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**CROSS-CULTURAL ADJUSTMENT OF SELF-INITIATED DUAL-CAREER  
EXPATRIATE SPOUSES**

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**ABSTRACT**

**Purpose** - The purpose of the study is to identify cross-cultural adjustment issues of self-initiated dual-career expatriate spouses and the factors influencing this process.

**Design/methodology/approach** - For this in-depth explanatory study semi-structured interviews were carried out among 10 self-initiated dual-career expatriate spouses.

**Findings** - The study provides the insight of how dual-career SIE couples perceive their adjustment and suggests comprehensive explanation of the main adjustment issues.

**Practical implications** – A comprehensive understanding of dual-career SIE spouses' adjustment issues is invaluable in helping organizations to attract and retain these particular expatriates. The findings of the study allow organizations to develop different levels of cross-cultural adjustment support mechanisms for the SIEs and their spouses.

**Originality/value** - The study offers a potential contribution to the field of international business as well as represents a major gap in the existing cross-cultural adjustment literature. Present and future SIEs may use the results of the study as a framework to better comprehend to the challenges that their spouses encounter during the cross-cultural adjustment process in the host country environment.

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**KEYWORDS:** Self-Initiated Expatriate, Expatriate Spouse, Cross-Cultural Adjustment, Dual-Career Couple



## **1. INTRODUCTION**

### **1.1. Study Background**

The increase of worldwide business activities has directed to a growing number of expatriates going on overseas assignments. As it becomes essential for companies to expand internationally in order to maintain a competitive advantage in their industry, the demand for expatriate employees is rising. However, even though employees are willing to accept international assignments, the 'failure rates' are substantial (Anderson 2005). Many expatriates do not complete their assignments and return home prematurely (e.g. Mendenhall, Kuhlmann, Stahl & Osland 2002; Stahl, Miller & Tung 2002).

Not everyone can handle relocation, change an uncertainty easily, hence the success of expatriate assignment is directly related to the adjustment towards the new work setting (Kraimer, Wayne & Jaworski 2001). A great number of researchers have focused on the adjustment of expatriate employee in the foreign environment (e.g. Selmer 2006; Van Vianen, De Pater, Kristof-Brown, & Johnson 2004; Haslberger 2005; Harrison & Shaffer 2005; Mezias & Scandura 2005; Breiden, Mohr & Mirza 2006; Shaffer, Harrison, Gregerson, Black & Ferzand 2006).

Furthermore, a significant number of studies revealed that one of the most noteworthy matters for the success of expatriation is not only the expatriates adjustment itself but also the adjustment of the expatriate's spouse (e.g. Caligiuri, Hyland, Joshi & Bross 1998; Fukuda & Chu 1994; Shaffer & Harrison 2001). In fact, spousal adjustment issues are the major reason for expatriate assignment failure. Fukuda and Chu (1994: 43), for instance, who investigated Japanese expatriates and their spouses in East Asia, concluded that family-related issues are the most significant reasons of Japanese expatriates' failure on overseas assignments.

However, the adjustment of expatriate's spouse is still under-investigated research area, particularly among the self-initiated expatriate spouses. Self-initiated expatriates are individuals employed overseas having their own regular job without being assigned to the host country by any organization. Although there has been a growing recent interest

in self-initiated expatriation by a number of authors (e.g. Selmer & Luring 2010; Tharenou 2010; Tharenou & Caulfield 2010; Hu & Xia 2010; Chen 2012; Crowley-Henry 2012; Ariss, Koall, Özbilgin, & Suutari 2012; Altman & Baruch 2012; Cao, Hirschi & Deller 2013), this emerging area remains under-researched (Doherty 2010), there is very little knowledge about the experiences of self-initiated expatriation, particularly from and between developing countries (Al Ariss & Özbilgin 2010), and most importantly, none of the studies has investigated cross-cultural adjustment of dual-career self-initiated expatriate spouses so far.

## **1.2. Research Problem and Research Gap**

The role of expatriate spouse's adjustment and its importance for the success of international assignments was underlined already a couple of decades ago (e.g. Black 1988; Black & Stephens 1989). However, despite some principal attempts to study expatriate spouses' adjustment (e.g. Black & Gregersen 1991; Shaffer & Harrison 2001), Copeland and Norell (2002) emphasized that spousal adjustment on international assignments has still received inadequate academic and business attention.

Another author, McNulty (2005), also noted that there has been paid very little attention to the isolated and painful experience suffering expatriate spouse who is struggling in the cross-cultural adjustment process. Author pointed out that spouses are frequently being frustrated and abandoned as they try to take care of household, find out where to buy food and everyday necessities, find doctors, churches, plumbers, electricians, and often without understanding of language and culture. Therefore, the adjustment of the expatriate spouse needs to be examined (Glanz & Van der Sluis 2001) as well as the assistance of organizations for the expatriate spouses further investigated (McNulty 2012).

According to Cole (2011) the reason why relatively little empirical work could be found on the topic of expatriate spouse adjustment might be due to the fact that international human resource managers are underestimating the importance of the spouse and, as a result, assisting programs are often uncommon or ineffective. Author pointed out that "Research efforts to understand the experiences of spouses have also been limited"

(Cole 2011: 1508). Besides, the vast majority of the expatriate spouses' adjustment studies were carried out in American multinational companies, but very few studies were done in European countries and no studies were found among developing countries such as Eastern Europe.

In addition, according to Myers and Pringle (2005), whereas organization-assigned expatriates (AEs) are reasonably well understood nowadays, (e.g. Thomas 2002; Andreason 2008; Kupka, Everett & Cathro 2008; Luring & Selmer, 2010), far less attention has been paid to self-initiated expatriates (SIEs) who have been disregarded for a long period of time. Although Peltokorpi and Froese (2009) indicated differences among self-initiated and organization-initiated expatriate cross-cultural adjustment, Biemann and Adresen (2010) pointed out that there is still a research gap on the differences among organization-assigned expatriates and self-initiated expatriates both in general level and particularly concerning the differences in their individual career orientation and motivation.

Furthermore, despite the fact that through the last decade a growing volume of studies have been conducted in the area of non-traditional expatriates (Crowley-Henry 2012: 3), it has been recently indicated that the career of migrant workers is still an under-theorized field of study and particularly the careers of skilled migrants deserved a specific attention (Ariss, Koall, Özbilgin & Suutari 2012). According to Peltokorpi and Fabian (2013: 101), "while SIEs are identified to constitute a significant part of international labor force, surprisingly little research in this area has been conducted". Therefore, the findings of this research would allow enhancing the understanding of how SIE spouses' adjustment issues are differing from traditional expatriate spouses' issues and would be beneficial for better managerial solutions during international assignments.

Andreason (2008) indicated that cross-cultural adjustment of the expatriate spouse is a significant issue for international organizations, often being considered as the major reason for premature repatriation. The spouse has other challenges unlike the expatriate including the lack of a social support (Kupka & Cathro 2007), crucial responsibility for adjustment of children (Braseby 2010), and most importantly dealing with the new

cultural and linguistic barriers (Andreason, 2008). However, studies investigating specific categories of expatriates, including SIEs (e.g. Haines, Saba & Choquette 2008; Crowley-Henry 2012; Cerdin & Pargneux 2010; Tharenou 2010; Sullivan 2010; Hu & Xia 2010; Cao, Hirschi, & Deller 2013) have not included the element of SIE spouse cross-cultural adjustment. Hence, it is essential to study the factors that lead either to the success or failure of SIEs spouse cross-cultural adjustment.

Solving the above formulated problems, this research would allow increasing critical understanding of what are the main issues that self-initiated dual-career expatriate spouse is facing, what factors are influencing their cross-cultural adjustment, and how self-initiated expatriation adjustment practices could be improved in the future. Research would also fill the gap that has been identified in the existing literature by facilitating cross-cultural adjustment process of self-initiated expatriate spouses.

### **1.3. Research Design**

A qualitative research design is based on semi-structured interviews. Self-initiated dual-career expatriate spouse in the research is defined as individual having spent a minimum of six months on international assignment and having a partner with own career. Participants were asked during the interview whether they were looking for employment overseas on their own (SIEs) or whether they were directed by current employing company (AEs) and the following group was excluded from the further data collection process. The interviews were conducted in Lithuania, which as a country for data collection was chosen for its exceptionally high rate of self-initiated expatriates. In fact, in the space of two decades, Lithuania, a country with a population of 3.5 million, has lost half a million people which is only according to official figures, however the real expatriation rate might be higher (Presseurop 2012). According to Eurostat (2013), Lithuanians are the most migratory people in Europe (Appendix 1). The data had been collected over the period starting from 2013 the beginning of June till the 2013 middle of August. The results of the analysis are expected to help to define certain guidelines and recommendations for the SEs expatriate spouses' adjustment. The outcomes of the research may also help international managers in providing assistance and support for cross-cultural adjustment of SIE dual-career spouses.

#### **1.4. Research Questions and Research Objectives**

The purpose of the study is to explore the current experiences of self-initiated dual-career expatriate spouses' cross-cultural adjustment, and to identify what are the major adjustment challenges as well as adjustment influencing factors. This study will allow defining certain sequences and patterns which will lead to the suggestions for a better self-initiated expatriate spouses' adjustment in the future. Most importantly, since nowadays mobile workforce is changing and there is a growing number of self-initiated expatriates, distinguishing the adjustment process among SIE's and AE's spouses is essential. The research questions are addressed as follows:

- 1. What are the main cross-cultural adjustment issues of self-initiated dual-career expatriate spouses?*
- 2. Which factors facilitate or inhibit self-initiated dual-career expatriate spouses' cross-cultural adjustment?*

The research questions will be answered firstly by reviewing the existing literature and research on self-initiated expatriation, dual-career couples, cross-cultural adjustment and other related theories. Secondly, the analysis and conclusions will be provided based on the empirical data, which will be collected by interviewing self-initiated dual-career expatriate spouses.

#### **1.5. Assumptions and Limitations**

This study is exploratory by nature as there have been mostly only theoretical and philosophical foundations for this type of research questions. Therefore, qualitative analysis was chosen in order to explore the issues of the self-initiated expatriate spouses' cross-cultural adjustment.

Firstly, this study takes into account only self-initiated dual-career expatriates spouses from Lithuania. Therefore, study is affected by cultural and societal limitations and the results of the research may not be absolutely valid in other cultures. However, the thesis is exploratory and do not aim to gain statistical generalizations. Therefore, larger scale



studies with larger cluster and further cultural representation could provide more generalizable evidence regarding the adjustment process of different groups of expatriates in different geographical locations.

Secondly, the object of the research is self-initiated dual-career expatriate spouses. In the research are not included organization-assigned expatriates, global nomads, transfers, commuters, frequent business travellers or any other type of migrants.

Thirdly, both male and female expatriate spouses are included in the study. Thus, the limitation of this particular study is that it is not known whether there are significant differences in the cross-cultural adjustment of male and female self-initiated expatriate spouses. Despite the fact that the majority of the expatriate spouses' population are still female with some studies finding about 7 per cent of males (Ali, Van der Zee & Sanders 2003), some research (e.g. Braseby 2010) revealed that there are significant differences between the expatriate male spouse and the expatriate female spouse adjustment.

## **1.6. Key Concepts**

This section will briefly present the key concepts to be used throughout this study for the purpose of clarity.

### *Self-Initiated Expatriate*

Self-initiated Expatriate (SIE) is defined as an individual who is hired on contractual basis and is not being shifted overseas by parent organizations (Tharenou & Caulfield 2010). In other words, SIE is employed overseas and has own regular job without being assigned to the host country by any organization. SIE is expatriates and neither short-term traveler (sojourner) nor immigrant.

### *Expatriate Spouse*

An expatriate spouse, according to Wilson (2011), refers to any individual in a marital-equivalent relationship who has accompanied an expatriate employee on their overseas

assignment. Although the spouse is often married to the expatriate, it is not exclusively the case in literature, therefore both terms 'spouse' and 'partner' will be assumed as synonyms regardless their marital status.

### *Dual-Career Couple*

Dual-career couple (DCC) is defined as mixed-sex spouses who are married (or cohabiting) and who are both employed. DCC may be working in the same organization or different organizations but they both are often struggling with a numerous role conflicts arising from the work and home spheres. (Ugwu 2009)

### *Cross-Cultural Adjustment*

Cross-cultural adjustment is defined as the "degree of comfort, familiarity and ease that an individual feels toward a new cultural environment" (Takeuchi, Seokhwa & Russell 2002). Cross-cultural adjustment or simply adjustment will be used interchangeably.

## **1.7. The Structure of the Study**

This research is structured into several chapters. Chapter one introduces the reader to the subject and gives an overview of the background of the study, the research questions and research objectives, and the key terminology used throughout the thesis. The next three chapters present the theoretical part of the study. Chapter five follows with a discussion of the most prominent research methods including research approach, overall strategy, background of the data collection and data analysis. At the end of the chapter the quality measures such as validity and reliability are discussed. Chapter six discusses the empirical findings. Chapter seven follows the discussion of empirical findings in connection to theoretical background. Chapter eight presents the conclusions of the study, where theoretical contribution, summary of the results and managerial implications are provided. Limitations of the study as well as suggestions for the future research complete the last chapter.

