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## 影響外派人員自我調整、能力發展及服務績效之相關因素 研究 研究成果報告(精簡版)

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## 摘 要

企業國際化的結果導致越來越多員工必須外派至海外工作，而由於多國籍企業海外子公司運作之複雜度相當高，外派人員能否成功扮演控制者、協調者及知識傳遞者的角色，實為多國籍企業海外子公司經營成敗之關鍵。因此外派人員之訓練與自我調整已成為國際人力資源管理之重要因素。雖然此一議題在過去已有想當多的研究，然而有關影響外派人員自我調整、作業能力及服務績效之前置變數與干擾變數卻少有研究進行有系統的評估，本研究之目的在於探討外派人員之個人特質，外派任務複雜度及跨文化差異對於外派人員調整、能力及績效之影響，並進一步探討外派人員之訓練與社會支持對於以上變數之干擾效果。

透過一系列之文獻探討，本研究發展八個研究假設作為實證研究之依據，本研究是以台商之多國籍派駐在亞洲之外派人員作為樣本，並以問卷調查之方式收集資料。本研究總計發出 900 份問卷，回收 218 份有效問卷。研究結果顯示外派人員之能力，任務指派及文化之差異對於外派人員之自我調整、作業能力及外派績效有顯著的影響。同時外派人員若能接受必要之跨文化訓練及得到公司、主管及配偶之支持，會促進外派人員達到更好的自我調整，更高的作業能力及發揮更好的外派績效。由於過去之外派研究多半沒有將相關之影響變數及干擾變數同時納入一個比較完整的研究架構中，本研究之結果應可提供後續學者作為進一步發展相關理論之參考，也可作為業界經理人員招募、訓練，及管理外派人員之依據。

關鍵字：外派任務指派、外派人員調整、外派人員能力、外派績效

## ABSTRACT

The internationalization of business activity has led a significant increase in expatriates who are living and working overseas. The importance of expatriates in the complexity of multinational operations is now widely recognized. Expatriates play “central roles” as controllers, coordinators and knowledge transferors within multinational firms. Given that expatriates have to face on many challenges, the training and adjustment issues of expatriates have been the major concerns of international human resource management. Although these two research issues have been evaluated by plenty of scholars, many of them do not integrate relevant antecedents into a more comprehensive research model. There is still a need for theoretically based empirical research. The purpose of this study is to evaluate the influence of expatriate characteristics, complexity of expatriate task assignment, and perceived cross-cultural differences on expatriate adjustment, capability and effectiveness. The moderating effects of expatriate training and social support on expatriate adjustment are also evaluated.

Through a series of literature review, eight hypotheses are developed in this study and ready for further empirical validation. Questionnaire surveys were conducted to obtain data from the opinions of Taiwanese MNC expatriates dispatching to Asia countries. Quantitative data were used to test the research hypotheses. Among 900 sample expatriates, 218 questionnaires were effective. The empirical results indicated that the levels of expatriates competence and adaptability, the challenges of expatriate’s assignments, and the cross-cultural differences between host country and home country all have significant influences on expatriates overseas adjustment, operational capability, and expatriation performance. Furthermore, expatriates who have taken sufficient departure cross-cultural training and receive enough supports from the organization, the leadership and the spouse can accelerate their achievements on expatriate adjustment, operational capability and expatriation performance. Since most of previous studies do not integrate relevant antecedents and moderating variables of expatriate adjustment and expatriate effectiveness into a comprehensive framework, the research model as developed in this study should provide meaningful implications for academic to develop further theoretical extension and for practitioners to their expatriation recruitment and management.

Keywords: Expatriate task assignment, Expatriate adjustment, Expatriate capability, Expatriate effectiveness

# I. Introduction

## 1.1. Research Background and Motivation

Internationalization of business activities has become one of the most prevalent phenomena for current business operations (Hodgetts & Luthans, 2000). The importance of expatriates in the complexity of multinational operation is now widely recognized. It is argued that, in many multinational companies, international experience has become the requisite for higher level management positions, but there is a lack of competently trained multinational company managers (Suutari & Burch, 2001).

According to Gregersen, Morrison, and Black (1998), “of the U.S. Fortune 500 firms we surveyed, 85 percent do not think they have an adequate number of global leaders; 67% of the firms think that their existing leaders need additional skills and knowledge before they meet or exceed needed capabilities” (p.22). Thus, the globalization of business activities has forced firms to develop more qualified expatriates. Expatriates play “control roles” as controllers, coordinators, and knowledge transferors within multinational firms. Harvey and Novicevic (2001) suggested that effective expatriates should be able to capture the dynamic environment of the host country and to integrate the tacit knowledge of the host company. Expatriates who are not familiar with the culture of the host country are often not living happily and consequently not successful in the subsidiary company (Webb, 1996). Suutari and Busrh (2001) contended that as expatriates dispatching to the host country serve subsidiary firms, any kind of under performance on international assignments can be extremely costly. Copeland and Griggs (1985) estimated that the costs of a failed expatriate may be between US \$50,000 to US \$150,000 for an American expatriate. Maria, Sandy, and Renata (2001) contended that there were more than 250,000 American overseas assignments (expatriates) and the average one-time cost to relocate an expatriate is US\$60,000.

While the importance of expatriates in the complexity of multinational operations is widely recognized, many MNCs do not feel they have adequate and enough expatriates (Suutari & Burch, 2001). Several issues deserve further concern. First, the issues of how expatriates adjust to foreign cultures and perform on their jobs have become increasing important (Maria et al., 2001). Two streams of research on expatriate adjustment have evolved in the literature. The first stream focused on understanding the *degree* of psychological comfort with various aspects of the host culture (e.g. Gregersen and Black, 1990). The second stream of research, based primarily on Nicholson’s (1984) work role transition theory (e.g., West, 1987;

West *et al.*, 1987; West and Rushton, 1989), focuses on how individuals change in order to meet the role requirements of a new environment (e.g., Black, 1988, 1990). Although plenty of scholars have paid a lot of attention on the above studies of expatriate adjustment, the studies of antecedents of adjustment have been largely ignored. Specifically, how expatriate's characteristics, expatriate task assignment and other environmental variables influence expatriate adjustment has not uncovered. Thus further theoretical and empirical validations are required. Given the complexity and challenges of expatriates' assignment, training becomes an effective way to promote the competence of expatriates. Cross-cultural training (CCT) has long been regarded as an efficient tool for cross-cultural communication and management (Kim & Ofori-Dankwa, 1995). Activities of cross-cultural training have been evaluated extensively. Tung (1982), after surveying expatriates in Europe, Japan, and the United States, identified six major types of cross-cultural training activities: (a) environmental briefings, (b) cultural orientation, (c) cultural assimilators, (d) language training, (e) sensitivity training, and (f) field experience training. According to a literature review by Black and Mendenhall (1990), nineteen out of 19 studies found a significant relationship between cross-cultural training and interpersonal skills. Sixteen out of 16 studies found a significant relationship between cross-cultural training and cultural sensitivity. Ten out of 10 studies found a significant relationship between cross-cultural training and self-confidence.

It is often assumed that high-performing expatriates at the parent firm will also be high performers in the subsidiaries. However, this assumption only can be verified if these expatriates adjust their working styles to meet the culture of the host nationals. If the expatriates are not able to adapt to the host country culture, the results could be reversed (Suutari & Brewster, 1998; Fish, 1999). Thus, although many recruitment specialists emphasized overseas experience and competence as the key expatriate selection criteria, more and more specialists used cross-cultural capability as the necessary and important criteria for expatriate recruitment (Harris & Kumra, 2000). It has been suggested that high level expatriate experience and relevant skills results in expatriates needing lower level training. The higher the complexity and the position of the job, the higher the levels of cross-cultural training, languages training and management training needed by the expatriates (Black & Mendenhall, 1990). For successful operations in overseas market places, expatriates should have more expertise in language and cross-cultural skills to handle the complexity of management without an abundance of infrastructure support at the overseas location (Harris & Kumra, 2002).

Furthermore, the impact of cross-cultural differences on training has created much con-

troversty. Previous studies have contended that the greater the differences of culture between parent and host country, the greater the demand on the efforts placed on expatriate training. Expatriates with an overseas assignment in a country with a culture that is significantly different from the host country will require higher levels of expatriate training (Kealey & Protheroe, 1996). The review of previous studies concluded that expatriate training is effective in developing skills, facilitating cultural adjustment, and enhancing performance. However, the role of expatriate training on adjustment needs to be further evaluated. This study proposed that expatriate training should play a moderating role between expatriate adjustment and its antecedents (i.e., expatriates characteristics, expatriate's task assignment, and cross-cultural differences). Expatriate adjustment, operational capability and effectiveness will be enhanced if contingency fits between expatriate training and the antecedents.

Finally, organizational support could be very important for expatriate adjustment, operational capability and performance. Social support referred to as the availability of helping relationships and the quality of those relationships. Research on social support has acknowledged that individuals may obtain support from various sources such as organizations, co-workers, supervisors, friends, and families (Caplan, Cobb, French, Harrison, & Pinneau, 1975). Theoretically, we expect support provided by the organization, supervisor, and family to be particularly important to expatriates. Aycan's (1997) model of expatriate acculturation highlighted the important role that organizations play in the acculturation of expatriates. Other scholars have also argued that organizational support may be an important determinant of employees' adjustment following a transfer (Payne, 1980).

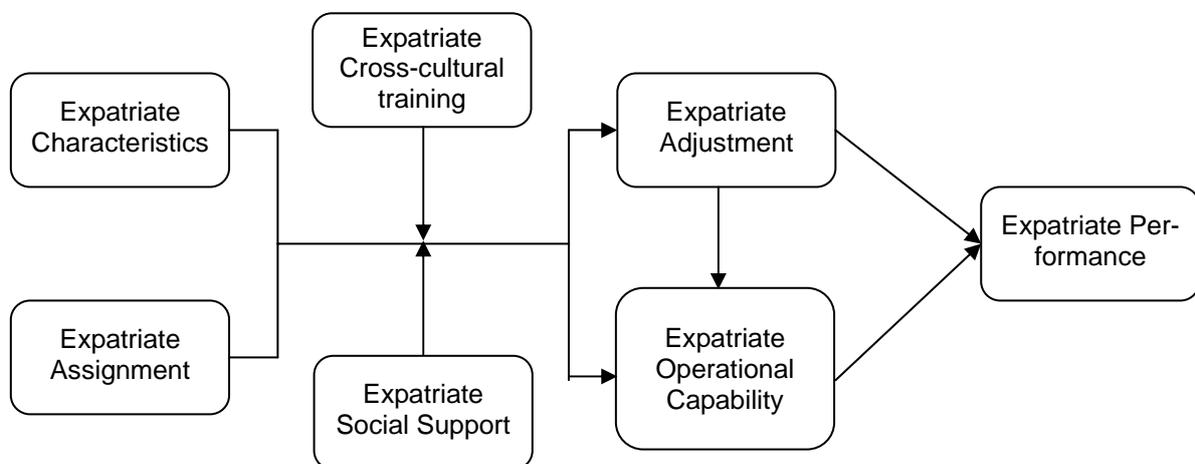
Most of previous studies have indicated that social support would enhance expatriate adjustment. This study intended to go one step further to investigate the moderating effects of social support on expatriate adjustment, expatriate operational capability, and expatriate effectiveness. It is suggested that expatriate adjustment, operational capability and effectiveness will be enhanced if contingency fits between expatriate characteristics, expatriate task assignment, cross-cultural differences and social support are exercised.

