those in the age group of 31-40 ($M = 5.16, 95\% CI [4.88, 5.44]$), $p = .045$. Comparisons between the remaining age groupings were not statistically significant at $p < .05$. Tukey HSD comparisons of the age grouping means for interaction adjustment did not reveal any statistically significant differences. Figure 2 shows the mean plot for the mean differences in cultural adjustment for the age groupings.

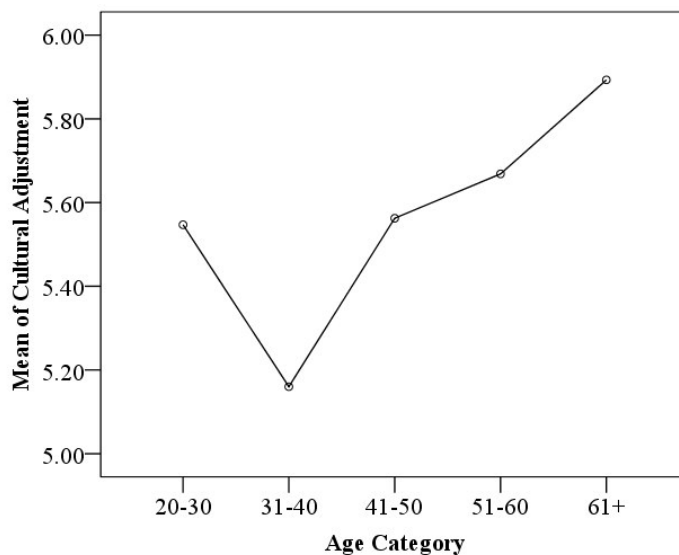


Figure 2. Plot of mean differences of cultural adjustment by age category.

Highest Degree Earned. A one-way ANOVA was used to test for mean differences by highest degree earned for each facet of sociocultural adjustment. There was no significant difference in means of highest degree earned for interaction adjustment ($F_{4,291} = 1.19, p = .126$) or work adjustment ($F_{4,291} = .57, p = .682$). However, a significant difference in means was found for cultural adjustment ($F_{4,291} = 2.42, p = .049$). As a significant difference was found between the highest degree earned groups on cultural adjustment, the Tukey HSD test and a mean plot were conducted to compare how the means between the highest degree earned differed on cultural adjustment.

A Tukey post-hoc comparison of the highest degree earned groups indicate that respondents with the highest degree of a Master's degree ($M = 5.59, 95\% CI [5.45, 5.72]$) have significantly higher cultural adjustment levels than those with a highest degree earned of Bachelor's degree ($M = 4.90, 95\% CI [4.25, 5.55]$), $p = .043$. Comparisons between the remaining highest degree earned groupings were not statistically significant at $p < .05$. Figure 3 shows the mean plot for the mean differences in cultural adjustment for the highest degree earned groupings.

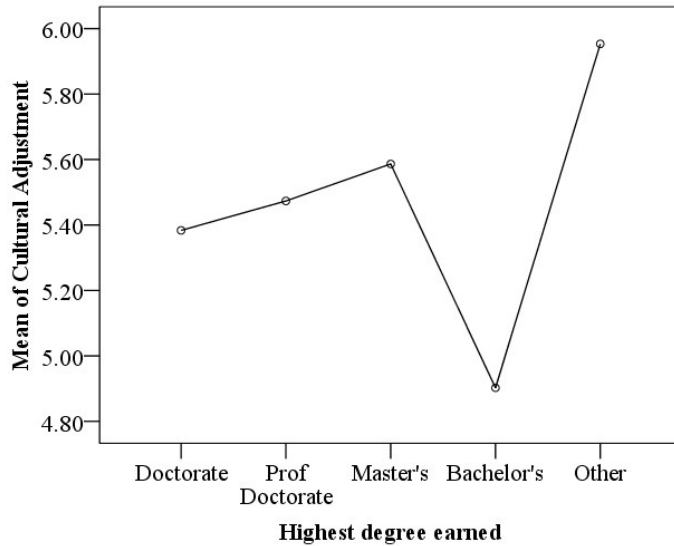


Figure 3. Plot of mean differences of cultural adjustment by highest degree earned.

Degree of Satisfaction with Previous Overseas Work Experience. A one-way ANOVA was used to test for mean differences by the degree of satisfaction with previous overseas work experience for each facet of sociocultural adjustment. There was no significant difference in means for interaction adjustment ($F_{5,244} = 1.95, p = .087$). A significant difference in means was found for cultural adjustment ($F_{5,244} = 5.13, p < .001$) and for work adjustment ($F_{5,244} = 3.02, p = .011$). As a significant difference was found between the degree of satisfaction with previous overseas work experience groups on cultural adjustment and work adjustment, mean plots were conducted to compare how the means between the degrees of satisfaction with previous overseas work experience groups differed on cultural adjustment and work adjustment. A Tukey post-hoc comparison of the groups for degree of satisfaction with previous overseas work experience could not be conducted as for both cultural adjustment and work adjustment at least one group had fewer than two cases. Figures 4 and 5 show the mean plots for the

mean differences in cultural adjustment and work adjustment respectively for groupings by degree of satisfaction with previous overseas work experience.



Figure 4. Plot of mean differences of cultural adjustment by degree of satisfaction with previous work experience.

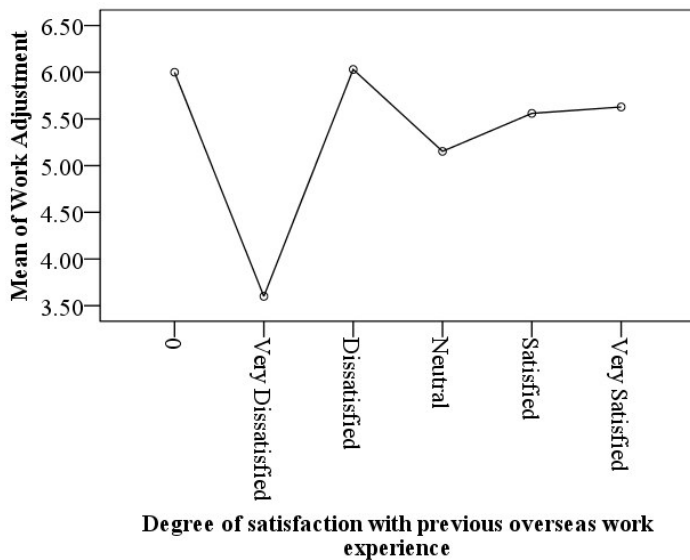


Figure 5. Plot of mean differences of work adjustment by degree of satisfaction with previous work experience.

