JOURNAL OF INTERNATIONAL BUSINESS RESEARCH

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CORPORATE PREPARATION FOR THE CROSS-CULTURAL ADAPTATION EXPERIENCE OF THE ACCOMPANYING EXPATRIATE SPOUSE

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ABSTRACT

Scholars have long concurred that the cross-cultural adaptation experience of an expatriate employee will have a significant impact on the overall success or failure of an international assignment. While there has been discussion in the literature of the impact of the cultural adaptation of the accompanying expatriate spouse on the assignment success, little extant literature has systematically applied existing adaptation theory to consider how companies can provide support programs to aid in this journey of spousal cultural adaptation. In this paper, the author argues through the application of Social Learning Theory that the sponsoring organization can help prepare the accompanying expatriate spouse with targeted programs that aid in anticipatory cultural adjustments.

INTRODUCTION

Corporate globalization has created the need for internationally mobile employees to act as emissaries of their corporations in far-flung locations. By placing expatriates in international work roles, companies have created the necessity to understand how best to prepare these individuals and their accompanying families for the culture shock of integrating into a new environment. Expatriates are typically being introduced to a completely new set of cultural mores and experiences and therefore have little knowledge of how to behave and interact effectively with their host culture (Harvey & Moeller, 2009). Inappropriate behavior can have negative consequences for the corporation in the form of hampered client relationships, missed opportunities, and a diminished company reputation.

The typical overseas assignment usually sees a male employee relocating, bringing with him his wife and children (Brookfield GRS, 2010; Haslberger, 2010). The expatriate wife is known as the accompanying (or trailing) spouse, as she gives up her home, social network, and perhaps career to follow the interests of her husband's career. Studies have shown that the acculturation of the family unit (Harvey, Napier, & Moeller, 2009), and particularly the accompanying spouse (Kupka & Cathro, 2007; Lauring & Selmer, 2010), has a marked effect on the overall success of the overseas assignment.

As expatriates are often assigned to a location that is culturally disparate from their home country, both the expatriate and the expatriate family unit are confronted with an alien culture, necessitating the need for the assistance of both formal and informal support systems to aid in the acculturation process. With the expatriate spending the bulk of their time occupied with work concerns, spearheading the family's cultural adjustment is often left to the accompanying spouse (Kupka & Cathro, 2007). If the spouse is not progressing towards successful acculturation themselves, they will be ineffective in both assisting with other family members' adjustment as

well acting as a positive influence for the employee (Bikos et al., 2007). If the spouse is not a positive influence for the employee, this can compromise the success of the assignment, which has ramifications not only for the expatriate family (Van Der Zee, Ali, & Haaksma, 2007), but also for the sponsoring organization (Osman-Gani & Rockstuhl, 2008).

As the process of globalization and the internationalization of business becomes a more regular feature of professional and managerial life, an understanding of the impact of living and working in an alien culture becomes all the more critical. The construct of cross-cultural adaptation has been well-researched and promulgated in the past three decades. From history books, one can glean how conquerors of different lands have imposed their cultural background on their conquests because of their refusal to adapt to the culture of the natives. Therefore, the need to fully understand the process of cross-cultural adaptation is critical to ensuring the personal and professional success of corporate expatriate assignments.

While past research acknowledges that globalization has required multinational corporations to improve their global human resource systems, most have failed to do just that (Puck, Kittler, & Wright, 2008). Many organizations are still insensitive to the effect of family issues on expatriate assignments, resulting in increased stress for the families making involuntary relocations without adequate support from sponsoring organizations (Harvey et al., 2009).

This repeated and admitted failure by organizations to successfully execute expatriate policies in the areas of selection, support, and retention has incurred losses in both financial and human resources (Harvey & Moeller, 2009). Expatriate failure rates in US organizations are significant, ranging from 16% to 40% (Brookfield GRS, 2010) and costing from $50,000 to $200,000 per premature return (Brookfield GRS, 2010; Harvey & Moeller, 2009). Moreover, of the approximate two-thirds of expatriates that do not return early, about half are considered by their sponsoring organization to be ineffective in their assignment (Harvey & Moeller, 2009). Taking into account that the cost of supporting an overseas employee is approximately $300,000 per annum (Harvey & Moeller, 2009), the costs of an ineffective expatriate are actually higher than a failed one.