## **2. SELF-INITIATED EXPATRIATION**

### **2.1. Talent Shortage and SIE**

Survey by Manpower (2013) carried out on 38.000 employers all over the world revealed that around 35% of them are having troubles filling jobs because of lack of talent available in the marketplace. The proportion has raise in comparison to the 2012 survey and this is the highest proportion of employers expressing their concern about talent shortages since 2007. (Manpower 2013)

Not only due to the talent shortage but also the fact that nowadays employment relationships become less organizationally-directed and more individually-directed (Sullivan & Baruch 2009) the world has become a big employment pool for self-initiated expatriates responding for global talent shortage. SIEs became important players in the global labour market and appreciated human resources for both the countries to which they expatriate and the organizations that they are employed.

According to Jokinen, Brewster and Suutari (2008), today's dynamic situation encourages organizations to target for agility and flexibility, and thus highly skilled SIEs become an increasingly important employment choice for international employers. Responding to the asymmetrically distributed environment and the scarcity of skilled professionals, SIEs start up their own expatriation taking advantage of the rewarding career opportunities (Chen 2012). Moreover, SIEs provide a lower-cost alternative than AEs, since they can be employed under local contracts and are often not being provided pre-departure and on-site training (Peltokorpi & Froese 2013: 94).

### **2.2. Characteristics of SIE**

Tharenou and Caulfield (2010: 1009) defines self-initiated expatriates as employees who are not assigned to another country by an organization but have instead chosen to move to a new country for seeking a job opportunities or starting an entrepreneurial venture, and living on their own arrangement. However, solely this definition does not explain the SIEs' behaviour explicitly, therefore the main characteristics of SIEs will be

analysed in this section.

Firstly, SIEs typically have a resilient faithfulness towards their professional development. Their first priority is personal, since they are more trustworthy to their own advancement of career rather than organization's goals. Hence, SIEs take control of their own career and use skills as a commodity to sell in a way that allows them to achieve their personal goals. This could be illustrated by Banai & Harry (2004) quotation of a British banker operating in the Middle East: "I manage my own career. I keep in contact with the market and have a good network with former colleagues and recruiters. My career is like a product that has to be kept in the market. I keep my eyes open for opportunities".

Secondly, unlike the traditional expatriate, the SIE has no expectation that the employer will support a dual-career family or provide long-term educational facilities (Banai & Harry 2004). Self-initiated expatriates instigate and usually finance their own expatriation and are not transferred by organizations. Instead they relocate to a country of their choice to pursue cultural, personal, and career development opportunities (Jokinen et al. 2008), often with no definite time frame in mind (Tharenou 2010).

Furthermore, more recently, Cao et al. (2013: 57-58) found that the most relevant characteristics defining SIEs are as follows: "Have freedom of choice (whether to expatriate, destination choice, length of stay outside their home country, whether and, depending on the immigration regulations, when to return). Are not sent abroad by their employer. Are currently working in or have had significant work experiences in the host country."

The term "protean career" could reflect fundamental, career-related attitudes of SIEs that are driving their entire career development process and expatriation experiences in general (Cao, Hirschi & Deller 2012). The concept of the "protean career" was introduced by Hall (1996). Protean career could be defined as self-directed, flexible, values-driven path involving a "whole-life" perspective "that will be reinvented by the person from time to time, as the person and the environment change" (Hall 1996: 8).

### **2.3. Motivation of SIE**

This section will seek to explain what motivates SIEs to expatriate, since expatriation can be based on a wide variety of motives and bounded by family relationships and commitments. Despite the fact SIEs are increasingly important group of migrants, according to Cerdin (2013: 59), what really drives SIEs to go abroad remain largely unknown.

Thorn (2009) identified six motives affecting SIEs decisions: cultural and travel opportunities, career motives, relationship motives, economic motives, quality of life, and political environment. According to author, at the personal level the most important motives include cultural exposure, travel, relationship and family, also attractiveness to particular host location and its lifestyle, and perceived ability to adapt (Thorn 2009). However, motivation varies in terms of personal characteristics. For example, Selmer and Luring (2010) suggest that younger self-initiated expatriates are more motivated by adventure, career, and financial incentives, and they are less risk averse than older age SIEs. From gender perspective, male SIEs are more driven in terms of financial opportunities than female SIEs.

Doherty, Dickmann and Mills (2011) found that motives relating to the desire of adventures, challenges, and travelling are the main factors influencing the decision to transfer overseas. Furthermore, authors found that host country reputation and location attractiveness were more significant motivation factors for SIEs compared to company-initiated expatriates who are focusing more on career development motives (Doherty, Dickmann & Mills 2011). However, this trend is understandable. SIEs have more choice to select the location on their own and often take a proactive role in controlling own life and developing cross-company expertise compared to AEs who are often suggested with the location by the host company.

Chen (2012) in his dissertation explored how self-initiated expatriates are motivated in various stages of career transition. Author has distinguished three main stages: exploration, establishment and embeddedness. At the exploration stage, SIEs collect information, evaluate their competence, explore the opportunity, and make their

decisions to go abroad. At the establishment stage, SIEs come across the new environments of the host country. At the later stage of establishment SIEs begin to adapt, feel more positive, they are motivated to establish both work and non-work relationships. At the embeddedness stage, SIEs face a choice whether they should settle down permanently or repatriate. (Chen 2012: 30)

Cerdin (2013: 62) has examined motivation factors to go abroad of 138 SIEs and found that three most important motivation factors are, in order of importance “(1) personal challenge, (2) professional development, and (3) importance of the job itself”. Author compared the results with 165 AEs; conclusions were made that all these three motivation factors are the identical for AEs and they do not differ significantly in the order of importance. The comparative study also revealed that “encouragement from spouse or partner” is less important motivation factor to go abroad for SIEs than for AEs, however, the difference was insignificant. (Cerdin 2013: 59-74)

#### **2.4. SIE versus Migrant**

While majority of authors agree on the key differences between SIEs and AEs, the distinction between SIEs and migrants vague and seems to be complex. There are only a few studies which have attempted to make a clear distinction among these two terms. Baruch, Dickmann, Altman and Bournois (2010) have made a distinction among migrants and SIEs in a sense that expatriate become a migrant when gains his rights to permanent residency status or citizenship. However, this distinction is obviously too narrow and contradicts with other literature. For example, United Nations (1998: 17) defines migrant as “any person who changes his or her country of usual residence”.

Another attempt to distinguish SIEs and migrants were made by Al Ariss (2010) who suggest making a distinction on four criteria: geographical origin, period of staying overseas, forced versus chosen nature of movement, and positive versus negative connotations of the terms. However, these criteria are questionable, because of several reasons. The assumption that migrants contrarily than SIEs move from less developed to more developed countries might be misleading. For example, if we assume that all the SIEs that are moving from Lithuania, a developing country, to any other developed

country in the world, according to these criteria they should be defined as migrants but not SIEs. Furthermore, author assumes that migrants are usually forced to leave home country because of unemployment while SIEs are not forced; they rather make a choice themselves. This assumption is also reasonably controversial, because both the migrants and SIEs might have different economic and political motives to leave the country.

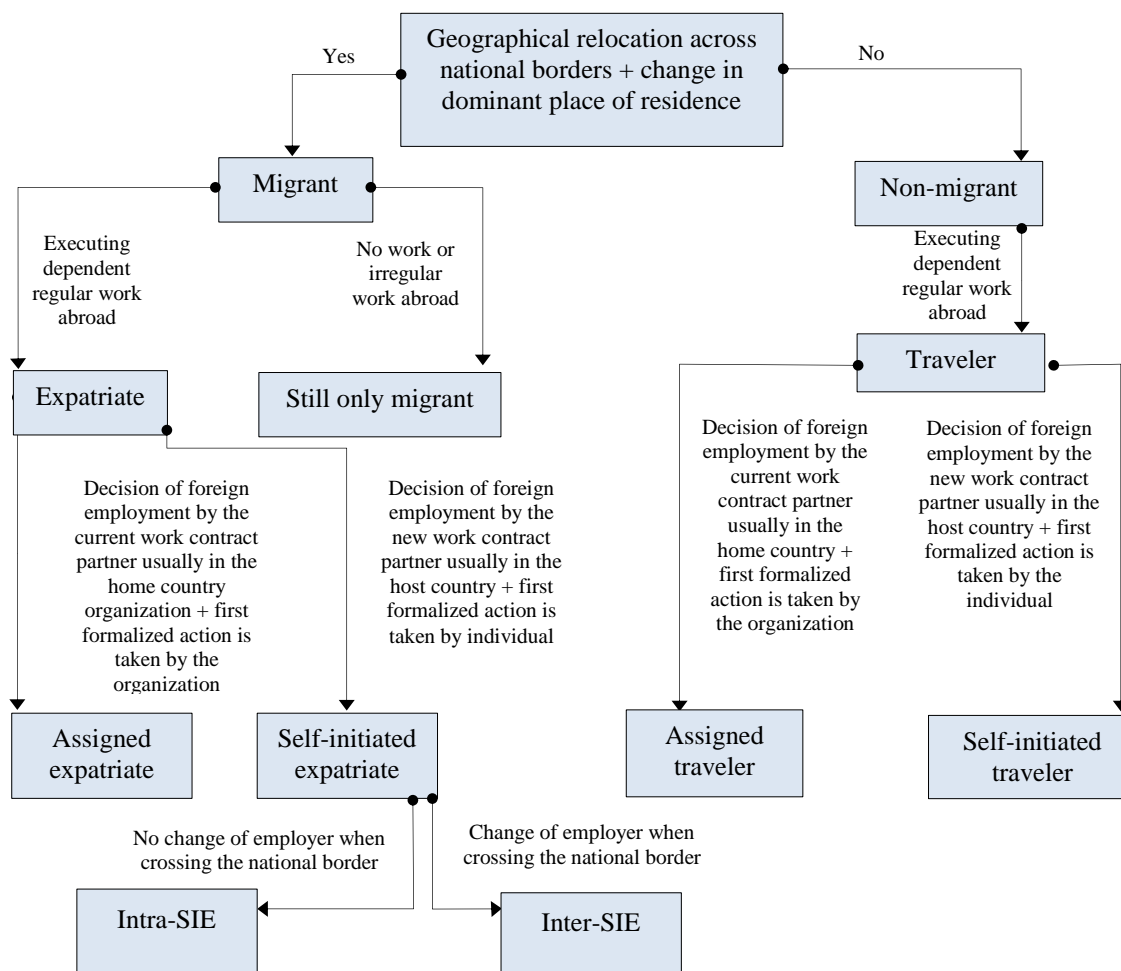
At the same time it was suggested by Tharenou and Caulfield (2010) that expatriates who are planning a temporary, undefined length of stay outside their home country, regardless its economic development level, while seeking career advancement should be distinguished from skilled migrants who aim to settle down permanently in the host country and become immigrants. After all, Al Ariss, Koall, Özbilgin & Suutari (2012) pointed out that the distinction among migrants and SIEs is still not clear enough in the literature.

Recently, Al Ariss (2013) has made more clarification on the mentioned criteria. For instance, the criteria to make a distinction among SIEs and migrants based on the geographic origin or ethnicity author calls as a stereotype. Moreover, author has collected and summarized the main stereotypes in the international management literature about SIEs and migrants. These stereotypes according to Al Ariss (2013: 238) include “country of origin, individual agency, the ability to integrate in a host country, available and recognized skills and qualifications, and choice/necessity to international mobility”. The main stereotypes are summarized in Table 1.

Perhaps the most up-to-date and noteworthy analysis has been completed by Andresen, Bergdolt and Margenfeld (2013) who have analysed 244 definitions from sociological, psychological and business journals in order to find relevant distinction criteria between AEs, SIEs and migrants. After a thorough analysis authors suggested four main demarcation criteria, which are illustrated in the ‘decision tree’, Figure 1.