## **1.2. Research Objectives**

Since previous studies do not integrate the above constructs into a more comprehensive framework, this study will fill this research gap and develop some research hypotheses for empirical validation. Specifically, the purposes of this study are as follows:

- (1) To evaluate the influences of expatriate characteristics, expatriate task assignments, and cross-cultural differences on expatriate adjustment, expatriate operational capability, and expatriate effectiveness;
- (2) To evaluate the moderating effects of expatriate training and social supports on the following relationships:
  - a. The influence of expatriate characteristics, expatriate task assignment, and cross-cultural difference on expatriate adjustment;
  - b. The influence of expatriate characteristics, expatriate task assignment, and cross-cultural difference on expatriate operational capability;
  - c. The influence of expatriate characteristics, expatriate task assignment, and cross-cultural difference on expatriate effectiveness;
- (3) To evaluate the influence of expatriate adjustment on expatriate operational capability;
- (4) To evaluate the influence of expatriate adjustment and expatriate capability on expatriate effectiveness.

Specifically, the research framework of this study is shown in Figure 1.



**Figure 1. The research framework of this study**

## **II. Literature Review**

### **2.1. Definition of Research Constructs**

#### **2.1.1. Characteristics of Expatriates and Overseas Assignment**

The selection of expatriates has long been a focus issue of research. Early studies attempted to identify personal characteristics of expatriates as the selection criteria for their overseas assignment (Caligiuri, 2000; Fish, 1999; Gregerson, et al, 1998; Harvey & Novicevic, 2001; Spreitzer et al., 1997; Tung, 1981). According to Stone (1991), 10 selection criteria are the key for expatriates: (a) ability to adapt, (b) technical competence, (c) spouse and family adaptability, (d) human relations skill, (e) desire to serve overseas, (f) previous overseas experience, (g) understanding of host country culture, (h) academic qualifications, (i) knowledge of language of the host country, and (j) understanding of home country culture.

Further studies (Behling, 1998; Buss, 1991; Caligiuri, 2000; Hogan, et al., 1996; Ones & Viswesvaran, 1999) have identified the following personality characteristics as key success factors of expatriates: (a) extroversion, (b) agreeableness, (c) conscientiousness, (d) emotional stability, and (e) openness and intellect. In addition to the above personality characteristics, other studies have also identified technical competence, cultural adaptability, previous cultural adjustment, and extensive foreign travel as the characteristics that related to the success of expatriates (Caligiuri, 2000; Gregerson et al., 1998; Spreitzer et al., 1997).

In addition, Stone (1991) also proposed some variables that may cause the failure of expatriates. These variables include family issues, unwillingness to be relocated, dual career issues, commitment to assignment, lack of language capabilities, and inadequate training and compensation program (Harvey & Wiese, 1998; Stone, 1991). Although previous studies have focused efforts on identifying the predictive variables for the success or failure of the expatriate assignment, most are in the conceptual stage of theoretical development. Previous studies did not evaluate how to enhance key success factors and how to eliminate the major failure factors for expatriates through training and communication.

#### **2.1.2. Task Assignment**

Expatriate task assignment is one of major factors that influence expatriate adjustment (Brett & Werbel, 1980; Feldman & Tompson, 1993). Many scholars argue that expatriate task assignment, measured in term of similar task, has relationship with expatriate adjustment

(Yavas & Bodur, 1999a). They further explain that expatriates who are assigned in similar tasks that they have experienced in the parent company before, have less difficulty to adjust. Refer to Naumann (1992) the more similar the composition and functioning of the foreign to the parent, the more positive the expatriate's attitudes are likely to be. In addition, Black (1988) found that role ambiguity, conflict, and work overload, were the key problems of US expatriates in Japan. Thus, the types of task assignment can be represented by the level of expatriates competence on doing abroad assignment are important as the determinant of adjustment and their operational capability and affect the performance level. In addition, the level of host manager's capability where the expatriates assigned also play major role to determine the success of expatriation. It can be assumed that when the expatriate has closer gap with local manager, in terms of capability or competence, the easier to do their assignment than the opposite condition. As controllers or knowledge transferors, the difficulty of pursuing current assignment effectively is likely to be happen when their counterparts has similar level of capability with home country or previous assignment. Therefore, this study asserts that the capability of local partners has effects on the success level of expatriation.

### **2.1.3 Cross-Cultural Differences**

Based on the results of previous studies (Hofstede, 1980, 1994), there are five cultural factors, or values, that are universal for a nation. These values include power distance, uncertainty avoidance, individualism, masculinity, and Confucian dynamic. Power distance is the extent to which less powerful members of institutions and organizations accept that power is distributed unequally (Hodgetts & Luthans, 2000). Countries with people that obey the orders of their superiors are regarded as having high power distance. Previous studies have found that organizations in lower power-distance countries (such as Japan) will be more decentralized and have flatter organizational structures. By contrast, organizations in higher power-distance countries (such as the United States) will be more centralized and have taller organizational structures (Hodgetts & Luthans, 2000).

Uncertainty avoidance is the extent to which people feel threatened by ambiguous situations, and have created beliefs and institutions that try to avoid these (Hodgetts & Luthans, 2000). According to Hofstede (1980, 1994), people in countries such as Germany, Japan, and Spain tend to have a high need for security and tend toward uncertainty avoidance. On the other hand, people in countries such as Denmark, Great Britain, and the United States are more willing to take risks. It is suggested that firms in countries with lower uncertainty-avoidance tend to operate with "less structuring of activities, fewer written rules, more

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risk-taking by managers, and more ambitious employees” (Ruben,1989, p. 233).

Individualism is the tendency of people to look after only themselves and their immediate family (Hodgetts & Luthans, 2000). It has been found that people in the United States, Canada, Australia, Denmark, and Sweden, among others, have higher individualism. Conversely, Pakistan, and many South American countries have lower individualism. Countries with high individualism tend to have greater support for the Protestant work ethic and greater individual initiative (Hodgetts & Luthans, 2000).

Masculinity is a culture in which the dominant values in society are success, money, and possessives (Hodgetts & Luthans, 2000). Conversely, femininity is a situation in which the dominant values in society are caring for others and the quality of life (Hodgetts & Luthans, 2000). People in countries with a higher masculinity index, such as Japan, tend to emphasize earnings, recognition, advancement, and challenge. People in countries with a lower masculinity index or higher femininity index, such as Norway, tend to place greater importance on cooperation, a friendly atmosphere, and employment security (Hofstede, 1994).

Bond et al. (1987) identified the Confucian dynamic which consists of two poles. The higher values of Confucian dynamic represent values of thrift, persistence, loyalty, and a future orientation, whereas the lower values of Confucian dynamic represents respect for personal honor, face, tradition, and social hierarchy. It is suggested that the people in Asian countries (such as Taiwan, China, Japan, and Korea) tend to have higher scores on Confucian dynamic. Previous studies have indicated that the major purpose of cross-cultural training is to enhance adaptation skills, cross-cultural communication skills, and partnership skills (Kealey & Protheroe, 1996). As suggested, expatriates assigned to a host country with a different host culture may need more cross-cultural training (Vance & Paik, 2002).

#### **2.1.4. Expatriate Training**

The globalization of business activities has forced firms to develop more qualified expatriates. Expatriate training becomes one of the most important issues for business globalization (Harvey & Novicevic, 2001). Harvey and Novicevic (2001) suggested that effective expatriates should be able to capture the dynamic environment of the host country and to integrate the tacit knowledge of the host company. Expatriates who are not familiar with the culture of the host country are often not living happily and consequently not successful in the subsidiary company (Webb, 1996). Suutari and Burch (2001) contended that as expatriates

dispatching to the host country serve subsidiary firms, any kind of under performance on international assignments can be extremely costly. Copeland and Griggs (1985) estimated that the costs of a failed expatriate may be between US \$50,000 to US \$150, 000. The total direct costs of failed expatriate assignments to U.S. firms could be more than US \$2 billion a year, and these costs do not include the costs of corporate reputation damages and business opportunity losses. Thus, training of expatriates before their departure is essential. According to Tung (1998) and Harvey and Wiese (1998), many companies failed to pay sufficient attention to the training of potential expatriates.

Cross-cultural training (CCT) has long been regarded as an efficient tool for cross-cultural communication and management (Kim & Ofori-Dankwa, 1995). Activities of cross-cultural training have been evaluated extensively. Harris and Kumra (2000) developed a comprehensive framework for cross-cultural training courses. They argued that the objectives of the proposed cross-cultural management courses should be as follows: (a) to raise awareness of cultural differences and how this might impact on values and behaviors, (b) to introduce key cross-cultural frameworks as a sensitizing device, (c) to develop expatriates' "culture antennae" when working in diverse groups, and (d) to provide process guidelines for cross-cultural communication, negotiation, and teams (Harris & Kumra, 2000). However, cross-cultural training used in American firms was not very widespread (Black, 1988; Black & Mendenhall, 1990; Tung, 1982). Studies showed that only 31 percent of U.S. expatriates received cross-cultural training before their departure, compared to 38 percent of European expatriates and 67 percent of Japanese expatriates (Black & Mendenhall, 1990).

### **2.1.5. Social Support**

Social support can be broadly defined as "the availability of helping relationships and the quality of those relationships" (Leavy, 1983, p. 5). According to Kahn and Quinn (1970), social support may be of three types: aid, affect, or affirmation. In the expatriate context, aid entails providing relevant information and assistance to the expatriate in order to reduce his or her stress and help him or her make sense of the work environment. The second type of social support, affect, is based on interpersonal attraction between the source of social support and support seeker. Affect is similar to mutual liking and provides high-quality supportive relationships. The third type of social support is affirmation and refers to reaffirming the support seeker's abilities and beliefs in one to deal with the stressful situation.