However, failure is not the paramount concern when selecting expatriates. Sometimes it can be difficult to get employees to agree to an international location in the first place. The number one reason that an employee refuses an assignment is due to family concerns (Brookfield GRS, 2010). Furthermore, the single most critical issue facing sponsoring organizations is spousal resistance. If the spouse is not "on board", the entire assignment could be destined to failure before departure has even occurred.

Brookfield GRS (2010) found that assignment failure is most often due to three main reasons: spouse/partner dissatisfaction, family concerns, and inability to adapt. These reasons far outweighed other causal factors in terms of expatriate assignment failure. Further understanding of these areas by sponsoring organizations could lead to revised support programs, and, in turn, potentially reduced assignment failure rates, provided sponsoring organizations are prepared to be persuaded. But before these practical measures can be put in place, an understanding of the theoretical underpinnings of cultural adaptation is necessary.

Components of cross cultural adaptation

Haslberger defined cross-cultural adaptation as a "complex process in which a person becomes capable of functioning effectively in a culture other than the one he or she was originally socialized in" (2005, p.86). Despite this seemingly simplistic definition, cross-cultural

adaptation as a concept has multi-faceted dimensions. For example, Gudykunst and Hammer (1987) defined cross-cultural adaptation as 'state adaptation', or, in other words, the degree of fit between the individual and his/her environment. Based on this definition, adaptation is not static and may fluctuate from bad to good and back (Waxin & Panaccio, 2005). Most frequently, cross-cultural adaptation is a process of acculturation of the newcomer as well as the convergence over time of behaviors, values, norms, and underlying assumptions of the individual with those prevailing in the environment.

Yu, Yi, Chiao, and Wei (2005) viewed adaptation as having two components: adjustment and assimilation. Adjustment has been defined as "the degree of psychological comfort of an individual with several aspects of a new environment" (Waxin & Panaccio, 2005, p.52). Puck et al. (2008) viewed assimilation as the acceptance of the host culture coupled with the ability to act comfortably within the social confines of the culture. One might conclude that the presence of both desired components would definitely ease the stress undergone by sojourners grappling with a different culture from their own.

Yu et al. (2005) classified adaptation into adjustment, reaction, and withdrawal. In order to reconcile the conflict between an individual's behaviors and host culture, there must be an adjustment of behaviors to conform to the host environment. This is consistent with the old adage "When in Rome, do as the Romans do." Reaction occurs when an individual modifies his or her behavior in response to the host environment. This behavior modification can result in changes in the response of the host environment to the individual. An example of this is a tourist's negative reaction to the taste of the host country's food. In the name of hospitality, the hosts will exert effort to please the tourist by not serving its native dishes and instead search for foods more to the tourist's preferred tastes.

The passive response of withdrawal is an inert reaction to the pressures of fitting in to the host culture, which implies that the individual has abdicated active participation in attempting to adapt to the new environment. An example is physically isolating oneself from the cultural group, such as a newcomer locking himself away to avoid socializing with both natives and other expatriates. Berry (as cited in Yu et al, 2005, p.189) concludes "that both reaction and withdrawal are usually unworkable and the only feasible strategy in the process of adaptation is adjustment."

Much of the academic research in the field of cross-cultural adaptation has been theoretical (for example, the seminal work of Black, Mendenhall, & Oddou, 1991). Research has centered more on an unsystematic search for factors that influence the adaptation process as opposed to a systematic identification of factors that influence the adaptation process and a theoretical explanation of that process.

In an international assignment, the expatriate worker and his family go through various adaptation dynamics (Hocking, Brown, & Harzing, 2007; Insch, McIntyre, & Napier, 2008), and it is possible that each member goes through it at differing levels and at different speeds. The degree of difficulty in the adjustment of the expatriate worker to a different culture may affect his commitment to stay on for the duration of his assignment or his early return to his home culture (Black & Mendenhall, 1991). This idea gives rise to the observation that the research is indeed unsystematic to the different elements of adaptation as identified by the various researchers, described in detail in the below section.