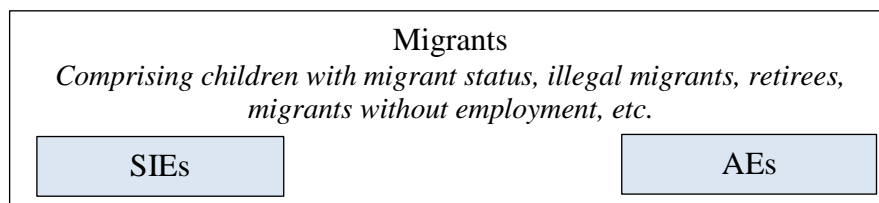
**Table 1.** Stereotypes Constructed in Describing Migrant and SIE (Al Ariss 2013: 237)

Migrant	SIE
Coming from developing countries	Coming from developed countries
Without agency and unable to act and advance their careers	Capable of strategically advancing their careers
Lack of integration and assimilation in the host country	Successful in becoming accustomed to and integrating in the host country
Lack of skills and qualification that are transportable across countries	Processing skills and qualifications that are transportable across countries
International mobility conceived as a necessity rather than a choice	International mobility conceived as a choice rather that a necessity

**Figure 1.** Decision tree (based on Andresen et al. 2013: 30)



The ‘decision tree’ clearly shows that SIEs are not a homogeneous group but a part of migrants. This is a crucial implication for the expatriation research, as various current models and definitions have been contradicting between each other. Now, according to Andresen et al. (2013: 32), it “becomes obvious that migrant is an umbrella term, including all kinds of AEs and SIEs” (Figure 2). In other words, all the expatriate subgroups in the ‘decision tree’ that are on the left side, belong to the umbrella category migrant. Whereas on the right side of the ‘decision tree’ all the international workers are called ‘travellers’; for example, ‘International Business Travellers’ (IBT) should be excluded from the category of migrants, because IBTs often travel internationally without changing their place of residence as their spouses remain at home country. (Andresen et al. 2013: 30-33)



**Figure 2.** Illustration of the interrelation between the terms. (Adapted from Andresen et al. 2013: 32)

To sum up, in this study the distinction of terms SIE and migrants will be used as it was suggested by Andresen et al. (2013: 32):

“An expatriate is an individual who moves to another country while changing the dominant place of residence and executes dependent work abroad. As such, the expatriate has migrant status. In case of SIEs, the first formalized action to move internationally is solely made by the individual who initiates expatriation, whereas the legal decision of employment is made by the new work contract partner, which is either a different subsidiary of the organization where they are currently employed (Intra-SIEs) or a new organization (Inter-SIEs).”

## 2.5. SIE versus AE

Comparisons among SIEs and AEs were made by several authors (e.g. Jokinen et al., 2008; Doherty, Dickmann, & Mills 2011), and more lately by Cao, Hirschi and Deller (2012) who have distinguished SIEs from company-assigned expatriates and skilled migrants. SIEs and AEs have a fundamental similarity: they both work for a significant period of time overseas. However, studies revealed that they differ significantly (e.g. Inkson, Arthur, Pringle & Barry 1997; Suutari & Brewster 2000) in terms of background variables, employer and task variables, motives, compensation, and repatriation issues.

One of the most common distinctions found in the literature among the SIEs and AEs is that the initiative to leave home country comes from the individual rather than employer since SIEs leave voluntarily and self-reliantly of any employer. For example, Hu and Xia (2010: 173) found that:

“AEs expect company-supported career guidance, whereas SIEs assume sole responsibility for the planning and management of their career, taking more control, which means they have a greater responsibility to actively define success and make efforts to achieve it. The SIE are expatriates who already got a global mindset and more culturally aware and adaptable.”

Furthermore, it is important to stress out that SIEs differ from assigned expatriates not only in the visible, or called the “outside” part, such as technical skills, career stages, financial support, time and career boundary; but also from their inherent, the “inner” side, such as motivation, information focus and value concern (Hu & Xia 2010). For instance, SIEs tend to see their international experience as an opportunity to develop ourselves individually rather than accomplishing particular company goals (Miettinen 2008).

The main differences among SIEs and AEs are summarized in the Table 2. Self-initiated expatriates differ from organization-assigned expatriates in terms of their background, motivation, initiation of expatriation, career development stages, decision of

employment being made, mobility across the organizations, funding, term of expatriation and repatriation.

**Table 2.** Assigned expatriates versus self-initiated expatriates (adapted from Andresen & Gustschin 2013:185).

	<b>AE</b>	<b>SIE</b>
<i>Background</i>	Traditionally male, well educated, older age	Diverse in terms of gender, education, and age
<i>Motives</i>	Dominance of organization-related goals and motives	Dominance of individual goals and motives
<i>Initiation</i>	First formalized action is taken by the current organization	First formalized action is taken by the individual
<i>Career stages</i>	Traditionally among higher positions	Any stage of career development
<i>Decision of employment</i>	Decision is made by home country organization	Decision is made by host organization
<i>Mobility</i>	Mobile within organization	Mobile across organizations
<i>Funding</i>	Company salary, overseas allowances	Personal savings, host company salary
<i>Duration of expatriation</i>	Usually fixed term	Usually unfixed term
<i>Repatriation</i>	Promise of similar level job	Usually no pre-arrangement

### **3. CROSS-CULTURAL ADJUSTMENT**

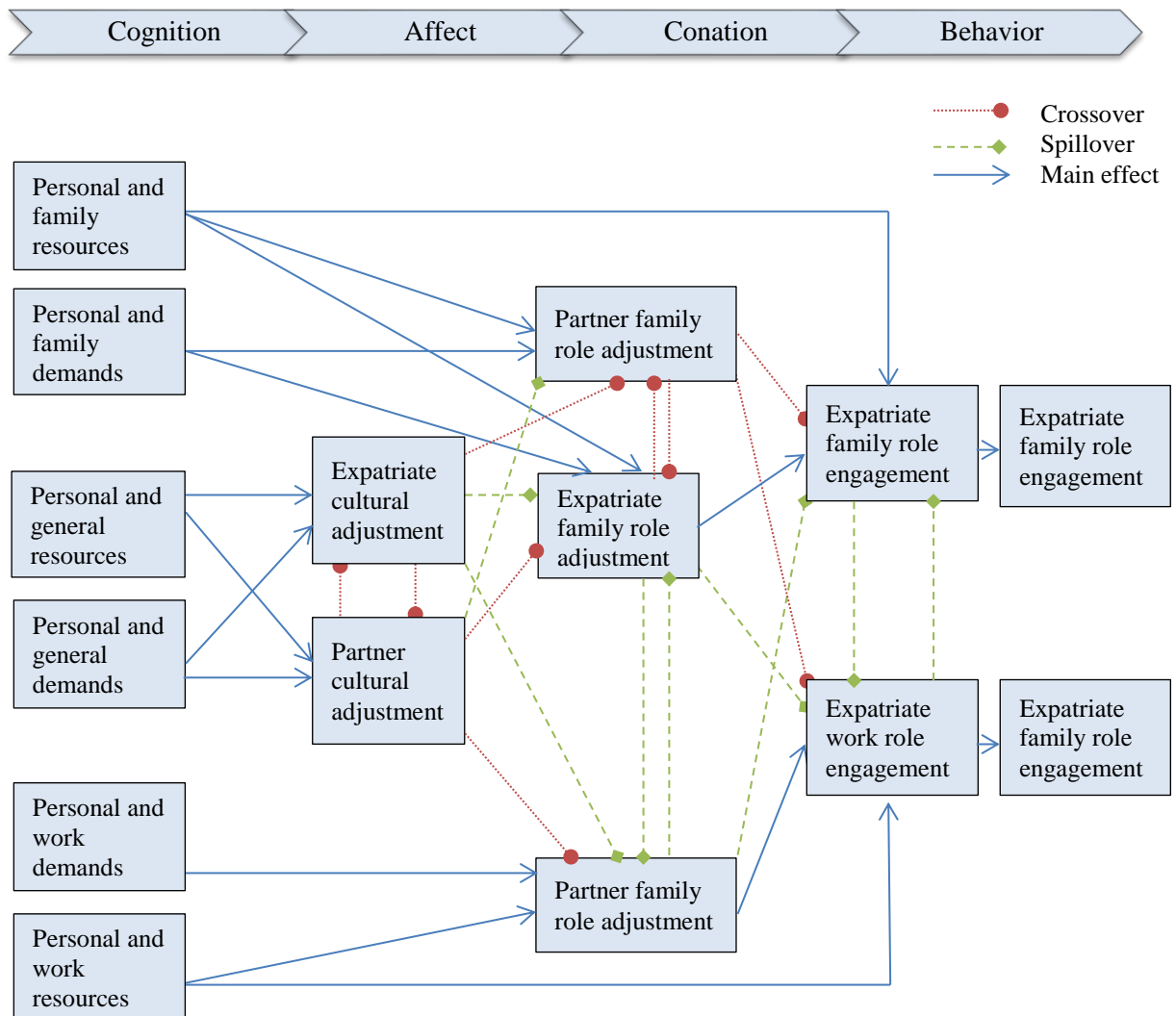
#### **3.1. The Concept of Cross-Cultural Adjustment**

Cross-cultural adjustment is one of the most prominent and well-established concepts in expatriation literature (Bhaskar-Shrinivas, Harrison, Shaffer & Luk 2005), and considered as a dominant cause leading either to expatriate failure or success (Hedo 2007). Theoretical foundations of cross-cultural adjustment are based on the cultural learning. The term 'cross-cultural adjustment' is defined as the degree to which expatriates are psychologically comfortable and familiar with different aspects of foreign environment (Black & Mendenhall 1991) or the degree of psychological well-being (Black & Gregersen 1991: 463). Another term 'adjustment', which is also commonly used in the literature interchangeably with 'cross-cultural adjustment', is defined as a low level of stress and a low level of negative attitudes associated with living in the host culture (Bhaskar-Shrinivas et al. 2005). In fact, terms 'cross-cultural adjustment', 'cross-cultural adaptation', 'culture shock', 'cultural distance' and 'acculturation' are often used interchangeably in the literature (Mendenhall, Kuhlmann, Stahl & Osland 2002). However, cross-cultural adjustment primarily focuses on the process of coping to new environment in the host country, which is temporary rather than a major realignment of identity that takes place with adaptation (Rosenbusch 2010: 25). Cross-cultural adjustment, or simply adjustment, can be conceptualized at least in two ways. First, as the degree of psychological adjustment experienced by person in a new location. Second one takes into account more objective terms, such as performance ratings. In this study the first concept is being used, assuming that adjustment is a psychological comfort of the individual towards the new environment.

#### **3.2. Cross-Cultural Adjustment Model**

One of the first significant works in the field of cross-cultural adjustment was completed by Black, Mendenhall & Oddou (1991) who proposed the 'Framework of International Adjustment', which suggests that a number of factors, including family members, are affecting expatriate adjustment. However, authors did not specify how and the family members affect this process. Moreover, the model was not tested

empirically. The model was further developed into ‘The Model of Intercultural Adjustment’ by Parker & Mc Evoy (1993). Authors distinguished individual, contextual and organizational factors influencing expatriates in general, work and social interactions in host country. Again, empirical research on the issue of spouse adaptation has not been done. More recently, a new model has been introduced by Lazarova, Westman & Shaffera (2010), which consider how the dynamic interaction of work and family effects performance of expatriates. Authors offer a theoretically grounded model (Figure 3) of the expatriate experience across four stages: cognitive, affective, conative, and behavioural.



**Figure 3.** A Model of the Work-Family Interface on IA. (Lazarova et al. 2010)

### **3.3. Failure of Spouse's Adjustment - Key Reason of Premature Return**

Poor cross-cultural adjustment by expatriates or their spouses and job dissatisfaction, are the factors most related to premature return or assignment failure. Bhaskar-Shrinivas and colleagues (2005: 273) found that poor cross-cultural adjustment is a key intervening factor leading to important consequences resulting in job dissatisfaction, poor performance, withdrawal decision and intention to prematurely resign from assignment, whereas well-adjusted employees and their spouses are generally more effective and successful in their career and personal life. Most importantly, the international transfer has often a greater impact towards the spouse rather the expatriate (Rosenbusch 2010: 30).

Black, Mendenhall and Oddou (1991) highlighted that spouse's adjustment often has a direct influence on the expatriate employee's adjustment. In fact, different host culture pressures tackled by the spouses can lead to a great culture shock and stress, which is frequently more intense than that faced by expatriate. Most importantly, authors emphasized the fact that even though the expatriate possess the necessary skills for a successful international assignment and cross-cultural adjustment, the assignment may fail, if his or her spouse does not possess the same important skills and is unable to adjust to new environment.