Length of Employment in Current Job. A one-way ANOVA was used to test for mean differences by the length of employment in current job for each facet of sociocultural adjustment. A significant difference in means was found for cultural adjustment ($F_{3,291} = 5.14, p = .002$), for interaction adjustment ($F_{3,291} = 3.74, p = .012$), and for work adjustment ($F_{3,291} = 5.33, p = .001$). As a significant difference was found between the length of employment in current job on all three facets of adjustment, Tukey HSD tests and mean plots were conducted to compare how the means between lengths of employment on current job differed on each facet of adjustment.

A Tukey post-hoc comparison of length of employment on current job indicate that respondents who have been at their present job for two years or more ($M = 5.64, 95\% CI [5.50, 5.77]$) have significantly higher cultural adjustment levels than those who have been at their present job for one to two years ($M = 5.04, 95\% CI [4.61, 5.47]$), $p = .011$. In addition, the post-hoc results indicate that that respondents who have been at their present job for two years or more ($M = 3.94, 95\% CI [3.67, 4.18]$) have significantly higher interaction adjustment levels than those who have been at their present job for zero to five months ($M = 2.71, 95\% CI [1.84, 3.58]$), $p = .046$. Furthermore, the post-hoc results indicate that that respondents who have been at their present job for two years or more ($M = 5.66, 95\% CI [5.48, 5.84]$) have significantly higher work adjustment levels than those who have been at their present job for six to eleven months ($M = 4.95, 95\% CI [4.44, 5.46]$), $p = .044$, and also than those who have been at their present job for one to two years ($M = 4.93, 95\% CI [4.38, 5.47]$), $p = .023$. Comparisons between the other permutations of length of employment on current job were not statistically significant at $p < .05$. Figures 6, 7, and 8 show the mean plots for the mean differences in cultural

adjustment, interaction adjustment, and work adjustment respectively for the groupings by length of employment on current job.

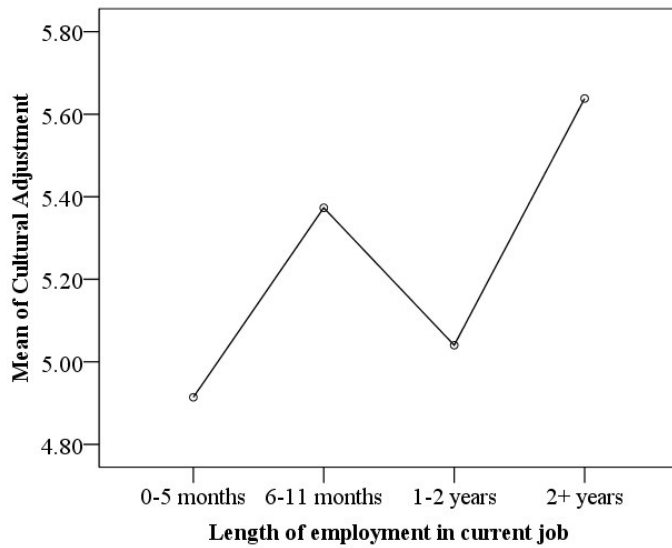


Figure 6. Plot of mean differences of cultural adjustment by length of employment in current job.

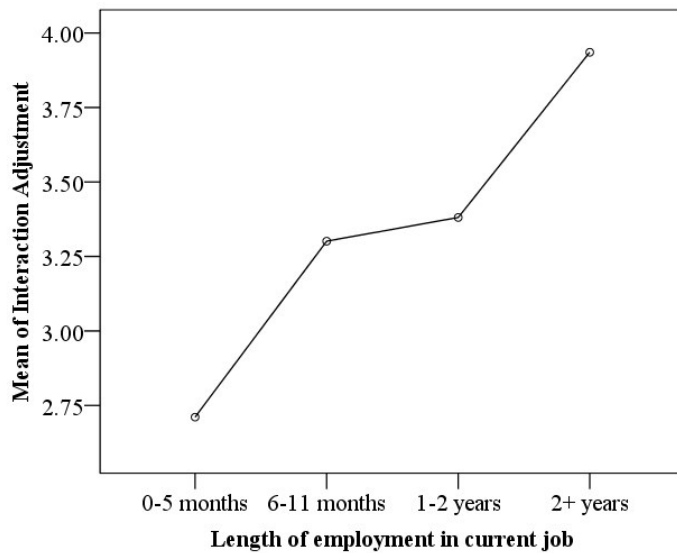


Figure 7. Plot of mean differences of interaction adjustment by length of employment in current job.

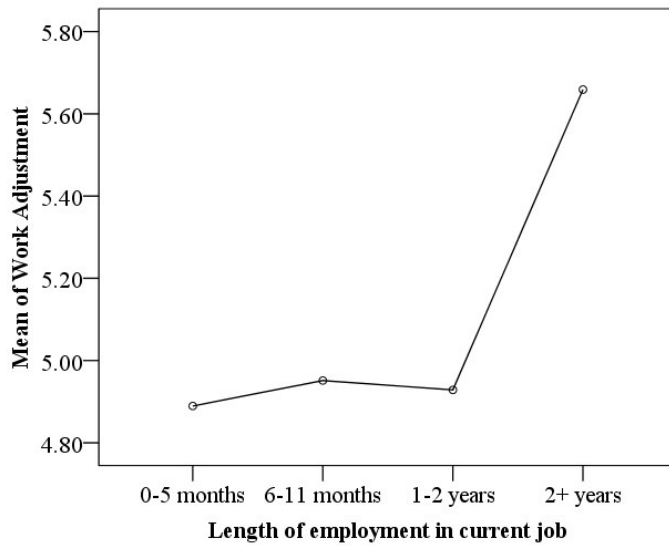


Figure 8. Plot of mean differences of work adjustment by length of employment in current job.

Employing Institution. A one-way ANOVA was used to test for mean differences by the employing institution for each facet of sociocultural adjustment. A significant difference in means was found for cultural adjustment ($F_{8,288} = 3.82, p < .001$), for interaction adjustment ($F_{8,288} = 2.08, p = .038$), and for work adjustment ($F_{8,288} = 3.80, p < .001$). As a significant difference was found between the employing institution on all three facets of adjustment, Tukey HSD tests and mean plots were conducted to compare how the means between the employing institutions differed on each facet of adjustment.