Spousal adjustment

An important factor that has a direct impact on expatriate adjustment is spousal adjustment since the spouse has a great influence over the expatriate worker (Takeuchi, Lepak, Marinova, & Yun, 2007). It may be concluded that the general works on cross-cultural adaptation already referred to offer pertinent messages in relation to spousal adjustment, but there is also an extant body of work that relates specifically to this aspect of the subject. As a starting point, Lazarova, Westmand and Shaffer (2010) identified the significant predictors of spouse adjustment as culture novelty, comparable living conditions, support satisfaction, and perceived family support.

The recognition of the great impact that the cultural adjustment of the expatriate spouse has on the adjustment and performance of the employee expatriate has caused a number of researchers to explore the issue. The first attempts to investigate the level of the expatriate spouse's adjustment were made by Black and Mendenhall (1991) and more recently by Lazarova, Westman, & Shaffer (2010). Black and Mendenhall (1991) suggest a model of spousal adjustment which includes 'general living adjustment' and 'interaction adjustment' as facets of adjustment.

Most spouses undergo some drastic changes in lifestyle. For example, their general living adjustment may either be a few steps up or a few steps down from the standard of living to which they were accustomed in their home country. Aside from that, they have no choice but to interact with a variety of personalities that may differ from their own mold. Mohr and Klein (2004) added the facet of 'role adjustment', considering spouses take on a different role overseas as they are faced with new tasks, identities, and expectations (Van Der Zee, Ali, & Salomé, 2005). Some have previously been employed in their home country and then suddenly find themselves as housewives or the other way around.

Mohr and Klein (2004) identified twelve factors that may foster or hinder spousal adjustment arising from their investigation of the cross-cultural adaptation of American expatriate spouses in Germany. These factors include: age, children, knowledge of host country language, previous international experience, motivation, openness, degree of participation in the company decision-making process, perceived cultural distance/culture novelty, pre-departure cultural training, interaction with host-country nationals, length of stay, and adjustment of the spouse whom has taken the expatriate contract.

Lazarova et al. (2010) added personal adjustment to the litany of related adaptation factors of spouses. Personal adjustment was tied to several factors, one of which was the attempt to learn the host country language. Their findings indicated that spouses who had positive experiences in their host country had knowledge of its native language while those who had negative experiences did not attempt to learn it. The skill of language proficiency somehow affects the self-concept of the individual.

Spouses who were previously employed before the expatriation and then underwent a role shift into becoming "just" housewives of the expatriate workers had an increased need to reform their sense of self (Bikos, et al., 2009; Herleman, Britt & Hashima, 2008). On the other hand, when spouses were able to transport their work life to the host country, there was not the same need for a new identity, which made the adaptation process easier overall.

Yu, et al. (2005) studied the Asian perspective regarding spousal adaptation. Their model of adaptation of Taiwanese expatriate spouses on foreign assignments focused on dimensions of expatriate acculturation such as cultural flexibility, social orientation, a willingness to

communicate, ethnocentricity, and conflict resolution orientation, and orientation towards knowledge. It was found from the case interviews conducted by Yu, et al. (2005) that when Taiwanese expatriate spouses have high cultural flexibility, high social orientation, a high willingness to communicate, low ethnocentricity, and a high orientation towards knowledge, they tend to interact more with local nationals and adapt to the foreign life more readily.