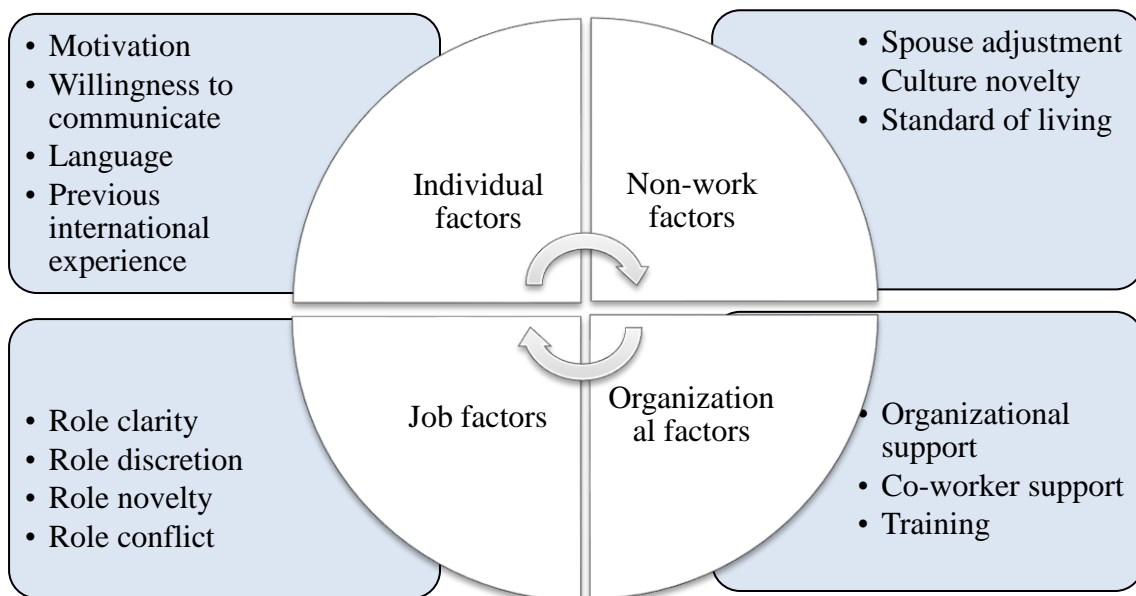
A recent survey on global relocation trends carried out by Brookfield Global Relocation Services (2012) revealed that 6% of all assignments failed in the year of 2012. When companies were asked to rank the factors that were most related to assignment failure, respondents cited as the top reason (19%) the resign of the employee to work for another company. The second most important factor of assignment failure was spouse dissatisfaction (17%), and the third - other family concerns at 11% (Appendix 2). Furthermore, as the top family challenges (Appendix 3) companies identified spouse or partner resistance to international relocation (48%), family adjustment (38%), also children's education (35%), and location difficulties (21%). (BGRS 2012)

The reasons for premature returns according to Evans, Puick and Barstoux (2002) often include the following: inability to handle stressful situations, incompetence to

communicate with people from host culture, lack of ability of the spouse to adjust to the new country, and specific issues of dual careers. Therefore, it is not only a question of the expatriate's but also spouse's ability to adapt in the foreign country. However, despite the fact that family reasons were found among the most significant challenges for global careers (Suutari, Tornikoski, & Mäkelä 2012), lots of companies still fail to recognize the relation of the employee performance and spouse adjustment, which leads to various negative consequences such as great financial loss for the company. Moreover, the real cost of assignment failure often goes beyond financial expenses. Thus, it is vital to gain a better understanding of the cross-cultural adjustment process of the spouse.

### 3.4. Facets of Cross-Cultural Adjustment

The purpose of this section is to provide a better understanding of how certain factors influence expatriate spouse's adjustment. Based on literature review normally there are four general categories distinguished into which various variables of adjustment can be placed. These are as follows: individual factors, job factors, organizational factors, and non-work factors (Figure 4).



**Figure 4.** Factors of cross-cultural adjustment (created according to Black & Gregersen (1991) and Bhaskar-Shrinivas, Harrison, Shaffer & Luk 2005)

Individual factors include specific personal requirements for effectiveness in the host environment. Job factors include the features of the work setting over which an expatriate has a limited control. Organizational factors are features of host company culture. Non-work factors include stressors of the foreign environment other than expatriate's work. Whereas expatriates are influenced by these four categories of factors, non-working spouses are only influenced by individual, organizational and non-work factors. However, the object of this research is self-initiated dual-career expatriate couples, thus all four factors will be discussed in this section. (Bhaskar-Shrinivas et al. 2005: 260-261)

Black and Gregersen (1991) suggested that adjustment is a multi-faceted conception involving of three aspects or facets: general adjustment, work adjustment, and interaction adjustment. General adjustment refers to the degree of psychological comfort associated with various non-work factors which include aspects of the host culture setting, general living conditions, climate, health-care services, transportation, entertainment, facilities, local food, housing, shopping, and so forth. Work adjustment refers to the degree of comfort associated with the assignment job or tasks, different expectations, performance, and work values. Interaction adjustment refers to the degree of comfort related to interaction with host country nationals both inside and outside of work. All three variables were found to be interdependent. (Peltokorpi & Froese 2013: 94, Bhaskar-Shrinivas et al. 2005: 257)

Black, Mendenhall and Oddou (1991) found and distinguished eight major factors that influence expatriate adjustment. These factors are: culture novelty, motivation, previous international experience, language, willingness to communicate, standard of living, training and organizational support. It was suggested that these factors could be placed into four general categories of adjustment: individual factors, job factors, organizational factors, and non-work factors (Black & Gregersen 1991). Likewise, Takeuchi and Hannon (1996) distinguished four individual variables: experience, knowledge, language proficiency, and willingness to communicate; one organizational variable: training; and one national variable: culture novelty. The study revealed that educational level, willingness to communicate, and language proficiency are directly connected to the spouse adjustment process.



Hedo (2007) found that expatriate cross-cultural adjustment is influenced by previous international experience, educational level, time spent in the host country, language proficiency, previous knowledge of the host culture, tolerance for ambiguity and stress, empathy, emotional intelligence, interpersonal skills, and demographic factors such as age and years married or being together with the spouse. However, there is a slight contradiction in the literature. For example, some individual factors, such as previous international experience, to the astonishment of many scholars as well as hiring managers, were found to have only a minimally facilitating relationship with adjustment, thus it should not be used as a predictor in selecting individuals for expatriate assignments (Bhaskar-Shrinivas et al. 2005: 273). Finally, when expatriate and his or her family decide to leave an international assignment, they are leaving the host country culture and its members as much as they are leaving the job itself, therefore cultural adjustment is perhaps the strongest factor of disengagement and withdrawal decisions. (Bhaskar-Shrinivas et al. 2005: 273)

### **3.5. Cross-Cultural Adjustment of SIE Spouse versus AE Spouse**

Self-initiated expatriate spouses likewise to organization-assigned expatriate spouses face cross-cultural adjustment challenges. However, Beck (2012: 6) is arguing that it is not known whether there are any similarities in terms of cross-cultural adjustment of the spouses of SIEs and the spouses of AEs. Nevertheless, it is obvious that the responsibility to deal with various challenges typically lies on SIEs themselves due to the fact that SIEs do not have support from home company, thus we may assume that it may influence their spouse accordingly.

As it was suggested by Hu and Xia (2010), in the case of SIEs, the individual's career progress must be monitored much more closely by the individual itself than in case of organization-assigned expatriate when long-term career planning is supported by the organization. Furthermore, SIEs, especially from developing countries, are facing more administrative barriers and career constraints compared to AEs; for example, difficulties to acquire visas and work permits in the host country (Al Ariss & Özbilgin, 2010).

In fact, the significant differences in SIEs and AEs cross-cultural adjustment have been

found by Peltokorpi and Froese (2009, 2013). SIEs are found to be more diverse in terms of age and more frequently female compared to AEs, they are also more mobile among organizations and change them more frequently, expect higher benefits from overseas experiences for their profession development, and their main motivation factor is gaining international experience (Biemann & Andersen 2010). Crowley-Henry (2012), who analyzed career development of self-initiated expatriates, calls them rather 'rivers' than 'ladders', meaning that SIEs are more career opportunity oriented individuals who are able to adjust and overcome the obstacles more easily than AEs. Moreover, findings by Peltokorpi and Froese (2013: 94) revealed that SIEs and AEs differ in terms of host country language skills, overseas experience, job situations, and interaction adjustment. On the other hand, there were no statistically significant differences in expatriate's demographics, general adjustment, and work adjustment found. Thus, we may only make assumptions that SIEs and AEs spouse's cross-cultural adjustment may be different based on the fact there are certain differences among SIEs and AEs adjustment itself. However, there is no reliable proof available, which makes this research even more vital and necessary.

### **3.6. Cross-Cultural Adjustment of DCCs**

Dual-career couple (DCC) is a partnership or marriage of two people when both individuals are committed and follow their own career. Dual-career couples have become the norm, rather than exception at least a couple of decades ago (e.g. Avery & Zabel 2001: 15) and the ongoing increase is projected (Gordon & Whelan-Berry 2004: 271). However, in the past, dual-career couples were not as common as nowadays. Spouses were usually female, and they were still prepared to follow their partners' domestic and international assignments. The increase in the number of dual-career couples and working spouses has now created problems regarding international assignments and their success or failure (Le Bell 2005). In dual-career couples there is often more than one work environment involved and both individuals should be considered equally important, since both spouses are playing an integral part in cross-cultural adjustment process. The expatriate may possess all the necessary skills for cross-cultural adjustment, but if the spouse does not possess the same important skills, it will lead to assignment failure (Black et al. 1991: 295)

Harvey & Buckley (1998) were some of the first authors who identified that the main difficulties related with dual-career couples consist of higher refusal rates to relocate internationally, extended length of adjustment cycle, interference of family income, intensified dysfunctional family concerns, discontinuity in spouse's career, and premature repatriation issues. Likewise, Caliguiri, Hyland and Joshi (1998: 609) investigated 110 families and found the positive correlation between family characteristics of support, adaptability and communication, and family perception of the international transfer: "Families who possess a positive perception of moving internationally adapted better to living in the host country when compared with those families with a negative perception of the move".

"Dual careers are an increasing obstacle to international assignments" - note Luring and Selmer (2010: 61). In a global context it is extremely difficult for dual-career couples manage their individual careers because of complexity of overseas assignments (Harvey, Novicevic & Breland 2009). They have to make very challenging decisions as the spouse's career opportunities often need to be sacrificed or suspended in order to accommodate an international assignment (Dupuis, M.-J., Haines, V.Y. & Saba, T. 2008: 279). Moreover, researchers Budworth, Enns & Rowbotham (2008: 104) has examined dual-career couples and revealed that career decisions among these couples are made at the level of the dyad, which makes decision making process even more complex and problematic:

"Decisions made by one individual almost certainly affect the career path of the other. As either member of the couple attempts to build individual careers, each person must consult the other on issues such as number of hours spent at work, relocations, promotions, and sharing of household tasks. When the couple decides to raise children, the complexity of career decisions is compounded as there is a greater need to coordinate work and family roles within the couple when childcare is involved."

One of the latest studies about how dual-career expatriate couples experience the different roles fulfilled by their spouses was carried out by scholars Mäkelä, Känvälä and Suutari (2011). Authors analysed four different spousal roles: "supporting", "flexible", "determining" and "instrumental", which were previously identified in the

literature (Välimäki, Lämsä, & Hiillos 2009), and also identified two new roles namely: “restricting and “equal partner”. The findings of this research is valuable for the current study in a way that understanding multiple spousal roles can lead to better solutions of self-initiated dual-career expatriate spouses’ adjustment. In order to better understand spousal roles and the significance of genders, the last sub-section will present and discuss social role theory.

### **3.7. Cross-Cultural Adjustment and Social Role Theory**

Social role theory in this context is important due to the fact that gender role in dual-career couples’ cross-cultural adjustment process perhaps is not neutral. Social-role theory (Eagly 1987) proposes that women and men fill certain gender and social roles. As Franke, Crown & Spake (1997) has pointed out women and men beliefs and behaviors are influenced by certain stereotypes devoted to these roles. Hence, since work-family issues are not gender neutral, it is essential to make a distinction that male and female spouses may find different adjustment issues. In fact, according to the work-family literature, men and women do not react the same way towards work-family issues. Hence, according to Fu and Shaffer (2001: 519) in order to reduce WIF - work interference with family - conflict organizations have to focus on reducing role conflict.

According to Tharenou (2008: 195), “decision to expatriate is made in different ways by men and women due to their different family responsibilities and roles.” Furthermore, some empirical studies suggest that women experience relatively more work-family conflict than men do (e.g. Aycan & Eskin 2005; McElwain, Korabik & Rosin 2005; Cinamon 2006). As a result, women may reduce their professional aspirations in favor of family in order to avoid the strain of work-family conflict. As a result, it may limit women’s ability to relocate internationally (Moore 2002), and it may also explain why women are not as willing as men to leave for international assignments (Lowe, Downes & Kroeck 1999). Fu and Shaffer (2001: 517), who found differential effects on genders, suggest that despite the equal employment opportunities, the stereotypes of women as a family caregiver and male as a breadwinner still prevail.

On the other hand, other authors suggest that this trend is about to change, since the

majority of women during the last decade were seeking employment themselves and hence, the number of dual-career couples is increasing. DCCs nowadays are the norm, rather than the exception and this statement can be supported by researches carried out by Selmer & Leung (2003) and more recently by Cole (2011). Indeed, the statistical data indicates that the number of female expatriates continues to rise slowly, but steadily (BGRS 2012). As it was suggested by Mäkelä, Suutari and Mayerhofer (2011), this trend may continue not only due to the increased percentage of highly educated women in the workforce, but also due to increasing companies' demands to fill the gap of available positions in the face of a decreasing number of eager candidates. Furthermore, Stroh, Varma & Valy-Durbin (2000) argues that apart from the existing myths, women are not less interested in international careers than men. Women expatriates are at least equally qualified as men (Cole & McNulty 2011).