Research on expatriate social support has acknowledged that individuals may obtain

support from various sources such as organizations, coworkers, supervisors, friends, and families. Theoretically, it is expected that support provided by the organization, supervisor, and family to be particularly important to expatriates. Aycan's (1997) model of expatriate acculturation highlighted the important role that organizations play in the acculturation of expatriates. Other scholars have also argued that organizational support may be an important determinant of employees' adjustment following a transfer (Payne, 1980). A second source of support that can occur on the job is that from the supervisor. Research has examined supervisor support as an important source of support for dealing with stress at work (e.g., Fisher, 1985; Ganster, Fusilier, & Mayes, 1986). Research has indicated the importance of the supervisor in influencing employee attitudes and job performance. Finally, spousal support in particular has been identified as a critical source of support for expatriates (Guzzo, 1996; Tung, 1981) due to the spill-over effect that family support can have on work outcomes (Brett & Werbel, 1980; Caplan & Killilea, 1976).

### **2.1.6. Expatriate Adjustment**

Adjustment to international assignments is considered to be a multidimensional construct consisting of three distinct aspects or dimensions of adjustment: (1) work adjustment (i.e., adjustment to the new job requirements), (2) interaction adjustment with individuals in the foreign country (i.e., socializing with host country nationals), and (3) general adjustment to the foreign culture and living conditions abroad (Black, 1988). In an extensive review of the then extant domestic and foreign work adjustment literature; Black, Mendenhall and Oddou (1991) proposed a comprehensive integrated model of international adjustment which focuses on several major sets of factors that influence these dimensions as determinants of adjustment. This model was subsequently expanded and tested by Shaffer, Harrison and Gilley (1999). The factors tested in that study were: (1) job factors, (2) organizational factors, (3) positional factors (4) non-work factors, and (5) individual factors.

In the context of an expatriate assignment, managerial development reasons for assignment can be intuitively linked to Nicholson's (1984) original adjustment modes. These adjustment modes involve personal changes in the expatriate and/or in the way the expatriate performs his or her work, and arguably they result in managerial development. In contrast, control reasons for assignment foster additional adjustment modes that focus the expatriate on inducing change in subordinates to better match the firm's desired employee behaviors. That is, when the reason for the assignment is control, expatriates will engage in behaviors oriented

toward changing subordinates (subordinate personal change) and how subordinates perform their jobs (subordinate role innovation). Thus, based on the reason(s) for assignment, we argue that expatriate managers adjust through a combination of personal changes and role innovation, while fostering similar changes in their subordinates (i.e., subordinate personal changes and subordinate role innovation) as well.

It is often assumed that high-performing expatriates at the parent firm will also be high performers in the subsidiaries. However, this assumption only can be verified if the expatriates adjust their working styles to meet the culture of the host nationals. If the expatriates are not able to adapt to the host country culture, the results could be reversed (Suutari & Brewster, 2000). Thus, although many recruitment specialists emphasized overseas experience and competence as the key expatriate selection criteria, more and more specialists used cross-cultural capability as the necessary and important criteria for expatriate recruitment (Harris & Kumra, 2000).

### **2.1.7. Expatriate Operational Capability**

Taking a foreign assignment substantially affects a person's social and professional life. These changes involve many stress provoking factors, such as uncertainty and ambiguity (Black, 1988). Moving into a new cultural environment may also produce a feeling of not having control over the situation and as Hofstede (1980) has stated “the forced exposure to alien cultural environment can put people under heavy stress” to an expatriates’ ability to deal with potentially stressful situations. There are three major capabilities that can enhance the success of expatriates: stress tolerance, relational ability and communicational ability. Stress tolerance refers to person's ability to deal with potentially stressful situations that has indeed been proposed as an important determinant of adjustment (Mendenhall and Oddou, 1985; Black, 1988) and performance.

Relational ability refers to the capacity of the expatriate to interact effectively with different groups of people and to establish close relationships with host nationals (Tung, 1981). Establishing relationships with host nationals is beneficial to the adjustment process due to the information exchange included in such relationships. The more the expatriate interacts with host nationals, the more s/he will receive information about behavioural norms and the rationale for why people behave in a certain way. As a consequence the expatriate will be able to adjust his/her own behavior to fit these norms. Being able to act in an appropriate way and predict the behavior of others will reduce uncertainty and increase the feelings of comfort and

adjustment (Mendenhall and Oddou, 1985) and is also likely to improve the expatriate's job performance.

Communicational ability refers to the ability of expatriates to initiate interaction with a stranger, ability to enter into a meaningful dialogue with other people and his/her ability to deal effectively with communication misunderstandings between him/her-self and others. In a literature review Mendenhall and Oddou (1985) suggested that it is not the language fluency of the expatriate, but rather the communicational ability that is of specific importance in relation to adjustment. After a basic proficiency in a language has been acquired, it is the willingness or desire of a person to become involved in communications with host nationals that determine the amount of information the individual can receive from the host nationals. The more the expatriate gets involved in communication the better the person can understand the host country culture and nationals. This increased understanding will reduce uncertainty, and increase adjustment and job performance.

### **2.1.8. Expatriate Performance**

As stated above, a presumption driving much of the expatriate literature is that maladjustment can translate into poor performance (e.g., Caligiuri, 1997). In research on domestic stress, theorists have argued and data have supported the idea that psychological stress can have pernicious effects on work performance; it induces fatigue, which deprives individuals of the energy needed to successfully perform job duties (e.g., Cohen, 1980). Parallel arguments have been made about international assignments. For example, Shaffer and colleagues (2001) contended that well-adjusted expatriates will have greater reserves of personal resources (time, effort, emotional investment) available to spend on the behaviors that facilitate their job performance. Models of the “criterion space” in international HR (e.g., Ones & Viswesvaran, 1997), suggest those fulfilling specific task requirements, as well as developing and maintaining relationships with host country nationals, are the core facets of expatriate performance.

These two facets are fairly consistent with the task/technical and contextual / interpersonal facilitation dimensions that researchers have suggested (e.g., Borman & Motowidlo, 1993). *Task performance* refers to successful execution of overseas duties, including attaining specific goals or accomplishing definable projects. It should be more strongly related to expatriate's work adjustment and operational capability. When tracked as a separate criterion dimension, *relationship (contextual) performance* is the effective development or maintenance

of ties with members of the host country workplace. Given its interpersonal substrates, we expect that it will be more strongly related to cultural and interaction adjustment. In addition, because some empirical articles have measured performance as a combination of task and relationship elements, we defined a third variable, overall performance. *Overall performance*, a global measure of effectiveness, includes an individual's productivity and organizational contributions and the extent and quality of his or her execution of assigned duties, including task and relationship maintenance.

## **2.2. Hypotheses Development**

### **2.2.1 The influence of expatriate characteristics on expatriate adjustment, operational capability, and expatriate effectiveness.**

Expatriate characteristics have an important role in influencing the expatriate adjustment (Black & Gregersen, 1991; Schneider & Asakawa, 1995). According to Black (1987), there are many individual characteristics of expatriate that are considered to be important for affecting expatriate adjustment. By summarizing from various literatures, he identified the expatriate characteristics that affect on expatriate adjustment into several factors. Those are the individual's desire to adjust (Brimm, 1966; Cogswell, 1968; Mortimer & Simmons, 1978; Tung, 1982); Technical or managerial competence (Bardo & Bardo, 1980; Harris, 1973; Hawes & Kealey, 1981); a person's social relation skills orientation (Abe & Wiseman, 1983; Hammer, Gudykunst & Wiseman, 1978; Louis, Posner, & Powell, 1983; Ratiu, 1983; Ross, 1985); an individual's tolerance for ambiguity or "open mindedness" (Detweiler, 1975; Gudykunst, Wiseman, & Hammer, 1977; Kahn, Wolfe, Quinn & Snoek, 1964; Ratiu, 1983; Ruben, 1976; Ruben & Kealey, 1979); an individual's self-confidence (Fisher, 1982; Jones, 1986); meet expectations (e.g., Ilgen, 1975; Toffler, 1981) and reinforcement substitution (David, 1976). Others scholars propose that previous international work experiences are also an important individual characteristic to affect expatriate adjustment (Black, et al., 1991; Andreason, 2003) and those become source of information in which expatriate can form the precise expectation (Church, 1982; Black, Mendenhall, & Oddou, 1991). It has been proved by Black (1988) that there is a positively relationship between previous international adjustment experiences and work adjustment during the existing international assignment.

Besides having a relationship with expatriate adjustment, expatriate characteristics also have a relationship with expatriate effectiveness when expatriate effectiveness is measured in term of job satisfaction and expatriate characteristic is measured in term of previous interna-

tional experience (Downes, Thomas, & Singley, 2002) and personality (Arthur & Bennett, 1995; Black, 1990; Ones & Viswesvaran, 1999; Caligiuri, 2000). Downes et al. (2002) argue that work experiences have positive effect on expatriate satisfaction and Arthur and Bennett (1995) find that there is a relationship between personality and expatriate success. Those ideas are strengthened by Yavas & Bodur's (1999b) study. They suggest that certain background characteristics are related to expatriate satisfaction.

Another relationship that expatriate characteristics have is with expatriate operational capability when expatriate characteristics are measured in term of competence and expatriate operational capability is measured in term of ability to handle stress (Bandura, 1977; Aycan, 1997). It is concluded that competence can help expatriates reduce stress and facilitate adjustment. Based on those descriptions, we develop a hypothesis:

***H1: There will have a significant influence of expatriate characteristics on (a) expatriate adjustment, (b) operational capability and (c) expatriate performance.***

### **2.2.2 The influences of expatriate task assignment on expatriate adjustment, operational capability, and expatriate effectiveness.**

Expatriate task assignment is one of major factors that influence expatriate adjustment (Brett & Werbel, 1980; Feldman & Tompson, 1993). They use promotion, new position, and the first job out of school to measure job characteristics. Many scholars argue that expatriate task assignment, measured in term of similar task, has relationship with expatriate adjustment (Yavas & Bodur, 1999a). They further explain that expatriates who are assigned in similar tasks that they have experienced in the parent company before, have less difficulty to adjust "at least-task related aspects of their jobs in turnkey, hence exhibit higher satisfaction".