Like the findings of Lazarova et al. (2010), if spouses cannot adapt well, two responses might occur: they may form a small social group with other expatriate spouses from the same country and their social activities may very well be with the people in such a group (i.e., 'reaction') (Templer, Tay, & Chandrasekar, 2006). However, if a social group cannot be formed, the spouse will likely spend most of their time at home, thereby restricting the possibility of their coming in contact with the external environment (i.e., 'withdrawal').
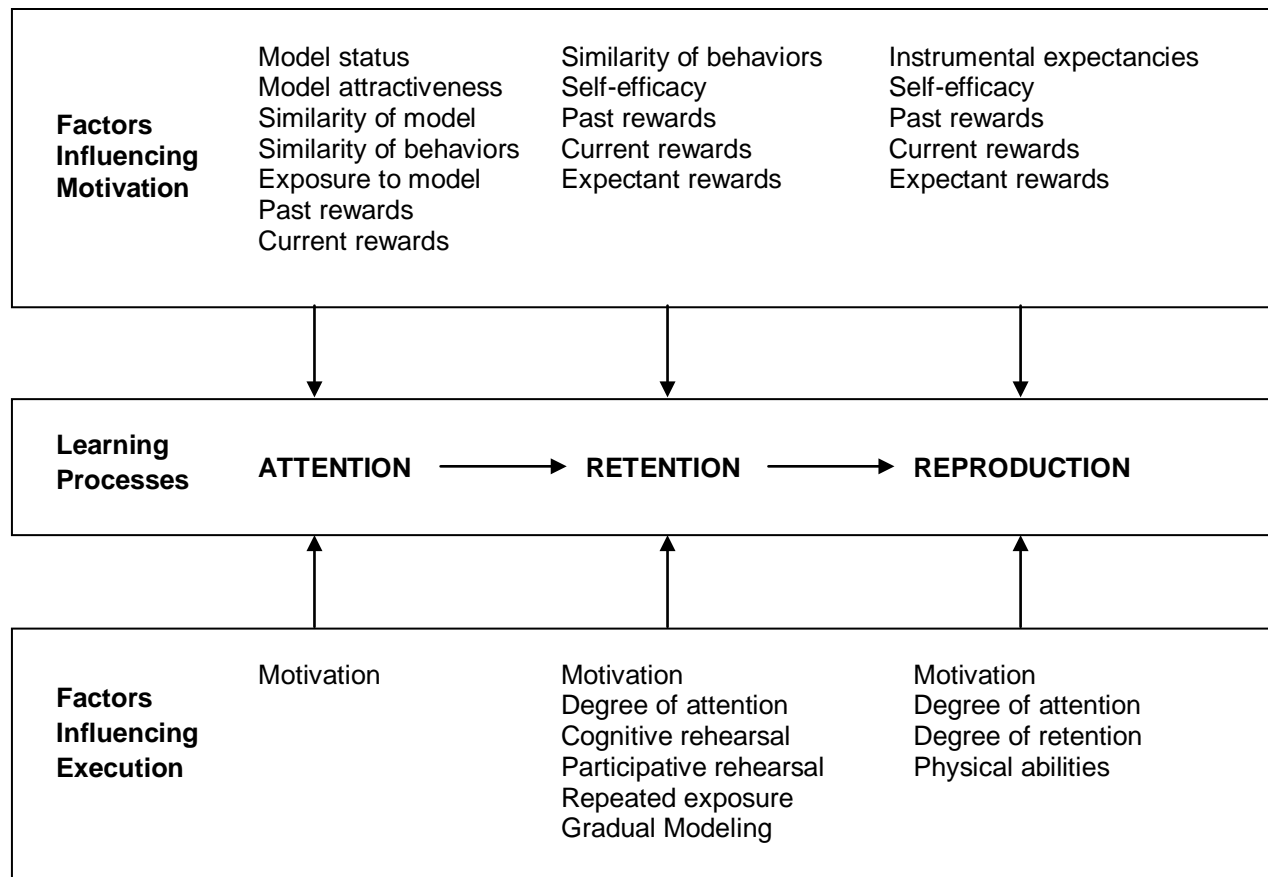
Social Learning Theory

Companies sponsoring expatriate assignments are faced with both an acknowledgement of the difficulties of spousal adaptation yet precious little in terms of practical assistance. In order to move from acknowledgement to assistance, it is imperative that companies understand not just that spouses *must* adapt for an assignment to be successful but also *how* that adaptation can be supported and progressed by the company.

Past research in the area of learning theory has been organized in two primary frames of reference: cognitive and behavioral. Cognitive theories of learning postulate that learning is a result of the mental processing of information coupled with the determination to execute the newly learned behavior. On the other hand, behavioral theorists believe learning is a result of behavior, its consequences, and the association made between the two by the individual (Zhou, Jindal-Snape, Topping, & Todman, 2008). But neither theory can stand alone as the preeminent theory of learning because neither theory can be truly tested. Thus, a balance must be struck between these competing theories to more fully understand the way in which an individual learns.