Moreover, female expatriates have been found to be equally successful to male expatriates in the performance of their international assignments (Haslberger 2007). Review of 25 years of research on women and international assignments carried out by Altman & Shortland (2008: 210) concluded that "women adapt better than men in cross-cultural business situations". Similar results were also derived by Cole (2011: 1522), who found that female spouses had significantly higher cultural adjustment than male spouses. Author also concluded that career-oriented female spouses, whose employment was interrupted, had meaningfully higher cultural and interactional adjustment rates than career-oriented male spouses. According to Cole (2011:1522) these results are consistent with social role theory. Meanwhile, men will have to overcome cross-cultural adjustment challenges with more difficulties than woman in the near future. While female spouses will experience less change in their gender role, men spouses may encounter a major change in their traditional social role. According to Cole (2011: 1509), a man who becomes an accompanying spouse and encounter with difficulties such as securing his employment, he may be forced to take a non-traditional role of a 'househusband'. This social role change when man becomes economically reliant on the female expatriate spouse, may involve number of psychological challenges and negatively affect male spouse's adjustment. (Cole 2011: 1509). The next section will present what kind of support is needed by DDCs in order to facilitate their adjustment.

## **4. SUPPORT PRACTICES FOR SIE SPOUSES**

### **4.1. The Need of Support for SIE Spouse**

Though the support for expatriate spouse's cross-cultural adjustment has been found to be an ultimate success factor of international assignment (Cherry 2010), Beck (2012: 90) has pointed out that there is no or very little research particularly on the support for SIE spouse. While the support practices for organization-assigned expatriates and their families is a relatively well investigated area of the research, the support for SIEs and their spouses remains afar from the interest of many scholars. No earlier studies were found that addressed the questions of who is responsible for the support of the SIE spouse and what kind of support is necessary. Furthermore, there is no statistical data available, which could provide information specifically about the existing support practices for SIEs and their spouses. Nevertheless, this trend may be understandable due to the fact that SIEs are the specific group of expatriates who are initiating their expatriation independently from the host company, thus it seems that are less support options possible compared to AEs, at least in the pre-expatriation stage.

However, it is obvious that all partners regardless of the nature of expatriation need assistance in adjusting to life in a new country, from learning the language to dealing with the fact of being isolated from their friends and family. Therefore, this section is addressing a very important question of what can be actually done by employers, colleagues and other members of the host country in order to facilitate the adjustment of SIEs spouse. In fact, most of the employees nowadays have not only work but also family responsibilities, and most married employees, regardless of gender, have an employed spouse, but in many cases jobs are still designed as if the employees have no family responsibilities (Bailyn, Drago & Kochan 2001). Thus, based on the literature and statistical data available about expatriates in general, the focus of this section is addressed on how companies could re-design the current jobs in order to facilitate SIEs and their spouse's adjustment.

According to Haar and Roche (2010: 1009), the way of how employers support the work and family roles of their employees has effect on how employees consider their

lives outside work. Scholars have emphasized the fact that “supportive work-family environment will encourage employees to reciprocate with enhanced outcomes” (Haar and Roche 2010: 1011). Therefore, it is essential for the companies to find and utilize the ways of how to assist expatriate spouses in order to achieve their work-life balance, increase qualified staff recruitment and retention, as well as achieve greater commitment and performance. Failure to do so may result in a number of negative consequences induced by disappointment and frustration of SIEs spouses, and shifting the attention of the expatriate from the job matters to the family concerns.

Lastly, the employees who feel they are highly valued by their organization will likely perceive their organization as valuing them as individuals, and as a result interpret them more favourably. This can be explained by social exchange theory which is critical for better understanding of the relationship between work and family practices. Social exchange theorists Brandes, Dharwadkar and Wheatley (2004) suggest that employees assess social interactions through a company and reasonable exchanges can result in employee reciprocation in the future. According to Brandes et al. (2004), employees develop certain beliefs about how much they feel are cared and valued by their employer. In other words, employees feel obligated to compensate their company in response to the work-family practices they have received. Social exchange theory can help to understand why organizational support for expatriate spouses is so important.

#### **4.2. Organizational Support for SIE Spouse**

The survey on expatriates in general carried out by Brookfield Global Relocation Services (2012) indicated that the majority of the companies (78%) support spouses or partners with language training, 41% sponsor a work permit, 33% with education and training assistance, 33% provide a lump sum allowance for spousal support, 30% career-planning assistance and 28% employment search or job-finding fees (Appendix 4). In addition, 10% of responding companies assist international assignees with elderly family members. It was found that 64% of these companies relocate elderly family members to the assignment location and 55% of the companies support international assignee visits to the home country. The survey also revealed that among the companies where cross-cultural preparation was offered on all assignments, 60% provided training

for the entire family, 27% for international assignee and spouse, and 8% for employees alone. (BGRS 2012: 54)

On the one hand, previously mentioned survey shows that there are numerous ways of how employers can better support dual-career expatriate couples and increase the number of expatriates accepting and succeeding in overseas assignments. The support may include a great range of means, such as providing career path flexibility, supporting meaningful career, addressing issues of assimilation and loneliness for spouses in the host country, facilitating re-entry for spouses and partners, and so forth (Moore 2002). In general, a positive trend in spousal adjustment support can be noticed since companies are shifting their support from informal to a more formal approach. For example, employment assistance is offered, ranging both from an informal approach, when the company provides referrals to job contacts at other companies, to a more formal approach involving assistance from a career services or job search firm, which is familiar with the local job market and salary ranges. (Blackhurst and Cummins 2005)

On the other hand, despite the fact that there is some evidence that the provision of language training, children's educational assistance and cross-cultural training to spouses is slightly increasing (Cartus 2012), the process of family integration into new environment is usually left solely to the spouse, since many employers are still quite reluctant to offer the expatriate spouse assistance and they mostly focus on the expatriate him/her-self. The reasons for the unwillingness to help expatriates' spouses are miscellaneous, of course, but perhaps one of the main reasons is related to fact that companies are hesitant to invest additional funds for the spouse. Another reason why companies may be hesitant to offer support for the spouses is the uncertainty about how effective these programs are in general, since the effectiveness of support programs is still under researched area. (Cole 2011)

While the AEs and their spouses can be supported both by the home and host companies, naturally SIEs and their spouses may be supported only by host company. Nevertheless, there are numerous ways that employers can support SIE spouses. Moore (2002) has investigated the supporting practices of dual-career couples on global assignments and found that one of the key factors in accepting assignment is whether



the time is right. When the timing is right, spouses have career path flexibility and are more likely to relocate. Even those spouses who were unwilling to move may change their mind after children are born or after they become ready to make a career change, take opportunity for education, etc. (Moore 2002: 63-66) However, in the case of self-initiated expatriation this kind of support is not relevant compared to organization-assigned expatriation, since the SIEs can choose the timing on their own.

Furthermore, Moore (2002) emphasized the importance of meaningful career support for expatriate spouse. Author suggest that companies may help spouses to obtain relevant employment opportunities, assisting with resume building, job search and provision of job banks, helping to obtain a work permit, or alternatively may provide volunteering opportunities. Scholar also pointed out that companies may provide compensation or matching funds for the spouse's career or education expenses. Most importantly, companies need to understand the wide range of employee and their spouse needs while addressing issues of assimilation and loneliness, and assisting with cross-cultural and extended language training, and creation of welcoming atmosphere. Lastly, for many expatriate spouses a short notice about the termination of employment leads to a limited time to plan their repatriation to home country, which is often extremely challenging. Therefore, as regards SIEs and their spouses, an adequate amount of time could be given for their relocation, which helps to facilitate re-entry, enrol children in schools and so forth. (Moore 2002)

### **4.3. Networking and Social Support for SIE Spouse**

The support of social networks is an important part of settling-in for expatriates and especially for the job seeking career-minded spouses (Cole 2011: 1523), since it was found that most of dual-career expatriate spouses find their jobs on their own initiative facilitating personal networks and contacts (Moore 2002: 64-65). Wang and Kanungo (2004) who investigated social network's effect on expatriates in China found a significant network's influence on their psychological well-being, positive relationships with others, environmental mastery, autonomy, personal growth, and purpose in life. Furthermore, Copeland and Norell (2002) found that spouses who were assisted with

social support systems adjusted better compared to the spouses who didn't receive this kind of support.

Mäkelä and Suutari (2009) pointed out that career-related networks and intensive interaction with a large number of contacts from diverse cultural, social, and professional backgrounds are valuable sources of informative and emotional support. International network ties, for instance, can provide resources for obtaining intercultural skills and knowledge, and serve as emotional support, task assistance, sources of career information (Rosenbusch 2010), and also involve organizing socio-cultural activities, maintaining a list of volunteer activities, orienting new expatriate couples for the new environment, and performing many other support activities (Moore 2002: 66).

Thus, establishing a large, active and diverse social network including local contacts with the host country nationals and other expatriate families in the community is essential for the expatriate assignment success. However, research suggests that majority of spouses need at least some basic information to assist them with establishing a social network (Cole 2011: 1519). Hence, companies should consider building an infrastructure in which expatriates and their spouses could share their insights and stories across the world, help each other to reduce the stressors, and lower the environmental pressures (Rosenbusch 2010: 125-126). Furthermore, Cole (2011: 1521) found that "practical support from someone who understands how difficult this experience can be a life saver", since literally, there were some cases reported of spouse suicides. Author highlighted that spouses often consider another spouse who already settled into the new location as the best suitable source of support because they can put themselves in the shoes of the spouse's due to their own experiences.

The expatriate spouse faces a different type of adjustment than the employee (Andreason 2008). Whereas the employees are provided with a social network at their place of employment, the accompanying spouse must create their entire social network on their own if any support is provided, which may be extremely challenging and stressful (Kupka & Cathro 2007), especially when the accompanying spouse is male. Moore (2002: 65-66) found that male spouses are experiencing more challenging

adjustment process since they are left out of the informal ‘wives network’ serving as communication and social support mechanism:

“While spouses, both men and women, encounter many of the same issues during an overseas relocation, there are a few issues unique to men spouses/partners. While 70 per cent of women spouses/partners feel included in the socializing that takes place with other expatriates, only 39 per cent of men partners do. [...] To quell the more pronounced feelings of isolation for men spouses, networks can sponsor activities that include both men and women spouses. Also, partnering with other companies in the region can yield a wider pool of men spouses to network together.”

Since the SIEs, contrarily from AEs, normally are not supported by host company, networks, contacts and spousal clubs, may fill this need for support before self-initiated expatriation. In fact, SIEs spouses could be supported by networks from the host country even more efficiently than the AEs spouses are supported by home company. This is due to the fact that local HR department often do understand the real cross-cultural adjustment challenges in host country:

“[...] the administration of the assistance was often criticized, with a common complaint being that human resource departments in the home country did not understand the difficulties facing expatriate employees in other, often lesser developed, parts of the world, and local host country HR staff did not understand the cross-cultural challenges facing expatriate families.” (Cole 2011: 1521)

Finally, the advancement in technologies nowadays allows receiving various kind of support before the expatriation even though it may seem impossible in case of self-initiated expatriation. For instance, SIEs and their spouses may find cross-cultural consulting service providers via internet or phone, or local agents who know the local market and can advise prior, during and after expatriation. According to Clemetson (2010) hiring external companies may provide even better services to the expatriate spouse. Thus, information exchange forums or telephone coaching experts may be good

options to receive valuable support for SIE spouse. Lastly, most of the spouses do not care where the support is received from, as long as it is received (Cole 2011).

Concluding the literature review part, which revealed an existing gap in cross-cultural adjustment theory, it becomes evident that the present study of self-initiated dual-career expatriate spouses' adjustment is needed in order to gain an in-depth understanding of the main issues and factors influencing adjustment process. Now, when the previous relevant theory and research related to the cross-cultural adjustment of self-initiated dual-career expatriate spouses is presented, it is time to move on to the actual study of the thesis. The following section will provide explanation for methodological choices and how the whole study has been implemented.

## **5. METHODOLOGY**

The purpose of this section is to present methodological choices of the study, to discuss the research strategies and approaches along with the reasoning behind those choices. The section starts by presenting researcher's role and philosophy, further describing the research approach and design, data collection and analysis, and finally the discussion of validity and reliability completes the section.

### **5.1. Researcher's Role and Philosophy**

The access to the external world is impossible without our own observation and interpretation, hence it is essential to notice that the view of different individuals can diverge due to their different backgrounds, experiences and interests. For this reason it is important to describe the research process transparently explaining the basic philosophical assumptions of the researcher and making it clear to the reader. Moreover, due to the fact that the qualitative research approach is employed in this study, the researcher's insights, impressions, and subjective assessment of opinions often has a great concern, because this approach is based on constructionism where the reality is grounded on perceptions and experiences that vary depending on particular context and different individuals. (Eriksson & Kovalainen 2008)

International business and especially cross-cultural management is a great interest of the researcher's both academic and personal life. The author's concern in the topic of self-initiated expatriation and spousal adjustment issues has grown from the personal cross-cultural experience. Despite the relatively young age author has gained valuable international work experience among different countries all over the world, beginning with home country Lithuania, and continuing his career by self-initiated expatriation to United Kingdom, Canada, Norway and Finland along with a short term company-assignment in Sweden.