A Tukey post-hoc comparison of employing institutions indicate that respondents at employing institution 05 ($M = 6.12, 95\% CI [5.89, 6.35]$) and at employing institution 09 ($M = 5.91, 95\% CI [5.54, 6.27]$) have significantly higher cultural adjustment levels than those at employing institution 02 ($M = 5.06, 95\% CI [4.74, 5.37]$), $p = .001$ and $p =$

.018, respectively. In addition, respondents at employing institution 05 ($M = 6.12$, 95% $CI [5.89, 6.35]$) also had significantly higher cultural adjustment levels than those at employing institution 08 ($M = 5.04$, 95% $CI [4.52, 5.57]$), $p = .001$. Figure 9 shows the mean plot for the mean differences in cultural adjustment for the employing institutions.

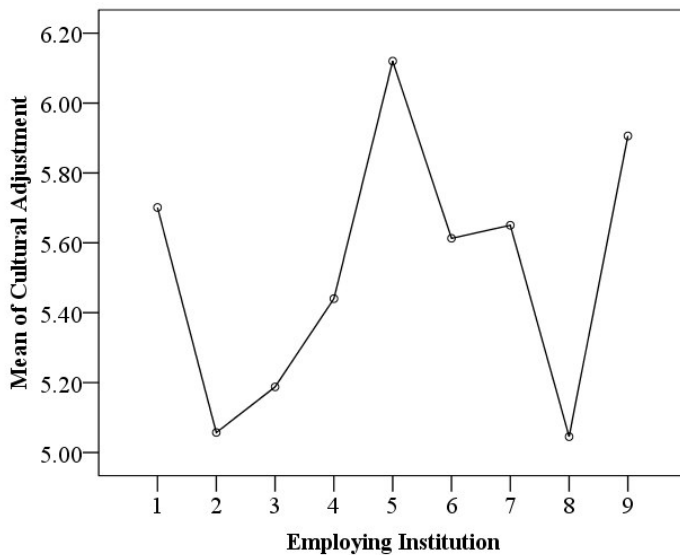


Figure 9. Plot of mean differences of cultural adjustment by employing institution.

The post-hoc results indicate that that respondents at employing institution 05 ($M = 6.04$, 95% $CI [5.61, 6.48]$) and employing institution 09 ($M = 6.04$, 95% $CI [5.63, 6.44]$) have significantly higher work adjustment levels than those at employing institution 03 ($M = 4.40$, 95% $CI [3.21, 5.59]$), $p = .017$ and $p = .016$ respectively, and employing institution 07 ($M = 4.91$, 95% $CI [4.41, 5.40]$), $p = .046$ and $p = .042$ respectively. In addition, respondents at employing institution 06 ($M = 5.80$, 95% $CI [5.43, 6.16]$) also have significantly higher work adjustment levels than those at employing institution 03 ($M = 4.40$, 95% $CI [3.21, 5.59]$), $p = .031$. Comparisons between the other permutations of employing institutions, including all for interaction

adjustment, were not statistically significant at $p < .05$. Figure 10 shows the mean plot for the mean differences in work adjustment for the employing institutions.

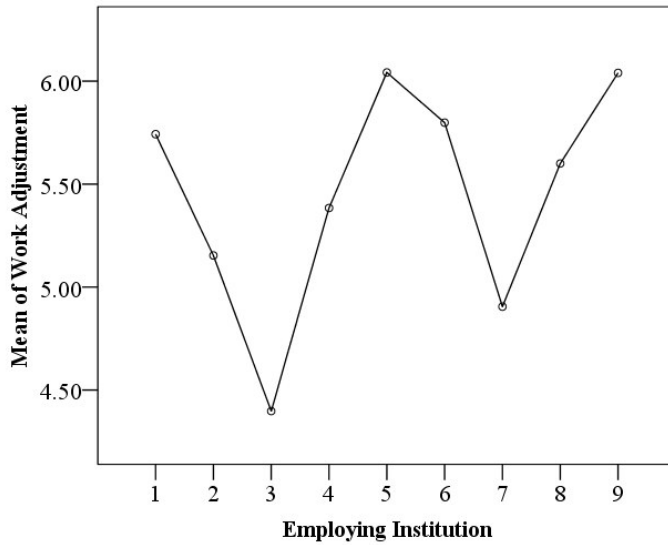


Figure 10. Plot of mean differences of work adjustment by employing institution.

Location by City. A one-way ANOVA was used to test for mean differences by the specific city for each facet of sociocultural adjustment. A significant difference in means was found for cultural adjustment ($F_{3,293} = 5.22, p = .002$), for interaction adjustment ($F_{3,293} = 2.67, p = .048$), and for work adjustment ($F_{3,293} = 7.96, p < .001$). As a significant difference was found between the location by city on all three facets of adjustment, Tukey HSD tests and mean plots were conducted to compare how the means between the individual cities differed on each facet of adjustment.

A Tukey post-hoc comparison of the individual cities indicates that respondents living in the city of Dubai ($M = 5.71, 95\% CI [5.53, 5.89]$) have significantly higher cultural adjustment levels than those living in the city of Abu Dhabi ($M = 5.20, 95\% CI [4.98, 5.41]$), $p = .002$. In addition, respondents living in the city of Dubai ($M = 5.88,$

95% CI [5.66, 6.09]) also had significantly higher work adjustment levels than those living in the city of Abu Dhabi ($M = 5.14$, 95% CI [4.85, 5.43]), $p < .001$ and than those living in the city of Sharjah ($M = 4.91$, 95% CI [4.41, 5.40]), $p = .001$. Comparisons between the other permutations of individual cities, including all for interaction adjustment, were not statistically significant at $p < .05$. Figures 11 and 12 show the mean plots for the mean differences in both cultural adjustment and work adjustment for the individual cities.