This balance can be found in Social Learning Theory (SLT, see figure 1), which is a marriage of cognitive and behavioral learning theories, and many researchers believe SLT is a superior learning theory for this reason. SLT is a compromise point on most facets of learning, and some researchers (Sulsky & Kline, 2007) view SLT as a logical amalgamation of cognitive and behavioral learning theory. Therefore, SLT can be applied to aid the understanding of the theoretical underpinnings of cultural adaptation.

Social learning theorists believe that individuals can learn based on the consequences of their own behavior, but that they can also learn by observing the behavior and associated consequences of others and imitating the behavior. Individuals possess 'anticipatory control', meaning that they can choose how to react in future situations. SLT has four central elements: attention, retention, reproduction, and incentives and motivational processes (Bandura, as cited in Sulsky & Kline, 2007).

In order to learn from modeling someone else's behavior, an individual must first notice, or have their attention called to, that person (Toh & DeNisi, 2007). Bandura (as cited in Gleason, Iida, Shrout, & Bolger, 2008) identified several elements that influence an individual's attention: (1) the status of the model; (2) the attractiveness of the model; (3) the similarity of the model; (4) the repeated availability of the model; and (5) past reinforcement for paying attention to the model (actual or vicarious).

Factors Influencing Motivation	Model status Model attractiveness Similarity of model Similarity of behaviors Exposure to model Past rewards Current rewards	Similarity of behaviors Self-efficacy Past rewards Current rewards Expectant rewards	Instrumental expectancies Self-efficacy Past rewards Current rewards Expectant rewards
Learning Processes	**ATTENTION** ⟶	**RETENTION** ⟶	**REPRODUCTION**
Factors Influencing Execution	Motivation	Motivation Degree of attention Cognitive rehearsal Participative rehearsal Repeated exposure Gradual Modeling	Motivation Degree of attention Degree of retention Physical abilities

Figure 1. Model of Social Learning Theory Process (Black & Mendenhall, 1991)

Retention refers to the process of encoding observations into the memory of the observer. This is done through two systems, imaginal and verbal. The imaginal system is utilized when the individual observes the behavior and records these sensory images as 'cognitive maps', which can then be recalled to remember the behavior. The verbal system is utilized when the individual groups observed verbal cues together in integrated units. Both the repeated modeling of a behavior and the repeated cognitive rehearsal of the behavior serve to solidify retention.

Reproduction refers to the process of the individual recreating the modeled behavior. During the reproduction process the individual will constantly check their actions against those of their memory of the modeled behavior. This process can result in variations from the original behavior dependent upon how well the observer remembers the behavior. Also, there will be differences between the observed behavior and the reconstructed behavior due to physical and mental disparities between the model and the person recreating the model.

Incentives create motivation in the individual to model behavior. Incentives can stem from three primary areas: the direct external environment (e.g., a dog receives a treat every time it follows its master's command), vicarious association (e.g., the dog sits when it sees its master as it associates this correctly executed command with receiving a treat), and from within the individual themselves (e.g., the dog feels hungry so is motivated to go to its food bowl in order to satisfy its need).

Incentives have a great effect on an individual's motivation to learn and/or repeat a certain behavior (Zhou et al., 2008). For example, they can affect which models are observed and how closely attention is paid to a particular model, as well as influencing the level to which the observed behavior is preserved and reviewed and acted out. Bandura's empirical work led him to believe that incentives greatly influence which behaviors are explicit as opposed to just learned. He postulated that an individual can learn many behaviors, but will only act out select behaviors to either achieve positive consequences or to avoid negative ones.

Bandura (as cited in Sulsky & Kline, 2007) identified two types of expectancies with regards to motivational learning processes: efficacy expectations and outcome expectations. Self-efficacy is the degree to which the individual believes they can successfully execute a particular behavior. Individuals with higher levels of self-efficacy will persist longer in attempts to duplicate behavior and will attempt to duplicate more novel behavior. Bandura found that self-efficacy is increased by past experience, vicarious experience, and verbal persuasions. This expectation closely matches Vroom's "effort to performance" expectancy in his expectancy theory of motivation.