Not only the experience of personal adjustment challenges but also having a working spouse from Spain has inspired the researcher to investigate these issues in-depth and find the best practices of how to make cross-cultural adjustment easier to other dual-

career couples. Furthermore, author is planning to set up his own company in the near future, thus there is a great interest to understand the issue from both sides, i.e. not only from the perspective of expatriate couples, but also from the perspective of organizations. For these motives and reasons author is honestly interested in providing practical solutions of better SIEs' spouses' adjustment.

Due to the advantage of the researcher's current understanding about the complexity of self-initiated expatriation issues it is "not necessary to spend a good deal of valuable time in 'learning the context' in the same way as the outsider does" (Saunders, Lewis & Thornhill 2007: 144). However, this advantage carries with itself a significant disadvantage of unconsciously making assumptions, which can prevent from discovering the matters that would enhance the value of research. Familiarity about the issue may result in failure to ask 'basic' questions that the researcher may feel knowing beforehand, thus it is important to be conscious of making various preconceptions. (Saunders et al. 2007: 144)

## **5.2. Research Approach**

*Deductive approach* is implemented in the process of the theoretical framework creation, as it provides the possibility to utilize the existing theories on cross-cultural adjustment and self-initiated expatriates in general. However, since there is very little existing knowledge on self-initiated expatriate spouse adjustment and the study is exploratory in nature, the *inductive approach* is utilized to build a new theory. The literature review has shown that there are only a few studies on traditional expatriate spouse's adjustment, whereas the adjustment of self-initiated expatriate spouse is under-researched. Thus, the prior studies on cross-cultural adjustment and self-initiated expatriation has provided only broad guidelines for empirical research while focus now will be shifted on the in-depth understanding of the problem nature.

Due to the lack of studies and theory about self-initiated dual-career expatriate spouse's adjustment *qualitative* method was chosen in order to get an in-depth understanding about the issue (Denzin & Lincoln 2008). This study aims understanding the problem and exploring the issues and factors behind the phenomenon rather than examining

correlations between variables. Therefore, according to Marschan-Piekkari and Welsh (2004), when the in-depth examination of the phenomenon is desired, the qualitative research methods are often used to gain a *holistic approach* and deeper understanding of the issue. Since this study is explanatory in nature, in order to address the research questions of this study, qualitative research methods were employed to investigate what are the main issues of self-initiated expatriate spouses' cross-cultural adjustment as well as to discover what are the factors influencing this process.

### **5.3. Research Design**

This *cross-sectional design* study utilized *semi-structured interview* data collection method and *snowball sampling* technique. The reasoning of these choices and the procedures employed to conduct the research are provided above.

#### *5.3.1. Data Collection Method*

Interviewing is one of the most frequently used data collection method in qualitative research. This data collection technique is based on various types of conversations between researchers and respondents. Of these, one-to-one interview is perhaps the primary form, which is used in many research frameworks and can be relatively variable in style. (Crouch & McKenzie 2006: 484-485) Interviews typically are categorized into three types: structured and standardized, guided and semi-structured, and informal, instructed, open and narrative interviews (Eriksson & Kovalainen 2008: 78-79).

Semi-structured interview in this study as a data collection method was selected due to the fact that the research is aiming to explore and gain an in-depth understanding about the most common issues that the self-initiated dual-career expatriate spouses are confronting, as well as the key factors influencing their adjustment process. This data collection method enabled the interviewer to arrange and reshape the questions during the interviewing process simultaneously, and as a result, the interviewees were able to tell their experiences having more freedom. Nevertheless, even though that both parties were flexible on their questions and answers, it was assured that interviewees were

aware about the topic agreed in advance.

Moreover, semi-structured interviews provide a flexibility to have a list of certain themes and questions dictated by the exploratory framework rather than constraint to ask exactly the same questions in the same order during every single interview. Also, the strength of non-standardized interviews lie in the flexibility to adapt to the individual needs, thus every interview represents a unique perspective of the interviewee. In addition, semi-structured interviews allow when necessary asking supplementary and spontaneous context-built questions which are important for the study but might not be included in the framework. (Saunders et al. 2007: 312)

### *5.3.2. Target Group and Sampling*

The target group of this study is self-initiated dual-career expatriate spouses. The participants of the interview had to meet specific criteria. First, participants had to be self-relocated on an overseas assignment together with their spouse. Though the term spouse is used here, the marriage was not a necessary prerequisite for the participants. Second, the assignment should last at least 6 months since the cross-cultural adjustment process normally takes from 4 to 6 months or in some cases more. Further, the participant's partner had to meet the definition of self-initiated expatriate.

Snowball sampling, which is non-probability sampling technique, was chosen to select the participants of study. "In the exploratory stages of some research projects [...] a non-probability sample may be the most practical" (Saunders et al. 2007: 226). According to authors, non-probability sampling or non-random sampling provides a range of alternative techniques to select samples based on subjective judgement. This sampling technique is appropriate when the objectives of the study focuses on exploring in-depth understanding of the issue and when there is limited resources or difficult to define accurate sampling frame. (Saunders et al. 2007: 226-233)

Snowball sampling was implemented by contacting the initial cases which were already known to the author and then asking to identify further new cases and repeating the process until the sufficient number of cases are collected. It is important to mention that



during the implementation of snowball sampling often the problem of participant bias does occur when participants identify further potential participants similar to themselves, and as a consequence, the sample may be homogenous. “However, for populations that are difficult to identify, snowball sampling may provide the only possibility” (Saunders et al. 2007: 233). To avoid this problem it was assured that the number of initial contacts is relatively high compared to the all sample, and they don’t know each other, which could result in homogeneity.

## **5.4. Data Collection Process**

### *5.4.1. Pre-Interviewing Process*

This section will shortly present the interviewing preparation process including developing the interview questionnaire and gaining access to the participants. First, developing the interview questionnaire design, the interview questions were divided into two parts. The first part of the questions aimed to acquire a general background of the expatriates and whether they had prior cross-cultural experience. The second part of the interview aimed to acquire in-depth understanding of the major issues and factors of spouses’ adjustment. As the semi-structured interview method was used, a certain framework of themes was developed which allowed avoiding a rigorous set of questions and exploring new ideas brought up during the interview. The guidelines of the interview with a questionnaire are presented in the Appendix 6. Before the conducting the interviews two pilot interviews were performed. Afterwards, the guidelines and questions were reviewed and slightly adjusted assuring the clarity and the structure of the questions.

As it was pointed out by Saunders et al. (2007: 324), interview questions should avoid too many theoretical concepts or jargon since the researcher’s understanding of such terms can vary from that of the interviewees, therefore a simplistic structure of the questions and simple terminology was used. However, at the same time it was assured that the researcher and participant had the same understanding. Furthermore, in order to allow the interviewees provide extensive answers, the questionnaire was mostly designed with open ended questions. In addition, *critical incident technique* was utilized

while asking interviewees about their real-life experiences that are relevant to the research questions, rather than asking about abstract concepts. (Saunders et al. 2007: 325)

Data collection method led to the need of gaining physical access to the interviewees. Saunders et al. (2007: 168-169) noted that it is more likely to gain access to the participants when researcher is able to utilize existing contacts, especially where researchers “undertake an in-depth study that focuses on a small, purposively selected sample”. Furthermore, according to author, a relatively easy access to participants helps towards the production of a good-quality work. Therefore, in order to find the potential interviewees the existing network of professional colleagues, friends and family members was initially chosen, which later resulted into a development of new contacts due to the snowball effect.

Pre-survey contacting by telephoning or corresponding via email to the intended participants helped to select a sufficient number of potential interviewees. In order to inform the interviewees about the topic, their role in the research, and to establish credibility an invitation letter (Appendix 5) to participate in the research was sent beforehand. Thus, not only physical access, but also initial cognitive access was gained, which is important for building open cooperation and developing relationship with intended participants (Saunders et al. 2007: 174). The physical access do not always guarantee the collaboration, therefore it was significant to establish trust and relationship which help to gain a better quality of information. Moreover, the interviews were carried out in the informal environment, mostly at the participants’ home which is often perceived as less stressful atmosphere than work.

#### *5.4.2. Interviewing Process*

In this study the interviews were arranged and data collected by the researcher independently. The research data collection took place in Lithuania between the mid-summer and autumn of the year of 2013. The interviewing process approximately lasted from 30 to 50 minutes, interviews were recorded, and anonymity of the respondents was fully guaranteed. As it was mentioned before, the interviews were conducted in

Lithuanian language, thus there were no linguistic difficulties since the both parties were native speakers. The verbatim quotations were translated into English by the author. Study participants were accessed using Skype video call.

Since the purpose of this semi-structured interviewing process was to get in-depth understanding of the participant cross-cultural adjustment experiences, an important role played attentive listening skills and avoidance of projecting the interviewer's own opinion. Furthermore, the method of confirmation was used to test researcher's understanding by summarizing complex explanations and asking whether the interviewees' meaning was understood correctly.

#### *5.4.3. Ethical Considerations*

With regard to the ethical considerations and requirements for the conducting research, which involves human beings, the following steps were taken to protect participants' rights. First, all interviewees were guaranteed a full confidentiality of their responses. The information about confidentiality matters was included in the invitation letter sent via email to participants as well as presented with the instructions before interview process. Second, voluntary nature of participation in the interview and the right to withdraw from the process at any time was underlined. In addition, interviews were arranged at a time that is convenient for participants, and care was taken to make the process as less stressful as possible. Also, Sekaran (2003) noted that it is important to avoid obtrusive questioning and pressing participant for a response when a face-to-face interview is carried out.

Furthermore, as data was processed during a study, appropriate data management security procedures must be undertaken in order to prevent unauthorized access, accidental loss, destruction or damage to the data. The Data Protection Directive (1995), which regulates the processing of personal data within the European Union, states that the term 'processing' shall mean "any operation or set of operations which is performed upon personal data, whether or not by automatic means, such as collection, recording, organization, storage, adaptation or alteration, retrieval, consultation, use, disclosure by transmission, dissemination or otherwise making available, alignment or combination,

blocking, erasure or destruction”.

According to this Directive, personal data should not be processed at all, except when certain data protection conditions of transparency, legitimate purpose, and proportionality are met. In order to guarantee confidentiality of the data after being collected, it is stored in a password-protected memory stick accessible to the researcher only. Lastly, according to the Directive, data cannot be used for other purposes than it was collected for; hence it has to be destroyed after a certain time. The University of Vaasa thesis writing guidelines do not specify the data retention time, however by common practice three years period is generally considered an appropriate amount of time to keep raw data after the study is completed. After this period data will be disposed in a responsible manner.

#### *5.4.4. Collected Data*

The following pages will shortly introduce to the collected data. As it was mentioned above, the research used semi-structured interviews as a mean of data collection. The interviews were started with questions about general characteristics, personal background and previous international experience. The information about the participants' background included their age, gender, education, marital status, host country, time spent overseas, as well as occupation before and after international assignment. However, due to potential anonymity issues this data is not straightforwardly presented in the thesis and used only for the analysis. Further, interview questions about the actual topic were categorized into three main groups, reflecting the motivation, the issues, the adjustment facilitating and inhibiting factors, and the spousal support.

The age of the participants ranged from 23 to 36 years old with an average age of 28. There were six female spouses and four male spouses. The majority of the interviewed dual-career couples were married and three of them had a child. On average the duration of being overseas was more than 2 years and host countries included Finland, United Kingdom, United States, Norway, Ireland, France and Italy. The interviewees were very diverse in terms of their occupation in the host country: e.g., massage therapist,

languages specialist, IT specialist, customer service associate, sales consultant, marketing specialist or PhD student.

Finally, the data was prepared for analysis. The data processing started with transcribing audio-recorded data as a word-processed narrative. All the transcriptions were made within 24 hours since the immediate transcription ensures reliability of the data (Maylor & Blackmon 2005: 345). To facilitate the transcription process Listen N Write program was used. Furthermore, as it was pointed out by Saunders et al. (2007: 475), it is important not only to record exactly what was said, but also try to give an indication of the tone in which it was said, therefore the respondents' non-verbal communication was also marked in the transcript. The transcribed data of each interview was saved using separate file with a code-filename maintaining confidentiality whilst still allowing recognizing important information easily. Once all the interviews have been transcribed, the data was reviewed in order to identify emergent themes and patterns among the responses. NVivo 10 program was used to manage and process the data.