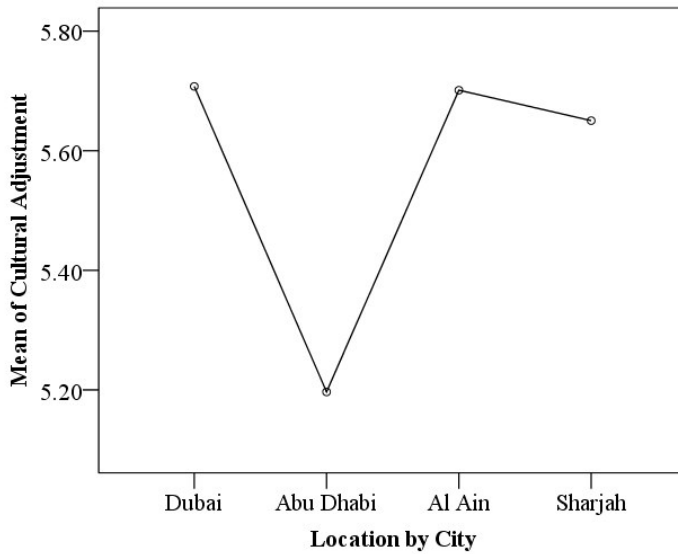


Figure 11. Plot of mean differences of cultural adjustment by city.

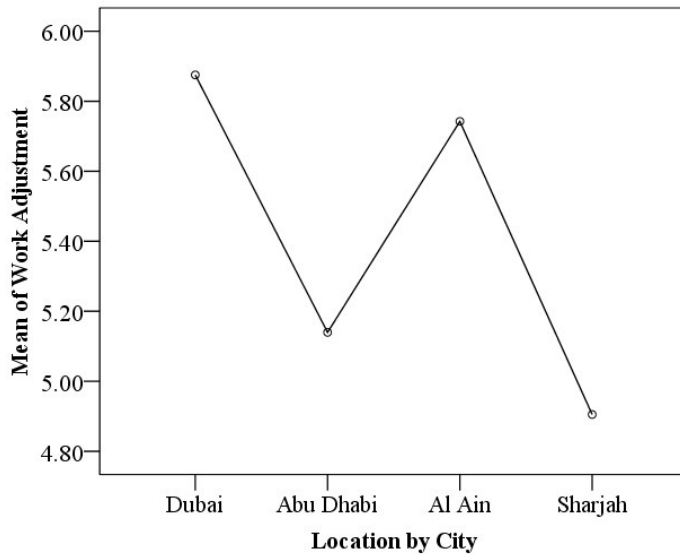


Figure 12. Plot of mean differences of work adjustment by city.

Summary

This chapter presented the statistical analysis and interpretation of the quantitative data collected during this study. A sample population of academic expatriates working in the UAE was surveyed to determine what factors might be influential on their sociocultural adjustment experiences. Descriptive statistics of the demographics of this sample were discussed. The survey used in this study was analyzed as to its reliability, and the data set was examined to ensure its efficacy for subsequent parametric hypothesis testing. Hypothesis testing was conducted on the aggregated data set, and exploratory analysis was conducted on both the aggregated data set as well as by individual research site. Each test was presented with the associated statistical analysis.

An analysis of the data indicated that three of the nine alternative hypotheses were fully supported, and an additional two alternative hypotheses were partially supported.

No significant relationships were found between the independent variables of foreign language ability and the three dependent variables of cultural adjustment, interaction adjustment, and work adjustment. While no significant relationships were found between previous overseas work experience and the three facets of sociocultural adjustment when this independent variable was measured quantitatively, a qualitative measuring the degree of satisfaction with previous overseas work experience(s) showed significant positive relationships with cultural adjustment and work adjustment. Significant negative but weak relationships were found between the independent variable culture novelty and all three facets of sociocultural adjustment. The results of the hypotheses tests and the previously mentioned descriptive statistics for the sample demographics are used in chapter 5 to answer Research Questions 1 and 2.

Exploratory analysis of the data indicated that some of the control variables could also be influential on the three facets of sociocultural adjustment. Regression models indicated that the variables of gender, degree of satisfaction with previous overseas work experience, length of employment in current job, and location by city were statistically significant predictor variables on sociocultural adjustment. Furthermore, analysis of the results of one-way ANOVA testing indicated that significant differences existed between the means of subgroups of several control variables on all three facets of sociocultural adjustment. Significant differences were found for groupings of age, highest degree earned, degree of satisfaction with previous overseas experience, length of employment in current job, employing institution, and location by city. The results of the exploratory analysis provide rich material as a basis for examining Research Question 3, and the

implications of these and the other results presented in this chapter are discussed further in chapter 5.

CHAPTER 5. DISCUSSION, IMPLICATIONS, RECOMMENDATIONS

This study explored the influence of selected antecedent and in-country factors from the Black et al. (1991) model on the cultural, interaction, and work adjustment levels as self-reported by academic SIEs working in the United Arab Emirates. Once the influence of these factors was determined through statistical testing, the results were then compared with the existing data regarding the influence of these same factors on traditional expatriate adjustment. This comparison, along with additional exploratory data analysis conducted in the previous chapter, provided insights as to the applicability of the Black et al. (1991) model in describing those factors which affect SIE adjustment during international work experiences. This chapter discusses these findings in detail, as well as the resultant theoretical and practical implications, and then concludes with recommendations for future research.

Research Questions

Research Question 1

The first research question asked by this study was as follows:

1. How influential are the anticipatory factors of previous overseas work experience and foreign language ability and the in-country factor of culture novelty on successful SIE cultural, interaction, and work adjustment?

Nine alternative hypotheses were tested in this study in order to answer this first research question. Previous overseas work experience and foreign language ability were hypothesized to have a positive relationship with all three facets of sociocultural

adjustment for this population of SIEs, and culture novelty was hypothesized to have a negative relationship with all three facets of sociocultural adjustment. Each independent variable will be discussed separately.

Previous Overseas Work Experience. No relationships were found between this factor and any of the facets of sociocultural adjustment when it was measured quantitatively. In other words, there was no significant relationship between how many previous overseas work experiences respondents had held and their levels of sociocultural adjustment. However, when a qualitative measure of previous overseas work experience (that of the degree of satisfaction felt with previous overseas work experience(s), if any) was used, significant positive relationships emerged between previous overseas work experience and two facets of adjustment: cultural and work. It is important to note that this qualitative measurement was only through the use of one item on the survey instrument and so, therefore, no conclusions can be made as to a relationship between the construct of satisfaction with previous overseas work experience and sociocultural adjustment. However, this finding does support Black et al.'s (1991) contention that while "quantity of previous overseas experience does not seem to necessarily relate to current overseas adjustment . . . [o]verall, though, previous overseas experience does seem to facilitate the adjustment process" (p. 294).