The second type of expectancy that Bandura proposes as linked to motivational processes is outcome expectancy. Outcome expectancies are related to the individual's belief that certain types of behaviors will result in specific outcomes. Bandura's outcome expectancies are similar to Vroom's "expectancy-to-performance-of-outcomes" aspect of his work in expectancy theory of motivation. Bandura believed that while attention, retention, and reproduction played an essential role in the learning process, incentives sway what behaviors individuals learn, and that incentives and expectancies combined influence which of learned behaviors are executed.

In developing his theory of social learning, Bandura (as cited in Sulsky & Kline, 2007) made several important empirical findings. First, he found that gradual modeling is more valuable than 'one-shot' modeling, particularly when an individual is observing novel behavior. With gradual modeling, the observer progressively observes a behavior. Bandura makes this assertion based on four principles of SLT: (1) observers take notice of models and behaviors that are recognizable; (2) observers find it easier to remember models and behaviors that are already stored as cognitive maps; (3) more familiar behaviors produce greater efficacy and outcome expectations in the observer; and (4) observers are more likely to replicate more familiar activities.

A second key empirical finding is that individuals can successfully learn a behavior through symbolic modeling. Just by observing and mentally practicing, an individual can effectively learn a behavior. The success of symbolic modeling as a learning tool is enhanced by other previously mentioned variables such as attractiveness and similarity of the model, as well as repeated observation.

A third important empirical finding is that participative reproduction is usually more effective than symbolic modeling alone. The chances of successful execution of a modeled behavior are increased if the observer physically rehearses the action as opposed to solely mentally rehearsing it. Physically rehearsing the behavior allows for external feedback, which can help the observer refine his behavior to more closely match that of the model.

Because individuals are aware of the consequences of their own behavior and the consequences of the behavior of those around them, they can form symbolic and vicarious links between behavior and consequence (Black & Mendenhall, 1991). These links can then be transformed into cognitive maps that can be used to predict consequences about future behavior. In the perspective of cross-cultural adjustment where an individual is confronted with new

behaviors and no relevant cognitive maps to aid in prediction of consequences, SLT can provide useful insight into whether adjustment will progress.

Introduction to the host country

During the initial phase of acculturation, individuals, including a trailing spouse, are likely to make many cultural errors. However, they do not notice these errors or the associated negative consequences for several reasons. First, the short time frame that the individual has been in the new host country means that, although they may commit many behavioral mistakes, they will not have had enough time to accumulate enough errors to begin associating behavioral mistakes with negative consequences. It is a build-up of time and gradual association between behavior and consequence that moves the individual from naïve wonderment about how different the new culture is to one of potential dissatisfaction and resentment.

Black and Mendenhall (1991) postulated that in the initial introduction to a new culture, individuals will report the lowest level of cultural differences between themselves and locals. This is due to the short amount of time in which the individual has had to identify major cultural divergences. Moreover, the negative consequences linked to inappropriate behavior will probably be different than what the individual is used to in their home culture, so it will take time before they can begin to recognize negative consequences as a result of their own or someone else's behavior. Since individuals have a need to preserve their own self-concept, so they might fail to see they are committing incorrect acts as they ignore negative feedback so as to preserve their prior self-concept.

Culture shock

What happens when the novelty of the new culture gives way to an acute awareness that 'different' feels less exotic and more isolating? The rising awareness of negative consequences resulting from inappropriate behavior coupled with a lack of understanding as to appropriate behaviors leads to anger, anxiety, and frustration, which are classic emotions one experiences during culture shock (Black & Mendenhall, 1991).

Several factors influence which models an individual observes and how much attention is paid to each model. These factors include attractiveness, repeated availability, importance, and similarity of the model. Typically individuals are drawn to models that are similar to themselves and thereby more attractive. The amount of divergence between the home and host country, or what some researchers (Selmer, Chiu, & Shenkar, 2007; Tihanyi, Griffith, & Russell, 2005) have referred to as 'cultural distance', will have an impact on which models the individual finds attractive and therefore notices. The greater the cultural distance between the home and host cultures, the less likely it is that an individual will seek to model local behavior (Black & Mendenhall, 1991; Stahl & Caligiuri, 2005). This rejection can increase the duration and degree of culture shock experienced.