### **5.5. Data Analysis**

The complex nature of the qualitative data collected has implications for its analysis (Saunders et al. 2007: 474), therefore it is important to select the right strategy to analyse the collected data. As it is suggested by Maylor & Blackmon (2005: 349) the extensive data analysis started by thorough reading of the transcripts. Further, in order to organize and manage a mass of information, the data was distinguished into meaningful parts - categories, which allowed exploring and analysing the data systematically. Therefore, after preliminary content analysis, the key initial themes were distinguished in order to provide an emergent structure of how the data will be organised and analysed further. These categories were derived from the existing theory combining with the patterns that emerge from the data. Categorization allowed linking and comparing various statements in that category, though the categories were changing over time: some disappeared or merged, and some merged out of previous categories that became heterogeneous. (Saunders et al. 2007: 475-480)

Based on the research questions, the contents of the data were firstly classified into the

theme of issues of self-initiated dual-career expatriate spouses' adjustment. This part reflected the negative cross-cultural adjustment experiences of their career paths and current assignments. Secondly, the factors facilitating and inhibiting adjustment process were distinguished as separate theme. This part focused on both the positive and negative aspects that influenced the spouses' adjustment on international assignments. In addition, since relatively great amount of information was obtained about the support practices, it was distinguished from the adjustment factors as a separate theme.

### **5.6. Validity and Reliability**

Validity and reliability are essential to ensure the quality of the research. This section will present the issues of validity and reliability to assure the quality of the current study. First, in order to examine whether the findings of the study are really about what they appear to be about (Saunders et al. 2007: 150), the concerns of validity will be discussed. Validity discusses the concerns of accuracy, credibility and trustworthiness of the research (Yin 2009: 40) and it can be categorized into external and internal validity.

*External validity* refers to the applicability of the research to other situations (Mertens 2010) or to the extent of generalizability (Sekaran 2003: 150). The purpose of this qualitative research, however, was to enrich the theory by gaining in-depth understanding about the self-initiated dual-career expatriate spouses' adjustment, so that it can further be tested by quantifying and making generalizations by future quantitative studies. In fact, qualitative research using semi-structured interviews is not able to make generalisations about the entire population when it is based on small number of cases (Saunders et al. 2007: 319). Though this particular study collected 10 different cases, interview-based studies involving a small number of respondents are becoming more common in social science; a small number of cases facilitate the researcher's close association with the respondents, and enhance the validity of fine-grained, in-depth inquiry in real-life settings (Crouch & McKenzie 2006: 484-485).

*Internal validity* refers to the "confidence we place in cause-and-effect relationship (Sekaran 2003: 149) or the "extent to which findings can be attributed to interventions

rather than any flaws in research design” (Saunders et al. 2007: 600). In this study it was important to ensure the validity and accuracy of how the interviews were collected, and the reasoning how the interpretations and conclusions were made. Once the data was collected it was accurately transcribed and translated to English; and during the analysis was carefully read again so that author became genuinely familiar it. Furthermore, internal validity was enhanced by cross-checking the data across the multiple interviews examining whether there are any contradictions, extreme differences or regularities among responses.

*Reliability* refers to the extent to which the data collection techniques or analysis procedures yield consistent findings, where particularly in qualitative research, reliability is concerned with whether other researchers would generate similar information, if the same study was replicated (Easterby-Smith, Thorpe & Lowe 2002). When the findings are derived from non-standardized research methods they do not necessarily need to be repeatable due to the fact that they reflect the situation which may be subject to change during the time, therefore the attempt to ensure that qualitative research could be replicated, would not be always realistic (Saunders et al. 2007: 319). Despite the fact that the possibility to get exactly the same results with replicated research may not be realistic, it was aimed to describe exactly of what, how, where and why have been done. Furthermore, Robson (2002) asserts that there may be four threats to reliability: participant bias, participant error, observer bias, and observer error, which are discussed above.

*Participant bias* may occur when interviewees may choose not to reveal an aspect of the topic that researcher wish to explore, particularly sensitive information that they do not wish to discuss. The outcome of this problem may be that the interviewee provides a partial image of the situation that casts the interviewee in a ‘socially desirable’ role. (Saunders et al. 2007: 318-119) The participant bias issue in this study was minimized by guaranteeing the anonymity and underlying the voluntarily nature of the interviews, therefore none of the participants were reluctant to participate. The interviews did not start straightaway, but after an adequate time spent to build trust and relationship. In addition, interviewer was giving some comments in order to make participant relaxed and open. Also, the interview questions were designed so that interviewers could start

with more general information and then after feeling more comfortable specific issues were asked. Another issue, according to Saunders et al. (2007: 318-119) may occur due the “the time-consuming requirements of the interview process”, hence the realistic information about the time of the interview process was provided in advance so that interviewees were psychologically prepared and willing to collaborate.

*Participant error* may occur when interviewees’ responses may be influenced by various uncontrolled factors. For example, tiredness or stress could be one of the factors; therefore a convenient timing was planned thoroughly to assure productivity of the participants. Since the letters of invitation were sent approximately one week in advance, the interviewees were able to choose the time which fits to their schedule so that the stress of unexpected changes, tiredness or issues undone at work could be minimized.

*Observer bias* “may occur when observers give inaccurate responses in order to distort the results of the research” (Saunders et al. 2007: 605). It may occur, particularly using interviewing method, when the comments, tonality or non-verbal behaviour of the interviewer create bias in the way that interviewees respond to the questions being asked. As interviewer might consciously or unconsciously lead the interviewee to a certain response, the interview questions were designed with open-ended questions, which allowed them to freely express the real opinion. Furthermore, when interviewer is unable to develop trust with the participant, or when his credibility is lacking, the quality of the information may also be limited (Saunders et al. 2007: 318), therefore it was assured that the relationship and trust is built prior the interview.

*Observer error* refers to some systematic errors made by observers. To minimize the observer error prior the actual interviews the questionnaire was pilot-tested in order to refine the questions so that respondents have no problems in answering the questions. It enabled to obtain assessment of the questions’ validity and the likely reliability of the collected data. Moreover, during the interviews additional questions were often asked and method of confirmation used in order to ensure that perceived information is understood correct. (Saunders et al. 2007: 386)































































## 6. EMPIRICAL FINDINGS

This section presents the findings of the collected empirical data. The concise interpretations of the interviews' data will be provided linking to the issues and factors of self-initiated dual-career expatriate spouse's cross-cultural adjustment. Furthermore, direct quotes from the interviews will illustrate the experiences of the spouses and allow gaining a deeper insight into the subject.

### 6.1. Issues of SIE Spouse Cross-Cultural Adjustment

First, a brief overview of what kind of cross-cultural adjustment issues self-initiated dual-career expatriate spouses have encountered during the different stages of international assignments will be provided. The main issues are summarized in the Table 3 differentiating them into two groups depending on the level of how difficult was to handle it for the respondents. Apart from the main issues presented in the table some spouses also mentioned other issues such as relocation and resettlement, infrastructure, geography, language and communication, homesickness and uncertainty.

**Table 3.** Cross-cultural adjustment issues of SIE spouse

	R1	R2	R3	R4	R5	R6	R7	R8	R9	R10
Cultural distance										
Rules & regulations										
Climate and nature										
Social environment & interaction										
Cost of living										
Lack of information										
Work-related issues										
Loneliness										
Children										

 - Was relatively easy to cope  - Was difficult to cope

### *6.1.1. Issues Before the International Assignment*

No major issues were identified before the self-initiated expatriation by expatriate spouses. This is quite understandable due to the fact that self-initiated expatriates differently from organization-assigned expatriates have more flexibility and control of expatriation time, length and destination. However, some minor issues at the pre-expatriation stage included relocation, seeking for employment opportunities, and cost of living in the host country since at the beginning of the expatriation most spouses didn't have jobs and prices were higher than in the home country. Furthermore, one spouse who wanted to follow the partner to the United States had issues with obtaining visa and work permit. Most of the spouses were preparing themselves, learned the language and searched online for important information about the host country. Some spouses had the chance to go for a 'look-see trips', especially those ones who had relatives or friends in the host country. Only a few spouses didn't expect extreme changes of their life and believed that preparation is not necessary. Three spouses mentioned that before the expatriation they contacted other expatriate families who were currently in the particular country and were able to provide useful tips before arrival.

### *6.1.2. Issues During the International Assignment*

Different aspects of culture, climate and social life were often regarded as a barrier of cross-cultural adjustment. Spouses particularly reported the issues of cultural distance or cultural novelty, since they faced various kinds of differences between Lithuania and their host country where the assignment took place. The general environment differences among the countries often included climate and nature, food, various facilities and social environment.

*"In Finland, it was very difficult on a few things. First - climate, because I'm not carrying on the cold. Second - the social life. [...] Me, a person, who was used to emotionally express myself, came into the 'land of ice'. This culture, although seems more advantageous, several things have been really difficult. [...] I also had some issues with food, especially in winter, I am vegetarian."*(R1)

*“There is a lack of activities in UK, especially in the summer when you need to think what to do. Also, I feel a lack of connection with nature. When it’s hot, in Lithuania we were used to go swimming, playing, but here is a lack of places to go and lack of time, and very hard something to plan because everyone is busy, everyone is working hard, so it is not always easy to find a companionship.” (R2)*

Social environment and interaction for many spouses to some extent were unacceptable. Those spouses who were able to find other alternatives for their own interests had more positive adjustment outcomes in the new culture. Other spouses were trying to interact effectively with host country nationals and to understand why they behave the way they do.

*“In Scotland the biggest part of socialization is going on in the pubs and bars which always include alcohol. First, neither me, nor my wife drink alcohol. Second, I don’t want to be among drunk people - for me it seems simply stupid. Thus, for us, a huge part of the socialization culture was unacceptable. [...] We practice yoga, healthy eating and healthy lifestyle [...]. It has been more difficult to create our own social environment with similar people that have common interests, but it was worth.”(R9)*

*“Norwegians are very liberal and open to foreigners. It is the most diverse country in the world, so maybe it’s relatively easier to adjust. However, I found it difficult that Norwegians don’t accept you as a friend easily. [...] Though, about sex, they can talk to anyone! This topic is very popular [laughing]. I feel uncomfortable to talk about it, for me it’s too private topic. [...] Imagine this: our company’s Christmas party... Luxury restaurant... Evening dresses, suits... And Norwegians talk about sex! [Smiling]” (R5)*

At the very early stage of expatriation a few spouses also encountered with housing issues.

*“To find the housing was difficult, we overpaid the rent too much, and this often happens particularly for Lithuanians. A bunch of Lithuanians formed a negative reputation. For example, our landlord was previously robbed by Lithuanian tenants. There are many stories like this, so Norwegians are careful at the beginning. However, now we feel very respected and trusted.” (R5)*

Furthermore, five out of ten spouses mentioned that they encountered with work-related issues. Only two spouses reported that they found the employment relatively easy. It is important to mention, that even though some spouses found temporary jobs, they felt a dissatisfaction and disappointment, because it often included low-skill jobs.

*“Initially, I had to work the very worst jobs. It was not so hard physically as mentally because in Lithuania I was Manager’s Assistant, and here in Norway I started as a cleaner...” (R5)*

Loneliness, feelings of isolation, homesickness, belongingness, separation from friends and family were also expressed as very common sources of strain and dissatisfaction. The most difficult time for the spouses was often at the beginning of assignment, when they had no or very few friends in the host country and the only one person supporting them was the husband or wife.

*“Loneliness was one of the biggest challenges for me. Neither I had many friends in New York, nor was I able to communicate with Lithuania easily since there is seven hours difference. [...]My girlfriend came to US only after seven months, now it’s easier to me.” (R4)*

*“No matter how long we will live here, we will always be strangers. I don’t really feel like I belong to this society”. (R5)*

One spouse mentioned safety issues, since she was several times attacked on the street at night. Furthermore, two spouses also mentioned that it was difficult to adjust because of the rules and regulations in host country.

*“When I came to live in Paris I adjusted very quickly [...] maybe because I had previous experience of living abroad. But the most annoying thing for me was French bureaucracy. For example, I was studying in Helsinki for a couple of years... In Finland when you need something it takes time and lots of procedures, but everything is clear, and you finally get what you need. Meanwhile the French people are ‘inventing’ their own rules and regulations.” (R8)*

### 6.1.3. Issues After the International Assignment

Sometimes it is falsely assumed that after returning back to the home country expatriate spouses are no longer encountering with problems and do not need further assistance. In fact, literature shows that spouses are experiencing re-entry shock, since they slowly become accustomed to living abroad. One spouse, who shared her repatriation experience from previous assignment some years ago, found it hard to adjust back in her home country since she had to deal with reverse culture shock. The spouse mentioned that she has not received any assistance from the company that she was working for and it took relatively long time to re-establish her career. This is perhaps one of the most typical issues that self-initiated expatriate spouses have to deal after international assignment due to the fact that, unlike the organizational expatriates, they have no companies waiting them to come back and keeping previous positions. However, there were no further cross-cultural adjustment issues identified after the international assignments simply due to the fact that all the interviewed spouses were currently on the assignment.