Foreign Language Ability. No significant relationships were found between the independent variable of foreign language ability and any of the three facets of sociocultural adjustment. A likely explanation for this lack of relationships could be from the unique linguistic and communication environment of the UAE. As discussed in chapter 2, it is very common for expatriates in the UAE to be able to function perfectly

well on a day-to-day basis with little to no knowledge of Arabic, given the diverse population makeup and structure which has resulted in English being a *lingua franca* for the country. In addition, at the higher education institutions where the study population is employed, almost all teaching is conducted in English. Therefore, the academic SIEs in this study would not have been required to learn a foreign language for work purposes. It was discussed, however, that the act of learning a foreign language provides greater insight and knowledge into a different culture, and that this experience itself could help to ease adjustment for the SIE in that he or she would have previous practice with operating in a different cultural mindset. The results of this study, however, seem to indicate that this underlying gain of foreign language learning is not linked to sociocultural adjustment for this population of SIEs.

Culture Novelty. Significant negative relationships were found between the in-country factor of culture novelty and all three facets of sociocultural adjustment. Although both Black et al. (1991) and Bhaskar-Shrinivas et al. (2005) held that culture novelty would mainly influence cultural and interaction adjustment, based on the assumption that “parent company policies are assumed to carry the main influences for expatriates’ work environments” (Bhaskar-Shrinivas et al., 2005, p. 261), for this population of SIEs, culture novelty also plays a role in work adjustment. It can be argued that since the employing organizations of these academic expatriates are in no way linked to any “parent” company in a home country, they likely reflect much of the non-work cultural milieu of the host country—thus providing some explanation as to why adjustment to the cultural non-work environment would have an impact on the work environment as well.

Research Question 2

The second research question asked in this study was as follows:

2. How does the influence of these selected factors of SIE adjustment compare with their reported influence on successful traditional expatriate cultural, interaction, and work adjustment?

Previous Overseas Work Experience. Black et al. (1991) originally proposed that in terms of this factor, previous work-related experiences would influence work adjustment and non-work related experiences would influence cultural and interaction adjustment. Subsequent empirical research reviewed in this study (Bhaskar-Shrinivas et al., 2005; Black, 1988; Hechanova et al., 2003; Shaffer et al., 1999) provide conflicting evidence whether previous overseas work experience, when measured quantitatively, has significant positive relationships with the three facets of adjustment. In general, these studies report the strongest relationship for this factor with interaction adjustment, although the results are varied as to some support for a relationship to no relationships found between this factor and any of the facets of adjustment. The present study, however, found that for the surveyed SIEs, no significant relationships existed between the number of previous overseas work experiences and any facet of sociocultural adjustment. As the majority of SIEs in this study had multiple previous overseas work experiences, it could be stated that being an SIE is a total lifestyle adoption as opposed to experiencing a defined, time-bound step on the career path of a traditional expatriate. The state of simply having had previous overseas work experiences for SIEs, therefore, could, in effect, become as insignificant as other realities perceived to be a normal part of life. Conversely, significant relationships were found for cultural and work adjustment

when previous overseas work experience was qualitatively measured. So while the existence of previous overseas work experience is insignificant on the adjustment of SIEs, the quality of those previous experiences does matter. There appears, then, to be a possible difference between traditional expatriates and SIEs in terms of the influence of this factor on sociocultural adjustment.

Foreign Language Ability. There is robust empirical support regarding the positive influence of foreign language ability on all three facets of sociocultural adjustment among traditional expatriates (Bhaskar-Shrinivas et al., 2005; Hechanova et al., 2003; Shaffer et al., 1999; Takeuchi et al., 2002). In particular, this factor seems to be most influential on interaction adjustment and work adjustment. However, no support for any relationship between foreign language ability and any facet of sociocultural adjustment was found in this study of SIEs. Although at first glance this difference in findings would suggest a salient difference between these two groups of expatriates, further exploration would be needed to determine the following possible explanations: a) if this difference is inherent in the sociocultural adjustment experiences of the different types of expatriates themselves; b) if the difference stems from the unique language and communication situation of the United Arab Emirates; or c) if the communication environments of the UAE, in general, and of the work sites for this study's population of SIEs, in particular, echo findings reported by Bhaskar-Shrinivas et al. (2005) in that foreign language ability shows a stronger effect for non-native English speaking expatriates in an English-medium country rather than the reverse.

Culture Novelty. Although Black et al. (1991) originally proposed that the in-country factor of culture novelty would have a negative influence on the degree of

cultural and interaction adjustment, subsequent empirical research on traditional expatriates (Bhaskar-Shrinivas et al., 2005; Hechanova et al., 2003; Shaffer et al., 1999; Takeuchi et al., 2002) has found that this factor has routinely exhibited a negative relationship with all three facets of adjustment. In general, for traditional expatriates, culture novelty is most strongly related to cultural adjustment, followed by interaction adjustment, and then by work adjustment. The findings of the present study on SIEs echo these results; for this group of academic expatriates, culture novelty was most strongly associated with cultural adjustment, marginally less so for interaction adjustment, and more weakly with work adjustment. Additionally, as mentioned earlier in this study, the influence of culture novelty has been studied quantitatively once before (Selmer & Luring, 2009) on academic SIEs, and the reported results closely mirror the findings of this study, despite that study being conducted in a different geographical region. This factor, then, seems to affect both traditional expatriates and SIEs very similarly.

Research Question 3

The third research question asked in this study is as follows:

3. What insight does this comparison provide into the applicability of the Black et al. (1991) expatriate adjustment model to explain SIE cultural, interaction, and work adjustment?

Reynolds (2005) first theorized that some of the factors found on the Black et al. (1991) model of expatriate sociocultural adjustment may shift in importance when the model is used to describe the sociocultural adjustment experiences of SIEs. The results of this study support that theory. For example, although foreign language ability has been empirically shown to be a significant anticipatory factor of influence on traditional

expatriate adjustment, in the current study no influence was found. This could indicate that this factor assumes influence situationally, depending on the linguistic and communication context of both the host country and the host work environment.