As one of predictors of expatriate satisfaction, expatriate task assignment, measured in term of the characteristic of the task, has received much attention from scholars (Glick, Jenkins, & Gupta, 1986; Glisson & Durick, 1988; Naumann, 1993). Of the characteristics of the task, role ambiguity, skill variety, and task complexity have been strongly supported as predictor of job satisfaction. Other characteristics of the task such as role conflict, task identity, task significance, autonomy, and feedback have been supported as predictor of job satisfaction but the support is weaker than role ambiguity, skill variety, and task complexity (Naumann, 1993). Based on the above discussion we can argue that expatriate task assignment, measured in term of job characteristics, has a relationship with expatriate satisfaction.

When an expatriate has large variety skills, high task identity, high task significance, high autonomy, and low feed back, he or she will perceive that his or her assignment as meaningful, his or her responsibility as large and his or her feedback as inadequate. Reversely, if an expatriate has small variety skills, low task identity, low task significance, low autonomy, and high feed back, he or she will tend to have a high-stress assignment (Bird & Dunbar, 1991). Even though that study does not mention directly the relationship between expatriate task assignment and expatriate operational ability but from that explanation we can argue that when an expatriate has large variety skills, high task identity, high task significance, high autonomy, and low feed back, he or she will tend to have high stress tolerance. As a result, expatriate's relational and communication capability could be improved under the low stress expatriation environment. It is because by using those dimensions, expatriates tend to be able to reduce stress provoking factors. Of course if expatriate can do their job well in the new environment, they will stay far from stress. Therefore expatriate task assignment, measured in term of job characteristic, has relationship with expatriate operational capability, measured in term of an ability to handle stress. Based on those descriptions, we develop a hypothesis:

***H2: There will have a significant influence of expatriate task assignment on (a) expatriate adjustment, (b) operational capability and (c) expatriate performance.***

### **2.2.3 The influences of cross-culture difference on expatriate adjustment, expatriate operational capability, and expatriate effectiveness.**

One of non-work factors that are suggested to be an important factor to expatriate adjustment is culture novelty (Black et al., 1991). Culture novelty can be defined as “the perceived distance between host and parent country culture” (Shaffer, et al., 1999; Andreason, 2003). From previous studies, it is found that culture novelty had negatively relationship with the expatriate adjustment (Shimoni, Ronen, & Roziner, 2005). This statement also supported by Stahl & Caliguri (2005). By summarizing some notions from previous studies it is contended that, in term of “cultural distance” (Hofstede, 1980); “culture novelty” (Black, et al., 1991); “cultural toughness” (Mendenhall & Oddou, 1985); or “cultural barriers” (Torbiorn, 1982), can impede expatriate adjustment. Similar to those ideas, Holopainen & Björkman (2005) contend that if there is a large culture distance between the host country and the home country, it will make expatriate to have more difficult time to adjust. Therefore, it makes sense that culture distance has a negatively impact on expatriate adjustment and effectiveness (Black & Stephens, 1999; Holopainen & Bjorkman, 2005).

On the other hand, psychological stress experienced by expatriate can source from culture novelty (Kraimer et al., 2001). When an expatriate feels that his or her culture is very different from the host country, he or she may experience psychological stress. It is because the gap between home culture and host national culture can cause expatriate in uncertainty and anxiety. If those happen, automatically, psychological stress will easily arise. At the same time, expatriates' relational and communication capability could be tempered due to high cross-cultural distance. Therefore it is concluded that cross-culture difference has relationship with expatriate operational capability when measured in term of stress tolerance. Based on those descriptions, we develop a hypothesis:

***H3: There will have a significant influence of cross-culture different on (a) expatriate adjustment, (b) operational capability and (c) expatriate performance.***

#### **2.2.4 Interrelationship between expatriate adjustment and expatriate operational capability (H<sub>4</sub>)**

There has not been a study yet that conducts a research of the relationship between expatriate adjustment and expatriate operational capability. However, we can borrow the stress management theories of psychological stress to find the logic behind the relationship between expatriate adjustment and expatriate operational capability. Stress management theories suggest that expatriates who adjust poorly in new environment will face psychological stress (Nicholson & Ayako, 1993; Selmer, et al., 1998; Kraimer et al., 2001). Reversely, expatriates who adjust well in new environment will be able to reduce psychological stress. Therefore, expatriate adjustment is a very important factor that can extend their stress tolerance. By having large stress tolerance, expatriates can minimize psychological stress. Consequently, they can improvement their relational and communication capability with local employees and agencies. Thus, it is argued that expatriate adjustment has an influence on expatriate operational capability when measure in term of stress tolerance. Based on those explanations, we can develop a hypothesis:

***H4: There will have a significant influence of expatriate adjustment on expatriate operational capability.***

#### **2.2.5 Interrelationship between expatriate adjustment and expatriate effectiveness (H<sub>5</sub>)**

Black and his colleagues contend that expatriate adjustment is not a single concept but it consists of three dimensions: adjustment to work, adjustment to interacting with host nation-

als, and adjustment to the general environment (Black, 1988, 1990; Black, et al., 1991; Stahl & Caliguri, 2005). In expatriate literature, it is suggested that expatriate adjustment is positively relates to performance on international assignment and intent to stay in the host country (Caliguri, 1997; Stahl & Caliguri, 2005) and negatively relates to early termination of the international assignment (Gregerson & Black, 1990; Torbiorn, 1992, Stahl & Caliguri, 2005). Empirically, it has been proved that expatriate adjustment has positively relationship with the job performance (Kraimer & Wayne, 2004). Previous studies also argued that, based on stress management theory, adjustment is related to performance. People who could adjust well at workplace would perform well (Kraimer et al., 2001). Based on above discussion, we can develop the following hypothesis:

***H5: There will have a significant influence of expatriate adjustment on expatriate effectiveness***

### **2.2.6 Interrelationship between expatriate operational capability and expatriate effectiveness**

There are three major capabilities that can enhance the success of expatriate: stress tolerance, relational ability, and communicational ability. Stress tolerance refers to an expatriates' ability to deal with potentially stressful situational. Relationship ability refers to expatriates' ability to make relationship effectively with others in the host national. Communicational ability is the expatriates' ability to initiate interaction with the stranger (Holopainen & Bjorkman, 2005). In their study, they found that communicational ability is positively related to performance.

However, other scholars propose that expatriate's abilities such as ability to deal with intercultural stress, ability to communicate, and ability to make relationship is important abilities in increasing expatriate's satisfaction. Downes et al. (2002) further explain that expatriate's abilities dealing effectively with frustration stress, different political system, interactions with strangers, and a host of other intercultural dimensions can lessen anxiety and at the same time can increase expatriate's satisfaction. Based on above discussion, we can develop the following hypothesis:

***H6: There will have a significant influence of expatriate operational capability on expatriate effectiveness***

### **2.2.7 Moderating effects of expatriate training on expatriate adjustment (H<sub>7</sub>)**

The relationship between pre-departure training and cross culture adjustment has been studied by many scholars (Black & Mendenhall, 1990; Fiedler, Mitchell, & Triandis, 1971; Black et al., 1991). Those studies found that there is positively relationship between cross culture training and cross culture adjustment, cross-culture skill development and job performance (Black & Mendenhall, 1990; Black et al., 1991). On the other hand, Downes, et al. (2002) contend that expatriate training positively affects on expatriate satisfactions. In addition, expatriate training, in term of predeparture training, affects on work as well as general adjustment in the host country (Downes, et al., 2002) and provides expatriates opportunities to develop their skill (Downes, et al., 2002). Training can be held in term of cross-culture, job, health and stress, and language training. Those are aimed for increasing their ability to cope problems at new workplace and to make quicker adjustment (Bird & Dunbar, 1991).

The moderating effects of expatriate training on influences of expatriate characteristics, task assignment, and cross cultural differences on expatriates adjustment is apparent. The study results of Wu Lee (2005) indicated that expatriates who received high level of expatriate training would result in higher levels of expatriate adjustment. Thus, it is suggested that the contingency fit between expatriate training and antecedents of expatriate adjustment will enhance expatriate adjustment. In addition, the appropriate level of training for expatriates predicted to increase expatriate operational capability and effectiveness. However, empirical validations on these issues were limited. Based on the above discussion, the following hypothesis is developed:

***H7: The level of training for expatriate will moderate the influence of expatriate characteristics, expatriate task assignment, and cross-cultural differences on expatriate adjustment, operational capability and effectiveness***

### **2.2.8 Moderating effects of social support on expatriate adjustment (H<sub>8</sub>)**

Social support is believed to be able to reduce the stress associated with working in new country (Kraimer et al., 2001). It is argued that social supports, in term of supervisor and organizational support, have positively relationship with the expatriate adjustment and performance (Guzzo, et al., 1993; Payne, 1983; Kraimer & Wayne, 2004). Other scholars also indicated that organizational support is one of primary factors in predicting expatriate adjustment (Caliguri, et al., 1999; Shaffer et al., 1999).

Previous literature has further indicated that, although the influences of expatriate characteristics, task assignment, and cross-cultural differences on expatriate adjustment is apparent, social support can enhance the magnitude of these influences (Kraimer & Wayne, 2004). Without the supports from expatriate's supervisor and organization, the expatriate adjustment may be discounted. In addition, the relationship between social support and operational capability and expatriate effectiveness reported by International Committee of the Red Cross (2004) in every country during their duty activities to support host country to recover from disaster.

The study indicated that if expatriate has a high level of social support, then the magnitude of the influences of expatriate characteristics, task assignment, and cross-cultural differences on expatriate adjustment, their operational capability as well as effectiveness will be amplified. Based on the above discussion, the following hypothesis is developed:

***H8: The level of social support for expatriate will moderate the influence of expatriate characteristics, expatriate task assignment, and cross-cultural differences on expatriate adjustment, operational capability and effectiveness.***

### III. Research Design and Methodology

#### 3.1 Research Model

The first purpose of this study is to develop a comprehensive model that encompassed the interrelationships among expatriate characteristics, complexity of expatriate task assignment, cross-cultural difference, expatriate adjustment, expatriate operational capability and expatriate effectiveness. The second purpose of this study is to evaluate the moderating effects of expatriate training and social support on expatriate adjustment, expatriate operational capability, and expatriate experiences. Based on the above literature reviews and hypotheses development, this study developed a research model as shown in Figure 2. It is suggested that expatriate characteristics, expatriate task assignment, and cross-cultural differences between host country and home country will influence expatriate adjustment, expatriate operational capability, and expatriate effectiveness. In addition, the levels of expatriate training and organizational support will serve as moderating variables to enhance the influences of expatriate characteristics, expatriate task assignment and cross-cultural differences on expatriate adjustment, expatriate operational capability, and expatriate effectiveness. Furthermore, it is suggested that both expatriate adjustment and expatriate operational capability will impact on expatriate effectiveness.