Selmer et al. (2007) concluded that the greater the differences between home and host culture, the greater the difference between the individual's perceptions of appropriate behavior to local perceptions of appropriate behavior. This rejection of appropriate host country behavior results in culture shock because it increases the negative consequences and reactions aimed at the individual. This, in combination with the fact that the individual has not had enough time in the new environment to find and model other locals' behavior repeatedly means that they are left

with negative reactions but no idea as to how to behave appropriately in order to stop the negativity. Again, this results in frustration, anger, and anxiety. However, the increasing amount of time spent in the host country will allow individuals to identify and observe models, from which they can begin to form more appropriate behavior patterns, thereby moving them into phase three of the adaptation process.

During the adjustment phase, individuals begin to recognize and execute modeled behavior, as this is the point where they have had an opportunity to identify, pay attention to, and repeatedly observe behavioral models. So it is at this point that performing these modeled behaviors begins to result in positive interactions and consequences and mitigate negative ones. The new positive consequences serve as reinforcement of the new learned behaviors, which, after a certain amount of repetition, will lead to increased comfort with the host culture.

Anticipatory adjustment

SLT introduces the concept of anticipatory adjustment, meaning that, because individuals can learn vicariously, they can make anticipatory adjustments for interacting in their host culture before they even arrive (Sobre-Denton & Hart, 2008). These pre-departure adjustments can have an impact on the patterns of acculturation that emerge. Two factors affect whether an anticipatory adjustment will be useful in the adaptation process. First, the information utilized to make the anticipatory adjustment must be credible and correct. Otherwise, the individual will form opinions and behavioral patterns that do not actually correspond with that of the new host culture. The second factor is the format in which the information is presented. Information must be presented in a format that will encourage the individual to pay attention and retain the information. If format is not a consideration, then accurate information that could aid the individual in making positive anticipatory adjustments could be ignored or overlooked.

The single most important thing a sponsoring organization can do prior to commencement of an international assignment is to ensure that pre-departure training has been provided to not only the expatriate employee but also to the accompanying spouse. It is necessary for expatriate families to be prepared in all aspects before leaving for a foreign country in order for them to adapt to life in the host country as early, quickly, and smoothly as possible.

One of the things that an organization could provide includes transmittal of information about the customs, culture, and norms of the host country (Yu et al., 2005). While this seems simple, many companies focus only on the tangible aspects of the new country such as finding housing or school enrollment and leave intangibles such as cultural knowledge unaddressed. The more they know, the better the trailing spouse will be able to anticipate the differences between the home and host culture and therefore begin the process of mental adjustment to a country with a different set of cultural morays, historical significances, and religious attitudes. Even basic awareness of the differences they may encounter will aid in preparation for psychological adjustments and contingency measures.

For assignments in countries that do not share a common tongue, companies can provide basic language training to expatriate spouses. Preparing for a move by learning even a little of the host country language can aid the adaptation process as it will facilitate easier communications with locals upon arrival in the new location. Shaffer and Harrison (2001) found that the more of the host country language a spouse learns, the less shocking the entire adaptation process will be.

Career planning is another service that companies could offer to training spouses. As previously mentioned, a significant challenge in the adaptation of expatriate spouses in a foreign country is the lack of something worthwhile to do with their skills and professional training, particularly if they have had to walk away from an existing career path in their home country. Feeling frustration at giving up what they had accomplished or achieved by working in their home country is potentially alleviated by planning what they can do in the host country and actively engage in those activities. By focusing on how they can either continue their existing career in the host country (or even find a new line of work), spouses can lessen the shock of a professional identity shift.

CONCLUSION

A firm understanding of the adaptation process by expatriate employees, their partners, and their companies is of prime importance as this understanding could assist companies in developing support programs with an aim to reduce expatriate failure rates as well as assist families by reducing the stress of relocation. The continued need for globally mobile executives means that, in order to increase the expatriate's chances of success, companies should be aware of the psychosocial needs of the spouse willing to follow their partner's career. Companies can provide formal support programs as well as encourage informal support systems in hopes of aiding the accompanying spouse with transition, thereby improving the chances of the expatriate employee's success.

From an individual perspective, the expatriate employee will have a smoother work transition and greater chances of success if their accompanying spouse has an easier acculturation period. From the accompanying spouse's point of view, increased awareness of the special needs and issues in making an international relocation will make their transition a smoother one so that they can support their family in their new global functions.

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