In addition, it could perhaps be useful to reshape the anticipatory factor of previous overseas work experience. Studies into traditional expatriate adjustment have treated this factor in terms of how many previous experiences were held; however, for the group of SIEs in this study, this quantitative value had no correlation with sociocultural adjustment. Influence was only found when this factor was examined in terms of the qualitative nature of those previous experiences. More specifically, this study shows that while unsurprisingly, high levels of reported dissatisfaction with previous overseas work experiences correlated to a low degree of cultural and work adjustment, and that the degree of these two facets of adjustment increased as the reported levels of satisfaction increased, those SIEs which reported being simply 'dissatisfied' actually had the highest degrees of adjustment of the entire group. The cause of this spike is not immediately apparent and would certainly require further investigation. As this qualitative perspective of previous overseas experience has not been empirically examined before with traditional expatriates, it is, at this point, impossible to say if a revised definition of the factor previous overseas work experience on the Black et al. (1991) model would only be significant for SIE adjustment. However, it does lend support for the need to reevaluate how this factor is operationalized.

The substantial similarity of culture novelty influence on all three facets of sociocultural adjustment between both traditional expatriates and the SIEs in this study indicates that the supposed generalizability of this in-country factor is supported. In other

words, despite differences between these two groups of expatriates, there are commonalities to be found when comparing their sociocultural adjustment experiences; the influence of culture novelty having the same strength and pattern of influence on the three facets of adjustment for both of these groups is a strong indicator of such common ground.

Further insights into the applicability of the Black et al. (1991) model.

Although the third research question spoke to the insight gained from the comparison of the hypothesis testing of this study with previously reported research on traditional expatriates, additional exploratory analysis in this study provides further insights into the applicability of the Black et al. (1991) model, in its current form, in explaining the sociocultural adjustment experiences of SIEs. For example, regression analysis conducted on the control variables in this study indicates that, besides the factors tested as independent variables in this study, other factors such as gender and length of employment in current job also have an influence on the sociocultural experiences of SIEs.

Moreover, an examination of mean differences in the degree of adjustment for this group of SIEs indicates that education level, age, specific city location, and even specific employing institution all have some effect on adjustment as well. While the control factors of specific city location and specific employing institution can be subsumed under the traditional model factors of culture novelty and organizational factors of culture and socialization, education level and age are individual factors which are not currently included in the Black et al. (1991) model. As previous research on traditional expatriates provides some support for the influence of individual factors such

as age (Church, 1982; Hechanova et al., 2003; Stahl & Caligiuri, 2005), a possibility exists that the Black et al. model as it is currently formulated might need to be expanded by the inclusion of other anticipatory individual factors.

An examination of the mean differences of age groupings in this study, for example, indicates that the degree of cultural adjustment is much higher after the age of 40 than for the lower age brackets, with this difference becoming statistically significant after the age of 50. The possible inclusion of this individual factor on the Black et al. (1991) model would need to be considered carefully, however, as it would need to be understood what the factor of age really represents. Is it the accumulated wisdom and experience that comes with age that is the influential aspect, for example, or, perhaps, are there different motivations for expatriating that can be associated with different age levels, or different stages in career paths?

Additionally, education level shows a significant influence in the degree of cultural adjustment in this study. More specifically, those SIEs who reported holding a Master's or higher level degree had higher levels of cultural adjustment than those holding a Bachelor's degree. If this factor was to be included in the Black et al. (1991) model, it would have to be determined if it would stand on its own as an individual factor. For example, higher levels of education could indicate greater experience with the higher-levels of reasoning that come with graduate study, and so these greater meta-analytic capabilities could aid in making sense of the new cultural environment. Another possible explanation could be that the obtainment of graduate level education indicates a deeper and more sophisticated professional skill set that would promote greater

professional self-assurance, thus increasing the expatriate's self-worth and self-confidence in dealing with unfamiliar environments.

Furthermore, the results of the mean differences in the degree of cultural, interaction, and work adjustment when compared by length of current employment indicate that sociocultural adjustment may not be as rigidly linear as is described by the Black et al. (1991) model. Although Black and Mendenhall (1991) describe expatriate sociocultural adjustment as following a U-shaped curve over time, and subsequent analysis by Bhaskar-Shrinivas et al. (2005) has modified that shape into one more resembling a sideways S pattern, the results of this study indicate that each facet of adjustment could have a distinct trajectory pattern. This study, for example, indicates that the trajectory of cultural adjustment follows the sideways S pattern as described by Bhaskar-Shrinivas et al. The degree of interaction adjustment, however, generally follows an increasingly positive correlation with length of employment and there appears to be little change in the degree of work adjustment until about the two year mark, when the degree of work adjustment significantly jumps to a much higher level. Although the construct of time in the international work experience is not included in the Black et al. model, the difference between its trajectory, as explained so far for traditional expatriate adjustment, and its trajectories for the group of SIEs in this study could indicate differences significant enough that the factor of time might be included as an in-country factor.

General Discussion and Theoretical Implications

Demographic data collected in this study supports the findings by Suutari and Brewster (2000) and Jokinen et al. (2008) that SIEs differ significantly from traditional expatriates in terms of individual characteristics. As both of these studies reported higher percentages of females among SIEs than in traditional expatriates, so too this result was found in the current study, as females actually were the slight majority of the surveyed SIE population. In addition, as reported in Suutari and Brewster's study of Finnish engineers, a large amount of SIE spouses were not only resident in the host country but were also employed. Indeed, for this study, it was found that almost seventy percent of resident spouses were employed. This phenomenon lends credence to both Reynolds' (2005) supposition that SIEs tend to make decisions about moving overseas jointly with the spouse instead of following the pattern of the "trailing-spouse" as reported in the literature on traditional expatriates, as well as Richardson's (2006) finding that the SIEs in her study were partly motivated to expatriate because they wished to expose the family to new cultures and experiences.

Interestingly, overall the SIEs in the current study were older than those in the Suutari and Brewster (2000) and Jokinen et al. (2008) studies. However, as the SIEs in this current study also reported having significantly more previous overseas work experiences than in the two previous SIE studies, the combination of these two factors could indicate that the SIEs that participated in this current study had either chosen or were further along in a continual self-initiated expatriate career path than the previously studied SIEs. The SIEs in the Suutari and Brewster study indicated motivations of interest in internationalization and a poor employment situation in the home country as

reasons to expatriate; it would be interesting to explore if those motivations remain as strong for SIEs who have continued to remain overseas in the later stage of their career.