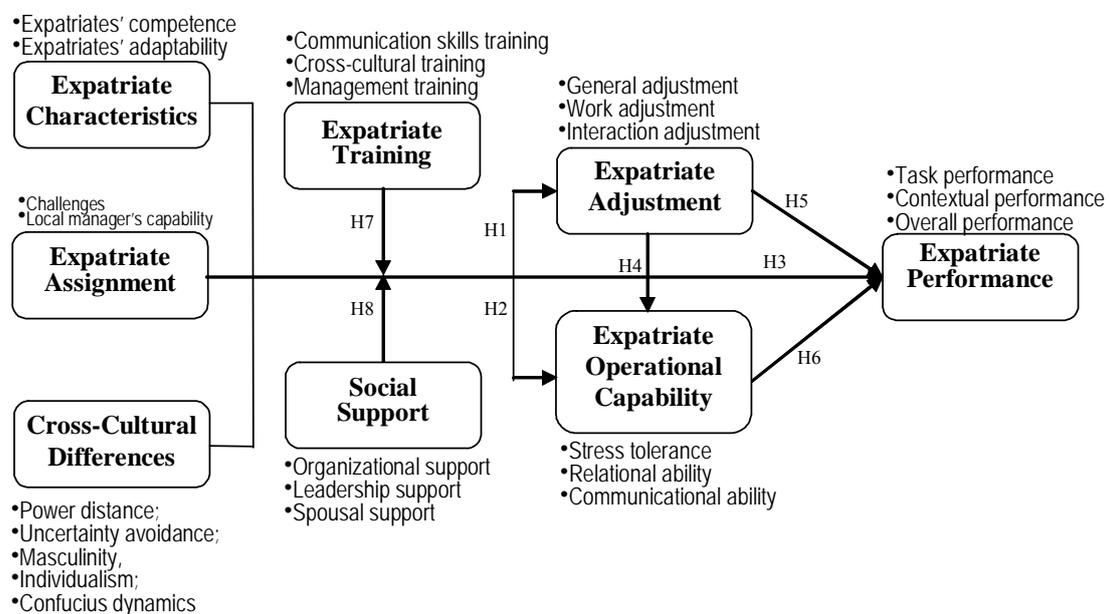


Figure 2. The research framework of this study

#### 3.2 Participants and Sampling Plan

Data collection involves two phases. In the initial phase, data was collected through a

structured mailing. The sample was drawn from the expatriates of Taiwanese MNC firms, which are operated at least three countries in the world. Emails were sent to the human resources department managers of MNC subsidiaries in the host countries to ask for identifying appropriate expatriates to participate in this study. Three hundred expatriates were mailed and asked to express the opinions about the research constructs. Three weeks after the initial mailing, 73 of the 300 expatriates responded. The study continued to the second phase by sending an email invitation letter to other 600 expatriates who obtained from the human resources department managers previously. In the second phase, expatriates were asked to answer the questions through online surveys; another 149 questionnaires had been completed for an overall total of 222. Four questionnaires were unusable because of some missing responses, eventually, the effective questionnaires were 218 (response rate 24.22 percent).

### **3.4 Construct Measurement**

A preliminary version of the questionnaire was verified by two panel discussions. Survey questionnaire items were selected based on the review of literature and the purpose of this study. The first discussions were conducted with three professors and continued with 6 Ph.D. students in management in the second round. Each questionnaire items was reviewed for its appropriateness in wording and in content. The questionnaire items were revised based on the focus group discussions before putting into the final form. Research items for the following nine constructs were developed:

1. Measurement items of the characteristics of expatriates, including expatriates' personal competence and adaptability are adapted from Harvey and Novicevic (2001). The questionnaire items are as follows:
  - a. Personal competence
    - I have high self-confidence
    - I have good interpersonal skills
    - I have good communication skills
    - I have a great deal of technical competence related with my job
  - b. Adaptability in the host country
    - I understand the culture in host country
    - I have ability to adapt in host country's culture
    - I have knowledge about host country language
2. Measurement items of expatriates' task assignment, including task challenges and local

manager's capability are adopted from Tung (1981). The questionnaire items are as follows:

a. Challenges

- This assignment is much more complex than my previous expatriate assignment
- The job position of this expatriate assignment is higher than my previous assignment
- The job content of this expatriate assignment is totally different from my previous expatriate assignment

b. Local Manager's Capability

- The technical competence of local managers of this expatriate assignment is lower than my previous assignment
- The communication skills of local managers of this expatriate assignment is lower than my previous assignment

3. Measurement items of cross-cultural differences, including power distance, uncertainty avoidance, masculinity, individualism, and Confucius dynamics (Lee & Croker, 2006). The questionnaire items are as follows:

a. Power Distance

- The conformity degree of superiors' wishes
- The avoidance of any potential arguments with superior
- The decision making by superiors without discussion with subordinates

b. Uncertainty Avoidance

- The important to work under well-defined job
- The important to work in the company with the employment stability
- The important of detailed rules/regulations, so workers know what is expected from them

c. Individualism

- The favorability of collective work compare to individual work
- The important of personal responsibility compare to group's
- The personal accomplishment is more important than group success

d. Masculinity

- The important to outperform others in my company
- The important to work in a prestigious and successful company or organization
- The important to have a job that has an opportunity for high earnings

- e. Confucius Dynamics
    - The important of being persistence
    - The important of being loyal person
    - The important of respecting the tradition
4. Measurement items of expatriate training, including communication skills training, cross-cultural training, and sensitivity training selected from Wu-Lee (2005). The questionnaire items are as follows:
- a. Communication related training
    - My company provides language training adequately
    - My company provides communication skills training adequately
    - My company provides local social customs information adequately
  - b. Cognitive training
    - My company provides cultural orientation training adequately
    - My company provides general environmental briefings of host country
    - My company provides local dominant values information adequately
  - c. Experiential training
    - My company provides on-the-job training adequately
    - My company provides on-site simulations training adequately
    - My company provides field experience training adequately
5. Measurement items of social support, including organizational support, leadership support, and spousal support are selected from Aycan (1997); Ganster et al., (1986); and Leavy, (1983). The questionnaire items are as follows:
- a. Organizational Support
    - My organization cares about my opinions;
    - My organization always helps me when I have a problem;
    - If given the opportunity, my organization would not take advantage of me;
    - My organization shows big concern for me;
  - b. Leadership Support
    - I like my supervisor very much as a person
    - My supervisor is the kind of person one would like to have as a friend
    - My supervisor defends my work actions to a superior, even without complete knowledge of the issue in question

- My supervisor would come to my defense if I were “attacked” by others
  - I do work for my supervisor that goes beyond what is specified in my job description
- c. Spousal Support
- Financial support for education;
  - Development of support groups for spouses;
  - Help with spouse’s reentry into home country;
  - Compensation for spouse’s lost wages and or benefits;
  - Company provide pre-departure training for spouse and children;
  - Company help in obtaining necessary papers (work permits, etc) for spouse;
  - Counseling for spouse regarding work/activity opportunities in foreign location
6. Measurement items of expatriate adjustment, including adjustment to work, adjustment to general environment, and interactions with host country citizens are selected from Black, (1988); and Black & Stephens, (1989). The questionnaires items are as follows:
- a. How adjusted are you to your job and responsibilities?
  - b. How adjusted are you to working with Japanese co-workers?
  - c. How adjusted are you to the transportation system in Japan?
  - c. How adjusted are you to working with your foreigner outside your company?
  - d. How adjusted are you to the food in foreign country?
  - e. How adjusted are you to the weather in foreign country?
  - f. How adjusted are you to interacting with foreigner in general?
  - g. How adjusted are you to shopping in foreign country?
  - h. How adjusted are you to supervising foreigner subordinates?
  - i. How adjusted are you to generally living in foreign country?
  - j. How adjusted are you to the entertainment available in foreign country?
7. Measurement items of expatriate operational capability, including adaptability to change, rational ability, and communicational ability are selected from Black (1988); and Mendenhall & Oddou, (1985). The questionnaire items are as follows:
- a. Stress tolerance
    - I am able to deal effectively with frustration
    - I am able to deal effectively with stress

- I am flexible to new changing conditions
  - I am able to operate efficiently in new challenging situations.
- b. Relational ability
- I am able to establish satisfying interpersonal relationships
  - I am able to accurately understand the feelings of others,
  - I am able to empathise with another person
  - I am able to co-operate efficiently.
- c. Communicational ability
- I am able to initiate interaction with a stranger,
  - I am able to enter into a meaningful dialogue with other people
  - I am able to deal effectively with communication misunderstandings between him/her-self and others.
8. Measurement items of expatriate performance, are selected from Black and Porter, (1991); Fisher and Hartel (2004). The questionnaire items are as follows:
- a. Task performance
- I have capability to completing my tasks on time;
  - I have good quality of performance;
  - I have good achievement on my work goals;
- b. Contextual performance
- I have good ability to get along with others;
  - I maintain good relationship with my local coworkers;
  - I maintain good relationship with local social environment;
- c. Overall performance
- My overall performance during my assignment is good;
9. Measurement items of demographic information of each respondent has eight items, including gender, marital status, age, occupation, education, position, industry type, and operational history.

## **IV. Empirical Results**

### **4.1. Respondents Characteristics**

The sample was drawn from Taiwan MNCs and selected via quota sampling method which at least operated in 3 countries. Three weeks after the initial mailing, 73 of the 300 expatriates responded. The study continued to the second phase by sending an email invitation letter to 600 expatriates which obtained from the Human Resources department of Taiwan MNCs to take some time filling out the online survey. Two weeks later, another 149 questionnaires had been completed for an overall total of 222 (response rate 24.67 percent). Four questionnaires were unusable because of some missing responses, eventually, the effective questionnaires were 218.

The following are the basic attributes of the respondents and the sample firms. Male respondents were 53.7 percent, and majority has single status (56.9 percent). More than sixty percent has an age above 26 years old, and ninety eight percent has earned degree at least bachelor degree. A quarter of them have engineering position, and the rests have managerial position. The sample firms has operated in conventional manufacturing industry (35.8 percent), high tech manufacturing industry (36.7 percent), and service industry (27.5 percent). More than sixty percent has operated more than 4 years, which one third operates more than 3 countries. Moreover, less than forty percent has annual sales below NT\$100 millions, and more than sixty percent of companies running with more than 100 employees.

### **4.2. Factor Analysis and Reliability Tests**

In order to verify the dimensionality and reliability of constructs of this study, purification processes, including factor analysis, correlation analysis, and coefficient alpha analysis were conducted. Factor analysis examined the basic structure of the data; internal consistency for each dimension measured by item-to-total correlation; and the reliability of measurement items confirmed by Cronbach's  $\alpha$  which generally accepted guideline is 0.70 (Hair, et al. 1998). Using the cut-off criteria of 0.7 for factor loading, 0.5 for item to total correlation, and 0.7 for Cronbach's Alpha, the results of factor analysis show that there are two factors for expatriate characteristics, two factors for expatriate assignment, five factors for cross-cultural differences, three factors for expatriate training, three factors for social support, three factors for expatriate adjustment, three factors for expatriate operational capability, and three factors for expatriate performance. Table 1 presented the factor analysis results:

**Table 1. Factor Analysis Results**

<b>Construct</b>	<b>Variables</b>	<b>Factor Loading</b>	<b>Eigen-value</b>	<b>Accumulative Ex-planation (%)</b>	<b>Item to total correlation</b>	<b>Cronbach's Alpha</b>
<b>Expatriate Characteristics</b>	Expatriate competence		3.392	84.798		0.939
	Var1	0.934			0.836	
	Var2	0.933			0.879	
	Var3	0.908			0.878	
	Var4	0.907			0.837	
	Adaptability in the host country		2.621	87.362		0.927
	Var5	0.945			0.835	
<b>Cross-Cultural Differences</b>	Var6	0.933			0.873	
	Var7	0.926			0.847	
	Power Distance		2.260	75.324		0.835
	Var2	0.890			0.735	
	Var1	0.870			0.698	
	Var3	0.843			0.658	
	Uncertainty Avoidance		2.382	79.395		0.869
	Var3	0.911			0.789	
	Var2	0.882			0.737	
	Var1	0.879			0.730	
	Individualism		2.418	80.609		0.879
	Var2	0.929			0.827	
	Var1	0.888			0.745	
	Var3	0.876			0.728	
Masculinity		2.170	72.329		0.804	
Var2	0.891			0.727		
Var3	0.849			0.645		
Var1	0.809			0.591		
Confucius Dynamics		2.541	84.715		0.910	
Var2	0.937			0.851		
Var1	0.919			0.818		
Var3	0.905			0.790		
<b>Expatriate Assignment</b>	Challenges		3.185	79.621		0.914
	Var1	0.879			0.784	
	Var2	0.910			0.833	
	Var3	0.882			0.790	
	Var4	0.898			0.814	
	Capability		2.692	89.737		0.942
	Var5	0.938			0.863	
Var6	0.953			0.892		
Var7	0.951			0.888		
<b>Expatriate Training</b>	Communication related training		2.739	91.295		0.952
	Var1	0.954			0.896	
	Var2	0.966			0.922	
	Var3	0.946			0.880	
	Cognitive training		2.753	91.733		0.955
	Var4	0.952			0.893	
	Var5	0.960			0.910	
	Var6	0.962			0.913	
	Experiential training		2.776	92.529		0.950
Var7	0.953			0.895		
Var8	0.972			0.934		
Var9	0.961			0.911		
<b>Social Support</b>	Organizational Support		3.189	79.722		0.913
	Var2	0.917			0.841	
	Var3	0.886			0.797	
	Var1	0.885			0.789	
	Var4	0.883			0.793	
	Leadership Support		3.484	69.684		0.888
	Var4	0.891			0.802	
	Var5	0.860			0.760	
	Var1	0.846			0.766	
	Var3	0.825			0.707	
	Var2	0.745			0.622	
	Spousal Support		5.848	83.541		0.967
	Var4	0.942			0.919	

Construct	Variables	Factor Loading	Eigen-value	Accumulative Ex-planation (%)	Item to total correlation	Cronbach's Alpha
	Var2	0.940			0.916	
	Var1	0.936			0.910	
	Var3	0.927			0.900	
	Var6	0.911			0.877	
	Var5	0.891			0.853	
	Var7	0.847			0.796	
	General adjustment		4.008	80.161		0.937
	Var1	0.872			0.799	
	Var2	0.914			0.859	
	Var3	0.872			0.800	
	Var4	0.934			0.890	
	Var5	0.883			0.816	
<b>Expatriate Ad-justment</b>	Work adjustment		1.858	92.896		0.923
	Var6	0.964			0.858	
	Var7	0.964			0.858	
	Interaction adjustment		1.875	93.763		0.933
	Var8	0.968			0.875	
	Var9	0.968			0.875	
	Stress tolerance		3.373	84.326		0.938
	Var1	0.907			0.833	
	Var2	0.936			0.880	
	Var3	0.916			0.850	
	Var4	0.914			0.847	
	Relational ability		3.447	86.170		0.946
<b>Expatriate Op-erational Capa-bility</b>	Var5	0.917			0.852	
	Var6	0.924			0.864	
	Var7	0.943			0.895	
	Var8	0.929			0.871	
	Communicational ability		2.696	89.872		0.944
	Var9	0.946			0.879	
	Var10	0.954			0.895	
	Var11	0.943			0.873	
	Task performance		2.711	90.372		0.946
	Var1	0.955			0.896	
	Var2	0.970			0.928	
	Var3	0.926			0.840	
<b>Expatriate Per-formance</b>	Contextual performance		2.736	91.195		0.952
	Var4	0.938			0.865	
	Var5	0.960			0.908	
	Var6	0.966			0.921	

### 4.3. Hypotheses Testing

In order to test the hypotheses, a series of multiple regressions were conducted. Table 2 exhibited that two factors of expatriate characteristics (expatriate competence and adaptability in the host country) have significant influence on three types of expatriate adjustment. The coefficient of determination ( $R^2$ ) range above 0.6. Therefore, Hypotheses 1-a is supported in this study. In the same Table (Table 2), it also revealed that two factors of expatriate task assignment (challenges and local manager's capability) have significant influence on two types of expatriate adjustment (general and interaction adjustment), however, the local manager capability does not have significant influence on work adjustment; thus, Hypothesis 2-a is partially supported.

In terms cross-cultural differences, power distance has significant influence on the

expatriate general and interaction adjustment; uncertainty avoidance does not affect the level of adjustment; individualism exhibited significant effects on general and interaction adjustment; masculinity has no effect on the level of adjustment; and finally the Confucius dynamics has significant effects on three types of expatriate adjustment. Therefore, Hypothesis 3-a only partially supported.

**Table 2. The Regression Results on Expatriate Adjustment**

Independent Variables	Dependent Variable – Expatriate Adjustment								
	General Adjustment			Work Adjustment			Interaction Adjustment		
	M1	M2	M3	M4	M5	M6	M7	M8	M9
<i>Expatriate Characteristics</i>									
- Expatriate competence	0.463***			0.587***			0.468***		
- Adaptability	0.376***			0.222*			0.356***		
<i>Expatriate Task Assignment</i>									
- Challenges		0.563***			0.574***			0.527***	
- Capability		0.231***			0.118			0.240***	
<i>Cross Cultural Differences</i>									
- Power distance			0.251**		0.099				0.270***
- Uncertainty avoidance			0.071		0.101				0.105
- Individualism			0.231***		0.090				0.176**
- Masculinity			0.136		0.138				-0.036
- Confucius dynamics			0.221**		0.452**				0.384***
$R^2$	0.652	0.547	0.669	0.616	0.658	0.380	0.629	0.508	0.669
Adjusted $R^2$	0.649	0.543	0.661	0.612	0.650	0.352	0.625	0.503	0.661
F-value	201.328	129.971	85.808	172.216	81.830	13.602	182.195	110.941	185.513
P (sig.)	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
D-W	1.951	1.745	2.012	1.955	1.992	2.197	1.883	1.666	1.891

Table 3 presented the effects of three variables proposed as independent on expatriate operational capability. Similar with previous results, the expatriate characteristics have significant effects on the ability of expatriate to maintain their stress level, and at the same time capable to have relation and communicate with local people in significant manners; thus, Hypothesis 1-b is supported. The degree of challenges of expatriation has significant positive relationship on expatriate operational capability; however, the capability of local managers does not have significant influence. Thus, the results only confirmed Hypothesis 2-b modestly. Finally, the power distance, individualism and Confucius dynamics can be determinants for expatriate operational capability, while masculinity can be a good predictor for relational and communicational ability. Therefore, Hypothesis 3-b only confirmed partially.

Table 4 reported the effects of independent variables on the performance degree of expatriate. The results revealed that expatriates' competence and adaptability have significant influence on three types of performance: task, contextual, and overall performance. It confirmed the proposed Hypothesis 1-c. Similar with previous results, the degree of assignment's challenges has significant influence on expatriates' performance, whereas local manager's capa-

bility has insignificant influence on expatriates' performance. Thus, Hypothesis 2-c only partially supported.