The findings of this study do provide further support that many facets of the self-initiated expatriate experience are different enough from that of traditional expatriates that further study is warranted, specifically on this subpopulation of expatriates.

Tentatively, it appears that a greater variance exists not only in individual characteristics of SIEs but also in how those characteristics play a role in the sociocultural adjustment experiences of SIEs. Although there is now evidence directly from the present study, and indirectly from Selmer and Luring (2009), that the Black et al. (1991) model of sociocultural adjustment can explain some of the adjustment experiences of SIEs, particularly the significance of the in-country factor culture novelty, many questions remain. For example, as this study did not test the model in its entirety, other factors currently included in the model could go further in explaining SIE sociocultural adjustment. However, this study does provide evidence that, perhaps, the model should include further factors, and/or perhaps, additional layers of quality of factors and time should be added. These layers could be useful not only in explaining SIE adjustment but also in lending greater explanation to traditional expatriate adjustment experiences.

Practical Implications

This study provides insight into some measures that can be taken by HR managers and practitioners in foreign organizations that hire from the SIE labor pool. First, during the recruitment and selection phase, attention should be given to some individual characteristics of the applicant. For example, this study provides evidence that an older

SIE at mid-career point, with a higher education level, and who has reported a higher degree of satisfaction with previous overseas work experiences will have higher degrees of sociocultural adjustment. In the UAE, there are no employment laws prohibiting the collection of personal application information such as gender, age, or marital status. Indeed, these characteristics are routinely determined during the recruitment process. Therefore, selection committees could focus more effort on those applicants that display these demographic characteristics. In addition, during the interview process, applicants could be queried as to the quality of their previous overseas work experiences, what they enjoyed best about those experiences, as well as how those experiences shaped their decision to continue to follow an SIE career path.

Furthermore, once the SIE becomes an employee, organizational support will be critical during the first year of the employment contract. This study reports that the first five months are a critical period in terms of low levels of interaction adjustment, whereas work adjustment remains low during the first year. Therefore, the employing organization should put in place not only initial orientation and on-boarding processes and programs at the beginning of the employment period, but also continuing aid in the adjustment of the employee by providing an ongoing mentoring program led by employees who have been with the organization for at least two years. This suggestion is supported by the work of Bozionelos (2009), who also found that ongoing mentoring aided in greater adjustment than just the presence of an initial on-boarding component of the induction process.

Limitations and Recommendations for Future Research

The findings of this exploratory study are important as they add to the body of knowledge of the little-studied subpopulation of self-initiating expatriates. However, for as much new information was revealed by this study, a next stage of research is needed. Not only will further research be needed to determine how many of the results of this study are applicable only locally to SIEs in the UAE but also the research questions which have been asked in this study should be replicated with SIE groups in different geographical locations and in different employment categories and organizations. This would be particularly salient in testing for relationships between foreign language ability and the three facets of sociocultural adjustment. This factor's influence, or lack thereof, will only be confirmed when examined in a multitude of different linguistic and communication environments. In addition, these results lead to further research questions that should be explored.

From the perspective of testing the Black et al. (1991) model of sociocultural adjustment, the factors included in the model, but not tested in this current study, need to be examined to discover if their influence is comparable to that which has been reported for traditional expatriate adjustment. In addition, factors which are currently not included on the Black et al. model could be tested to see if inclusion would be warranted. Some of these factors could include age, education level, and motivation. Furthermore, some of the factors currently included in the Black et al. model could be studied through a refashioning of how those factors are defined. More specifically, as most factors in the model have been traditionally measured through quantity, an additional layer of quality

should be embedded into each factor. In particular, the factor of previous overseas work experience should be operationalized through more qualitative descriptions.

It would also be useful to continue research into the implications of time to adjustment on the three different facets to understand if the trajectory of time to adjustment should be treated as a separate construct or if its effect could be treated similarly to factors included on the sociocultural adjustment model. In addition, more research should be conducted to determine if time as a construct can be examined in relationship to an aggregate construct of sociocultural adjustment, or if it plays a more significant role when examined through each facet of adjustment separately. There are indicators from this study that the construct of time could not only play a role of influence on the facets of sociocultural adjustment but also could display variance when linked with other factors of age, motivation, and stage of career.

Conclusion

This study set out to enrich the body of expatriate management literature by investigating the sociocultural adjustment experiences of the little-researched subpopulation of expatriates termed SIEs. Through a quantitative research design, results were obtained that revealed new information about the adjustment experiences of SIEs. Despite the limitations of this study, the findings herein indeed have provided a new lens through which a vanguard topic of expatriate management literature may be examined. These findings lay a foundation upon which broader theoretical study should be built and subsequent practical applications for organizations that seek to hire SIEs may be based.