**Table 3. The Regression Results on Expatriate Operational Capability**

Independent Variables	Dependent Variable – Expatriate Operational Capability								
	Stress Tolerance			Relational Ability			Communicational Ability		
	M10	M11	M12	M13	M14	M15	M16	M17	M18
<i>Expatriate Characteristics</i>									
- Expatriate competence	0.589***			0.594***			0.617***		
- Adaptability	0.267***			0.254***			0.216**		
<i>Expatriate Task Assignment</i>									
- Challenges		0.640***			0.719***		0.630***		
- Capability		0.114			0.034		0.079		
<i>Cross Cultural Differences</i>									
- Power distance			0.175*			0.154*			0.277***
- Uncertainty avoidance			0.003			0.106			-0.098
- Individualism			0.250***			0.167**			0.204**
- Masculinity			0.145			0.188*			0.271**
- Confucius dynamics			0.365***			0.318***			0.213*
$R^2$	0.686	0.522	0.681	0.674	0.551	0.714	0.639	0.471	0.622
Adjusted $R^2$	0.683	0.517	0.674	0.671	0.547	0.708	0.636	0.466	0.613
F-value	234.328	117.209	90.687	221.945	132.006	105.740	190.339	95.688	69.626
P (sig.)	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
D-W	1.820	1.556	1.782	1.801	1.771	1.779	1.825	1.812	1.662

**Table 4. The Regression Results on Expatriate Performance**

Independent Variables	Dependent Variable – Expatriate Performance								
	Task Performance			Contextual Performance			Overall Performance		
	M1	M2	M3	M4	M5	M6	M7	M8	M9
<i>Expatriate Characteristics</i>									
- Expatriate competence	0.582***			0.582***			0.448***		
- Adaptability	0.253***			0.275***			0.371**		
<i>Expatriate Task Assignment</i>									
- Challenges		0.626***			0.636***		0.675***		
- Capability		0.009			0.081		0.032		
<i>Cross Cultural Differences</i>									
- Power distance			0.086			0.301***			0.194*
- Uncertainty avoidance			-0.016			-0.097			0.060
- Individualism			0.130 <sup>+</sup>			0.116 <sup>+</sup>			0.210**
- Masculinity			0.252**			0.207**			0.126
- Confucius dynamics			0.419***			0.376***			0.292***
$R^2$	0.640	0.400	0.645	0.686	0.482	0.690	0.620	0.487	0.632
Adjusted $R^2$	0.636	0.394	0.637	0.683	0.477	0.683	0.616	0.482	0.625
F-value	190.786	71.606	77.177	235.038	99.925	94.581	175.255	101.868	72.855
P (sig.)	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
D-W	1.861	1.629	1.821	1.827	1.543	1.647	1.733	1.634	1.887

Following previous results, Confucius dynamics exhibited significant effects on the expatriates' performance. The power distance indicated significant influence on contextual and

overall performance, and the individualism factor has significant relationship with contextual and overall performance. In addition, the masculinity factor has significant influence on task and contextual performance. Therefore, Hypothesis 3-c is modestly supported in this study.

Table 5 reported the effects of expatriate adjustment on expatriate operational capability. The general and work adjustment indeed significantly affects their ability in the expatriation assignment at the 0.1% level. Interestingly, the interaction adjustment indicated significant effect on the ability of expatriate to maintain their stress level while doing their job abroad, whereas the ability to have relation and communicate with local people has not affected by the level of interaction adjustment. The reason is most of the respondents have expatriation more than 3 countries which most of these expatriates are in Asia region, they do not have difficulties to develop relations with local partners. Moreover, they have enough capabilities to communicate with their host co-workers. Thus, Hypothesis 3 is only partially supported.

**Table 5. The Regression Results on Expatriate Operational Capability**

<i>Independent Variables</i>	<i>Dependent Variable – Expatriate Operational Capability</i>		
	Stress Tolerance M19	Relational Ability M20	Communicational Ability M21
<i>Expatriate Adjustment</i>			
- General adjustment	0.489***	0.278***	0.440***
- Work adjustment	0.252***	0.537***	0.272***
- Interaction adjustment	0.190**	0.103	0.150
$R^2$	0.786	0.768	0.674
Adjusted $R^2$	0.783	0.765	0.669
F-value	261.678	236.202	147.320
P (sig.)	0.000	0.000	0.000
D-W	1.827	1.868	1.838

Table 6 tested the Hypothesis 5 and Hypothesis 6. The results indicated that expatriate adjustments have significant influence on the level of their performance in abroad, which confirm the Hypothesis 5. As proposed by Hypothesis 6, the results of Table 6 revealed that expatriate operational capability has influence on expatriate performance, and only communicational ability does not have influence on overall performance, even though the task and contextual performance affected respectively. Similar with previous argument, since most of the expatriates who joined this study assigned in Asian countries, the language problem or cultural differences may not be the main concern for them. Therefore, expatriates' capability to communicate with local partners is not major determinants on their overall performance, even though on task performance as well on contextual performance, this ability has significant influence. Thus, Hypothesis 6 only partially supported.

**Table 6. The Regression Results on Expatriate Performance**

<i>Independent Variables</i>	<i>Dependent Variable – Expatriate Performance</i>					
	Task Performance		Contextual Performance		Overall Performance	
	M22	M23	M24	M25	M26	M27
<i>Expatriate Adjustment</i>						
- General adjustment	0.252**		0.294***		0.194*	
- Work adjustment	0.401***		0.401***		0.304***	
- Interaction adjustment	0.200**		0.204*		0.345***	
<i>Expatriate Operational Capability</i>						
- Stress tolerance		0.257***		0.181*		0.252**
- Relational ability		0.361***		0.477***		0.490***
- Communicational ability		0.308***		0.280***		0.138
$R^2$	0.657	0.775	0.729	0.800	0.641	0.708
Adjusted $R^2$	0.652	0.772	0.725	0.798	0.636	0.704
F-value	136.359	245.411	191.837	286.117	127.318	173.244
P (sig.)	0.000	0.000	0.000	0.000	0.000	0.000
D-W	1.862	1.643	1.850	1.622	1.948	1.519

In order to test the Hypotheses 7 that expatriate training moderate the effects of independent variables on dependent variables, the study adopts by using ANOVA (Hair, et al., 2006). Six separate models were estimated; each tested the join effects of the independent variables with expatriate training. For expatriate assignment, this study uses the mean score of each construct as cut point, which is divided into two levels, high and low level. Since each construct has more than 1 factor, this study combines it as one construct by testing the Cronbach's Alpha, which ranging from 0.863 (for expatriate characteristics) to 0.963 (for expatriate training). For the dependent variables (expatriate adjustment, operational capability, and performance), this study uses the same procedure. The Cronbachs' Alpha for the combination of three types of adjustment is 0.872, three factors of operational capability is 0.885, and performance is 0.922.

Table 7 reported that the expatriate training moderate the effects of expatriate characteristics and expatriate task assignment on expatriate adjustment and expatriate operational capability. Moreover, Figure 2 depicted the effects of training on the influence of expatriates' characteristics, task assignment and cultural differences on the dependent variables. It can be seen that the entire figure indicated that higher training received by expatriates has superior impacts than lower training on three dependent variables: expatriate adjustment, operational capability, and performance. Thus, Hypothesis 7 is supported.

**Table 7. Moderating Effects of Expatriate Training**

<i>Independent X Moderating Variable</i>		<i>Dependent Variable</i>					
		Expatriate Adjustment		Expatriate Operational Capability		Expatriate Performance	
<i>Expatriate Task Assignment X Expatriate Training</i>							
		Mean	SD	Mean	SD	Mean	SD
1	High ETA, High ET (n=79)	5.841	0.687	5.887	0.757	5.914	0.648
2	High ETA, Low ET (n=25)	4.921	0.663	5.023	0.679	5.049	0.626
3	Low ETA, High ET (n=37)	4.914	0.574	4.815	0.543	4.955	0.576
4	Low ETA, Low ET (n=77)	4.003	1.040	4.052	1.085	4.022	1.076
F		66.409		60.526		70.176	
P		0.000		0.000		0.000	
<i>Expatriate Characteristics X Expatriate Training</i>							
1	High EC, High ET (n=77)	5.760	0.707	5.747	0.763	5.772	0.674
2	High EC, Low ET (n=23)	4.742	0.660	4.973	0.603	4.802	0.645
3	Low EC, High ET (n=39)	5.121	0.755	5.146	0.899	5.285	0.847
4	Low EC, Low ET (n=79)	4.079	1.081	4.091	1.112	4.120	1.132
F		50.025		43.233		46.424	
P		0.000		0.000		0.000	
<i>Cross-Cultural Differences X Expatriate Training</i>							
1	High CCD, High ET (n=55)	5.692	0.744	5.737	0.786	5.794	0.680
2	High CCD, Low ET (n=49)	4.844	0.413	4.903	0.590	5.049	0.600
3	Low CCD, High ET (n=37)	5.009	0.686	4.847	0.738	4.933	0.698
4	Low CCD, Low ET (n=77)	4.114	1.079	4.176	1.116	4.129	1.087
F		48.462		42.882		54.919	
P		0.000		0.000		0.000	

**Table 8. Moderating Effects of Social Support**

<i>Independent X Moderating Variable</i>		<i>Dependent Variable</i>					
		Expatriate Adjustment		Expatriate Operational Capability		Expatriate Performance	
<i>Expatriate Task Assignment X Social Support</i>							
		Mean	SD	Mean	SD	Mean	SD
1	High ETA, High SS (n=73)	5.936	0.625	6.021	0.615	5.998	0.603
2	High ETA, Low SS (n=31)	4.874	0.597	4.875	0.684	5.018	0.556
3	Low ETA, High SS (n=31)	4.925	0.598	4.939	0.640	5.029	0.636
4	Low ETA, Low SS (n=83)	4.065	1.033	4.061	1.018	4.062	1.039
F		70.852		76.979		76.460	
P		0.000		0.000		0.000	
<i>Expatriate Characteristics X Social Support</i>							
1	High EC, High SS (n=76)	5.768	0.717	5.813	0.707	5.787	0.687
2	High EC, Low SS (n=24)	4.760	0.620	4.797	0.531	4.796	0.555
3	Low EC, High SS (n=48)	5.273	0.806	5.388	0.939	5.500	0.898
4	Low EC, Low SS (n=90)	4.159	1.045	4.145	1.056	4.195	1.083
F		48.786		51.565		47.910	
P		0.000		0.000		0.000	
<i>Cross-Cultural Differences X Social Support</i>							
1	High CCD, High SS (n=89)	5.716	0.744	5.793	0.734	5.815	0.688
2	High CCD, Low SS (n=18)	4.820	0.292	4.718	0.574	5.025	0.463
3	Low CCD, High SS (n=15)	5.151	0.769	5.137	0.929	5.081	0.856
4	Low CCD, Low S (n=96)	4.185	1.053	4.201	1.048	4.190	1.047
F		47.579		49.978		54.590	
P		0.000		0.000		0.000	

Hypothesis 8 proposed that the level of social support will moderate the effects of expatriate characteristics, task assignment, and cross-cultural differences on the dependent variables. The Table 8 presented that the higher the social support, the higher the dependent variables will be, regardless the level of individual variables (expatriate characteristics), types of assignment, as well as the differences of cultural between the home and host country.

Moreover, Figure 3 further indicated that expatriate's tend to perform higher in terms of expatriate adjustment, operational capability and expatriation performance under high support category than lower support category.

## **V. Conclusions**

There are two major objectives of this study. First is to determine the influence of expatriate characteristics, expatriate task assignment and cross-cultural differences on expatriate adjustment, operational capability, as well as expatriation performance. The second objective is to evaluate whether communication, cognitive, and experiential training and social support moderates these relationship. Based on the results of this study, several conclusions can be drawn.