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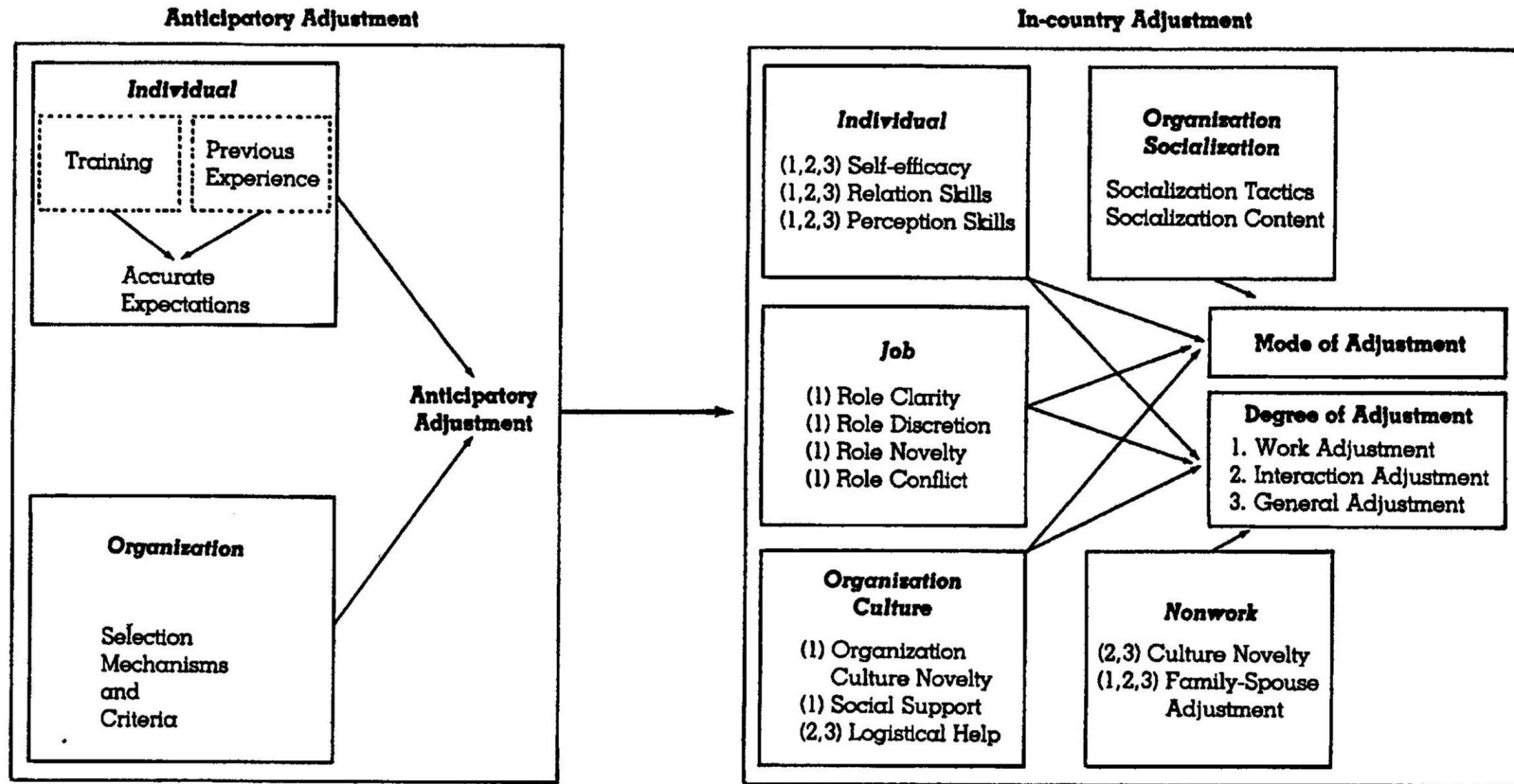
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APPENDIX A. THE BLACK ET AL. (1991) MODEL OF EXPATRIATE ADJUSTMENT

Framework of International Adjustment^a



^a Numbers in parentheses indicate the numbered facet(s) of adjustment to which the specific variable is expected to relate.

Adapted from "Toward a comprehensive model of international adjustment: An integration of multiple theoretical perspectives," by J. S. Black, M. Mendenhall, and G. Oddou, 1991, *Academy of Management Review*, 16(2), p. 303. Copyright 1991 by Academy of Management Review. Reprinted with permission.

APPENDIX B. SURVEY INSTRUMENT

Please rate the following statements based on your experiences living and working in the UAE. Provide only one response to each statement. There are no right or wrong responses. Do not spend too much time on any one statement; rather please choose your responses based on your initial reaction to the statement.

Please indicate your adjustment status related to each item statement below. Select the rating scale point that best describes how you feel. If an item below does not apply to you, please select "N/A".

	Very Unadjusted 1	2	3	4	5	6	Very Adjusted 7	N/A
Living conditions in general								
Housing conditions								
Food								
Shopping								
Cost of living								
Entertainment/recreation facilities & opportunities								
Health care facilities								
Socializing with UAE nationals								
Interacting with UAE nationals on a day-to-day basis								
Interacting with UAE nationals outside of work								
My specific job responsibilities								
Performance standards and expectations of my job								
My supervisory responsibilities								

Please indicate your assessment of the similarities or differences in the following items in the UAE when compared to your home country. Select the rating scale point that best describes how you feel.

	Very Different 1	2	3	4	Very Similar 5
Everyday customs that must be followed					
General living conditions					
Using health care facilities					
Transportation systems used in the UAE					
General living costs					
Available quality and types of foods					
Climate					
General housing conditions					

Demographics

Please answer each of the following questions.

Please indicate your gender:

- a. Male
- b. Female

Please indicate your age category:

- a. 20-30
- b. 31-40
- c. 41-50
- d. 51-60
- e. 61+

What is the highest degree you have earned?

- a. Doctorate (Ph.D., D.Phil, Ed.D., D.Sc., D.B.A., etc)
- b. Professional Doctorate (M.D., J.D., etc)
- c. Master's (M.A., M.Sc., M.Phil., M.Ed., M.B.A., etc)
- d. Bachelor's (B.A., B.Sc., B.Ed., B.Comm., etc)
- e. Other

Are you married?

- a. Yes
- b. No

If you are married, is your spouse also resident in the UAE?

- a. Yes
- b. No
- c. N/A

If your spouse is resident in the UAE, is he/she employed?

- a. My spouse works full time in the UAE.
- b. My spouse works part time in the UAE.
- c. My spouse is not employed.
- d. N/A

What is your nationality according to your passport? _____

How many previous teaching jobs have you held outside of your home country?

- a. 0
- b. 1
- c. 2
- d. 3+

If you have had previous jobs outside of your home country, overall how satisfying were those experiences?

	Very Dissatisfied 1	2	3	4	Very Satisfied 5	N/A
Overall degree of satisfaction with my previous job(s) outside of my home country.						

How long have you been working for your current employer?

- 0-5 months
- 6-11 months
- 1-2 years
- More than 2 years

In how many foreign languages are you at a conversational level of fluency or higher?

For the purposes of this question, a conversational level of fluency is defined as the ability to have relatively complex conversations about a range of topics (particularly those which hold personal interest), to guess the meaning of unknown words through context, and to communicate effectively with native speakers.

- 0
- 1
- 2
- 3+

This is the end of the survey. Thank you again for your participation. Please click on the SUBMIT button below to record your responses.

APPENDIX C. FULL LISTING OF PARTICIPANT NATIONALITIES

1. Australia
2. Bangladesh
3. Brazil
4. Canada
5. Egypt
6. France
7. Germany
8. India
9. Iran
10. Iraq
11. Ireland
12. Jordan
13. Lebanon
14. Namibia
15. New Zealand
16. Pakistan
17. Palestine
18. Poland
19. South Africa
20. Sudan
21. Syria
22. The Netherlands
23. Tunisia
24. Turkey
25. U.K.
26. U.S.A.