The first conclusion that can be addressed from this study is that the expatriates' characteristic and their degree of adaptability have significant influence on their adjustment, operational capability, and expatriation performance. These results are in line with those of previous studies, for example, Black et al. (1999) and Downes et al. (2002) concluded that the selection of expatriates by focusing on their competencies and their willingness to adapt into new culture are important determinants on the success of expatriation. Moreover, the degree of challenges perceived by expatriates can better predict on their success, whereas their perception on the local manager's capability revealed mixed results. Their study result also indicated that host capability indeed has influence on the expatriate's general adjustment and the interaction adjustment. It implies that only when a closer gap of capabilities between expatriates and host partner can the headquarter expect higher effectiveness level on their expatriates.

Furthermore, this study also confirmed previous results (e.g., Kraimer, 2001; Stahl and Caligiuri, 2005) that the degree of adjustment has influence on expatriate operational capability as well as expatriates performance. The second conclusion that can be drawn from this research is that training will enhance the probability of expatriates to adjust better, with higher

operational capability and expatriation performance. The study confirmed current results (e.g., Downes et al., 2002; Lee and Crocker, 2006). Moreover, the support from organization, leaders, and spousal support also moderate the effects of expatriates' characteristics, task assignment and cross-cultural difference on expatriate adjustment, operational capability and expatriation performance. The major rationale may lie in the idea that various kinds of support will enable expatriates to have more confidence and more communication channels to adjust and perform successfully in the overseas marketplaces.

Several implications could be drawn from these conclusions. First, the conclusions of this study indicate that expatriate characteristics, expatriate task assignments, and cross-cultural differences all have significant impact on expatriate adjustment and their operational capability. It is important to evaluate the role of expatriate training on prompting their adjustment and operational capability. Furthermore, it is important to evaluate the influence of expatriate adjustment on operational capability and expatriate effectiveness. For human resource managers in headquarters and subsidiaries, it is critical for them to arrange appropriate people to certain position, and after that to provide appropriate training courses that can enable expatriates to promote their adjustment and operational capability, and consequently their overall expatriate performance can be expected.

### **Future Research Directions**

Although this research is not exhaustive in nature, it does examine a subset of possible variables and represents an incremental step toward better understanding the complex phenomenon of what is the role of expatriates characteristics and task assignment on the success of expatriation. Some recommendations are provided for future research. First, since this study adopts a cross-sectional research design and examines the opinions of expatriates at one point in time, directional relationships may be not clear. It is recommended for future research to conduct out longitudinal studies which test the findings of this study. Second, due to the constraint of time and resources, the samples of this study are limited to expatriates for Taiwanese firms in Asian countries. The generalization of the study results should be interpreted with appropriate caution. It is recommended that the same questionnaire, or an abbreviated form, could be used for Taiwanese expatriates or other country's expatriates in other countries, or particularly when the cross-cultural differences are different, such as North American countries or European countries. The additional efforts will further confirm the validity and generalizability of the findings in this study.

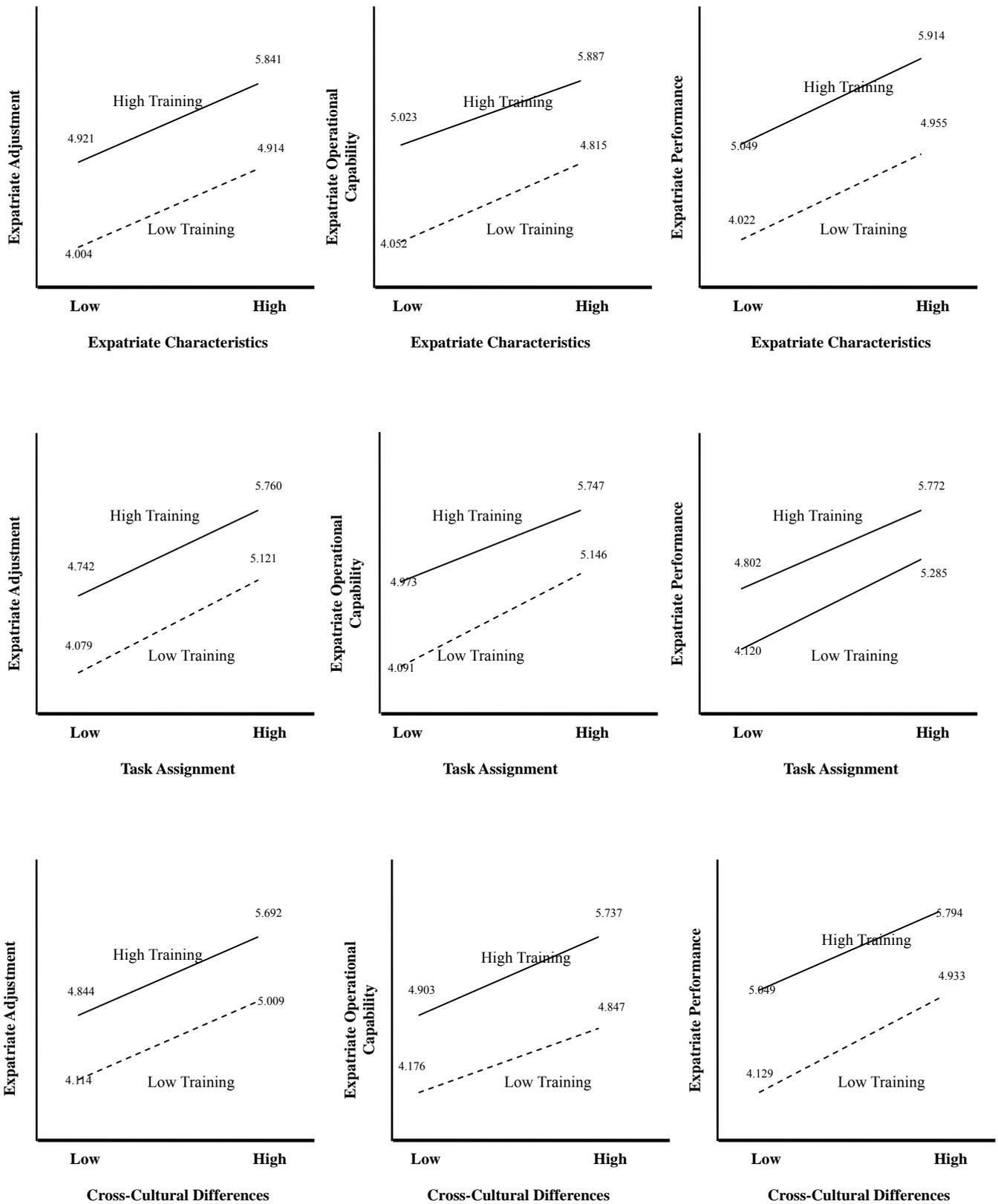


Figure 2. The Moderating Effects of Expatriate Training

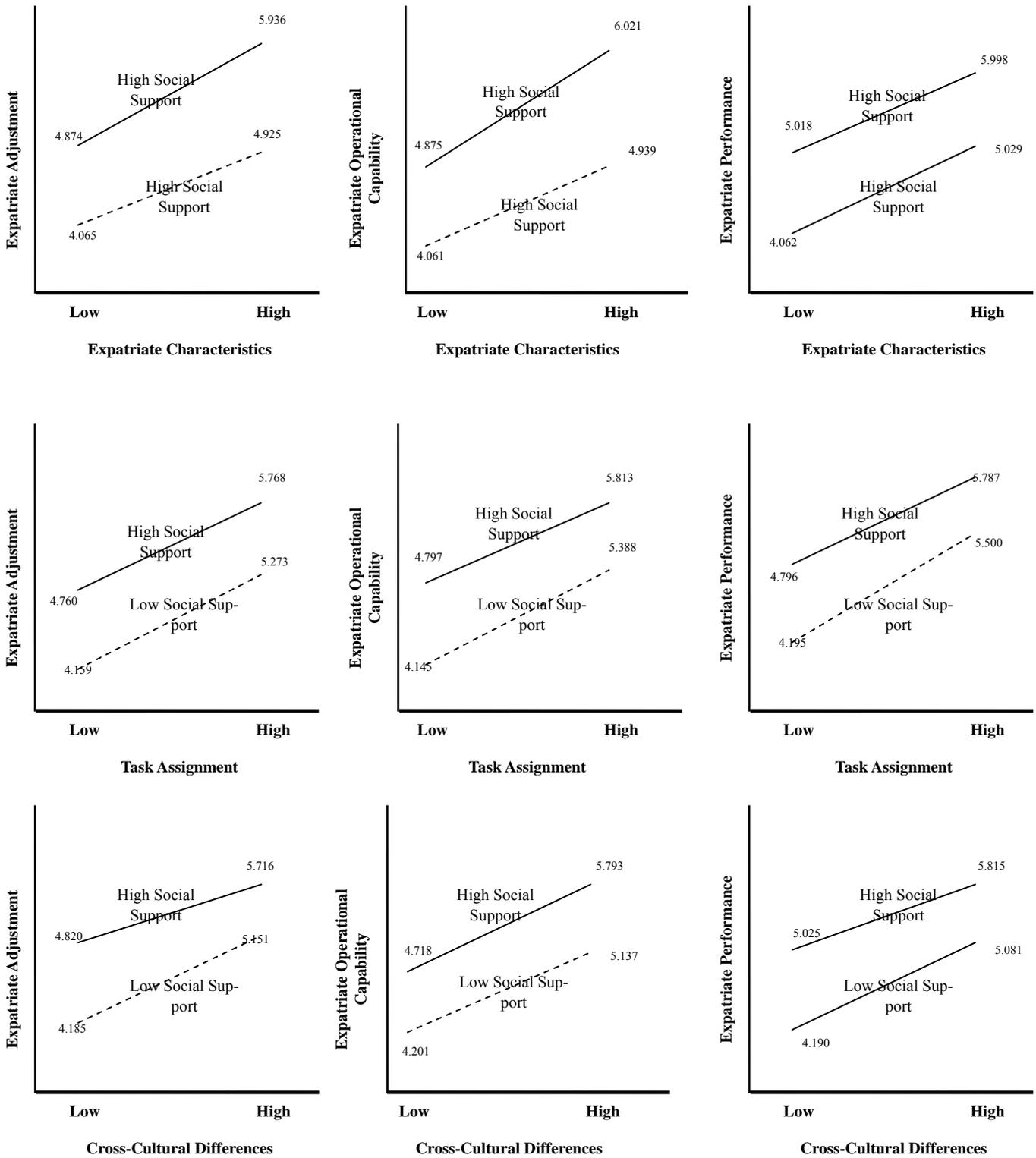


Figure 3. The Moderating Effects of social support

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