*“When I adapted overseas and came back to Lithuania it had been very difficult. First, social environment and communication was very different. Also, practical things: after living in a country where is lots of chaos, sometimes you forget that you must go only through the passage on the street, or that you cannot call a taxi on the street, or that things are done not through a bribing [...] Although it is said that there is a lot of corruption in Lithuania, compared to the country I was, hypothetically, in Lithuania there is no corruption.” (R1)*

## 6.2. Factors of SIE Spouse Cross-Cultural Adjustment

As it was discussed previously, cross-cultural adjustment includes three different levels of adjustment: environment, interaction and personal adjustment. Moreover, adjustment is influenced by four groups of factors: individual factors, non-work factors, organizational factors and job factors. This framework which was broadly discussed in the theoretical part fits with the current findings and will be used when presenting the factors facilitating or inhibiting self-initiated dual-career expatriate couples' adjustment.

### 6.2.1. Individual Factors

The individual factors influencing self-initiated dual-career spouses' adjustment are summarized in the Table 4. Without exception, all the spouses asserted that knowledge of the local language and open-mindedness are unambiguously facilitating adjustment. Also, among the most commonly mentioned individual factors that facilitate spouses' cross-cultural adjustment were mentioned motivation, willingness to communicate, previous international experience and self-initiated training with an exception of one spouse who explained by her experience that the last two factors may have both positive and negative effects.

**Table 4.** Individual factors of SIE dual-career spouse adjustment

	R1	R2	R3	R4	R5	R6	R7	R8	R9	R10
Motivation										
Willingness to communicate										
Previous international experience	 									
Knowledge of the language										
Open-mindedness										
Children										
Self-initiated training	 									

- Negative influence    - Positive influence

The first individual factor indicated in the table above is motivation. As it was discussed previously SIE dual-career couples' motivation may be different from the one that have organizational expatriates. Motivation refers to the attitude toward living abroad and it is an important factor in the willingness to relocate since the individual's attitude to living overseas directly influence adjustment efforts and interaction (Simeon & Fujii 2000). Therefore, the interviews usually started with acquiring the information whether the spouses had a strong personal motivation and enthusiasm to move overseas. The

main reasons and motives of self-initiated expatriation were to gain international experience, new career opportunities, personal development, adventures, new culture, different lifestyle, and financial reasons. Some of the most typical reasons and motives of self-initiated expatriation are presented in the quotations below.

*“Mainly financial reasons [...]. But also I went in order to broaden my horizons and try something new.” (R2)*

*“As people say, USA is the land of opportunity – so I was motivated to have great career opportunities here, I wanted something new in my life, and I wanted to experience adventures of a lifetime!” (R4)*

One male spouse reported that the main and perhaps the only one motive to expatriate was his girlfriend’s career. He had a job in the home country, but he had to resign in order to follow the girlfriend to the United Kingdom. His motivation was rather negative, since his own wishes were not the dominating factors in the decision to expatriate.

*“I went to Scotland because I didn’t want to lose relationship with my girlfriend. At the beginning she left alone, I arrived to her only one year later. Now, I think it was a huge mistake, we should have gone together, because the relationship on distance had been terribly difficult.” (R7)*

Knowledge of host country language is probably one of the most important and one of the most difficult cross-cultural adjustment factors that SIE spouses has to deal with, since it consists of not only speaking and understanding, but delicacy of non-verbal communication. One spouse reported that for her “[...] *most complicated part of adaptation – is language adaptation*” (R3), who found that even intermediate level of her Finnish language skills was not enough for a free integration into the community. Another spouses reported that although the language is not always a barrier, it helps better to integrate into the society.

*“Norwegians speak English perfectly, so at the beginning I didn’t feel language barrier, but over time I realized that in order to fully integrate into society, it’s necessary to learn Norwegian.” (R5)*

Furthermore, the findings suggest that personality is playing an integral role in spouse's cross-cultural adjustment. One of most often mentioned personality characteristic influencing adjustment positively was open-mindedness. In this context open-mindedness is understood as individual's receptiveness to new ideas, new environment, and new people. Individuals with high level of open-mindedness are more curious for learning and engaging in social interactions more often. One spouse distinguished open-mindedness as the most significant factor.

*“To be tolerant and open-minded, I believe, is the most important. If you are not open-minded, it will be difficult to accept other people who are different from you and you will hardly ever adjust.” (R3)*

Another personality trait - willingness to communicate - was found as a very positively cross-cultural adjustment facilitating factor.

*“I think it's necessary to participate in the country's life, to be open. For example, I am from Lithuania and my husband is from Italy, there are many people from our countries in UK; you only need to find them. [...] Even with the neighbours to talk more often is a must for you to feel truly at home” (R2)*

*“In order to adapt, it's important not to be closed inside your comfort zone. [...] For example, I have Spanish colleagues, who mostly communicate in their own circle, but I try to communicate with everybody even though it's difficult at the beginning.” (R6)*

In contrast, one spouse reported that her unwillingness to communicate had very negative effects on cross-cultural adjustment.

*“During the first half a year I unconsciously isolated myself. I had no social life. I had no friends. I was living in the computer. Skype and Facebook were my best friends since I wanted to be with my family and friends [...]. Now I realize making a huge mistake – I should have socialized with the new environment.” (R7)*

Although literature suggest that previous international experience has only a weak impact on cross-cultural adjustment of expatriate employees (Bhaskar-Shrinivas et al. 2005), most of SIE spouses reported that previous experience abroad had a strong effect on adjustment. Results shows that previous international experience facilitates cross-



cultural adjustment in a way that individuals are able to extrapolate the information that helps predict and anticipate what to expect in a new country. Most of the spouses stated that their previous international experience was very helpful.

*“My first international experience was in 2007 as an Erasmus exchange student in Finland. Later through the Board of European Students of Technology - a student non-profit organization - I went for training courses to France, Italy and Slovakia. I also studied Master’s degree: half-year in Denmark, half-year in Sweden and half-year in Finland. Now I live with my partner in Finland and I must say that previous experience certainly helped me to adjust.” (R3)*

*“Due to the fact that I had international experience I went overseas being more confident. You know, my English was more advanced... I had experience of communicating with ethnically diverse people, so with courage and confidence I went to England.” (R2)*

However, in some cases previous international experience may lead to unrealistic expectations. This can be illustrated by the experience of one spouse who reported that her previous international experience determined too high expectations of easy adjustment:

*“Before I moved to Finland, all the time I was thinking that if I adjusted in some more geographically and culturally distant countries, Finland will be a piece of cake, but it appeared to be untrue. [...] Finland looks a lot closer; it is a Scandinavian country in which the mentality seems to be familiar. [...] So, I thought how easy it should be to adapt in Finland!” (R1)*

Children perhaps are questionable factor determining spouse adjustment as there is no clear trend among different opinions. Some spouses who did not have children reported that having a child may influence their future decisions to return from assignment. However, in reality those spouses who had children reported having no major issues with raising a child in a foreign country. It may also depend from country to country: for example, one male spouse reported that for him Italian culture is very acceptable and he would love his children to grow up in this country. Likewise, some other spouses believed that their children have more opportunities and better education in the host country.

*“Child can be born in Finland. But when it will be time to go to kindergarten, we want to leave, because a child quickly emulates the environment. [...] We would like the children to grow in their family environment. [...] Otherwise, the child feels between the two worlds. [...] On the other hand, it depends in which city you live; for example, in Helsinki there are international schools. [...] For us, it is important not only how well a child is provided with education, but also with national identity formation.” (R1)*

*“For our family is unacceptable Norwegian diet - lots of junk food, few vegetables in the kindergarten. But it’s perhaps the only one difficulty raising a child, we don’t have major problems”. (R5)*

Some spouses indicated that they had self-initiated training and were preparing for the expatriation beforehand. Researchers believe that training is important for a better spouses’ adjustment, since they experience extreme changes of a postponed career, a different language, different culture and other issues. However, in case of self-initiated expatriation very few spouses receive training from the companies, thus spouses noted the importance of self-preparation before the international assignment. However, regarding self-initiated training one spouse mentioned that attention should be kept not on learning a set of rules, but focusing on adjustment strategies.

*“I was doing homework. I learned the language; I was interested in the local culture and customs. It helped. But once you arrive to the country, you realize that often the reality is different. [...] If you do not take it for hundred per cent – then it is fine. But if you think you will learn a set of rules and that’s it - I will adapt, it is really not like that. What training should really focus on, it is the strategy how to adapt.” (R1)*

### 6.2.2. Non-Work Factors

Spouses were asked about how different were the general living conditions, everyday life customs, general living costs, available food, health care facilities and transportation systems from their home country. In addition, when spouses were asked what factors have facilitated their adjustment overseas, being involved in many activities and going for a ‘look-see trip’ before the actual expatriation was mentioned by most of the

spouses. As it was expected, the most critical determinant of expatriate's well-being and adjustment was their spouses' satisfaction and adjustment. The key non-work factors of SIE dual-career spouse adjustment are summarized in Table 5.

**Table 5.** Non-work factors of SIE dual-career spouses' adjustment

	R1	R2	R3	R4	R5	R6	R7	R8	R9	R10
'Look-see trip' before IA		👍	👍		👍		👍			👍
Cultural novelty	👎	👎	👍	👎	👎	👎	👎	👎	👎	👍
Spouse adjustment	👍	👍	👍	👍	👍	👍	👍	👍	👍	👍
Standard of living	👍👎	👍		👍	👍			👍	👍	👍
Being involved in many activities	👍	👍	👍	👍	👍	👍		👍		👍

It was indicated that 'look-see trips' help reducing the uncertainty about the host country environment despite the fact that it can be expensive and time consuming. Spouses who visited the host country prior the actual self-initiated expatriation found it useful as they already knew what they can expect. For example, one spouse reported that she already had relatives in the host country, thus she went for a 'look-see trip':

*"It should be mentioned that my two brothers were here, initially we came to them. I already knew what's waiting for us, so we went more confident."* (R2)

Cultural novelty, also known as cultural distance or culture toughness (Black et al. 1991), refers to the cultural difference between the host culture and the home culture. In the literature it is assumed that the more novel the culture is the more difficult is the adjustment process. To examine whether this factor influenced spouses' adjustment respondents were asked to describe how different was the host country from the home country and how they perceived these differences. Although most of the spouses indicated that cultural novelty has inhibited their cross-cultural adjustment process, one spouse considered cultural novelty as a rather positively cross-cultural adjustment influencing factor.

*“In my opinion, despite the short geographical distance, Finland differs from Lithuania significantly. But I like that Finnish people are different. In Lithuania, the mentality of the people, especially among the older generations, is influenced by the Soviet Union times, while Finnish people feel free in many aspects of their life. Finns don’t need to show off. Finn can ride a simple car, live in a modest house - they don’t need to show their status. Meanwhile Lithuanians are used to spend their last cents for expensive car, or three-store ‘castle’ to demonstrate their status [smiling].” (R3)*

Spouse satisfaction and adjustment was found to have a mutual impact towards both directions, since spouses reported that better adjustment of the partner has impact for the success of their adjustment and vice versa.

*“My husband is Italian. He had lived in England before, so he was more adjusted and helped me to adjust; I didn’t feel as thrown into the cold water [...] I did not have to start completely from scratch. He was a connection between me and the new environment, new people.” (R2)*

*“My adaptation clearly has an impact to him. If my husband saw that I cannot adjust, he would automatically look at the job as a temporary. [...] However, it is important to realize that both spouses will have a different pathway to the new country. Both must support each other psychologically, but you do not have to always know how to help, or how to make him adjust better. Or be disappointed that he adapts more successfully than me, because the situation can change quickly.” (R1)*

Standard of living and living conditions, according to Black (1991) are important determinants of spouse cross-cultural adjustment. Although the high standard of living usually influences the adjustment positively, for temporarily unemployed spouses high standard of living can also associate with high costs of living and influence adjustment negatively.

*“When I went to the store the first time and bought a couple of tomatoes and bread for ten euros - I was in shock! [...] We came from the country of lower economic development level and our savings were limited so at the beginning it was very challenging.” (R1)*

Finally, being involved in many activities regardless of the type of activities and

keeping themselves busy may positively influence the adjustment to the new environment and help to accept the new life more easily.

*“When you are very busy and do not have much time to think, especially when I was studying and working at the same time, I had no time to think about any culture shock”.* (R2)
























### 6.2.3. Organizational Factors

Among the organizational factors (Table 6) dual-career spouses quite often mentioned that the diversity and equal opportunity policies have a positive influence for better adjustment in organizational environment. Some spouses also expressed their opinion that encouraging organizational culture and provided career opportunities motivates to adjust better. For example, one spouse who had been promoted three times during the period of two years reported that she was very motivated to do her best and adjust more quickly. Contrarily, these spouses who were dissatisfied with organizational culture found it more difficult to adjust.

*“In the work environment I don’t have much difficulty [...]. Although the company operates in the UK, it is American MNC. Company stands for employee equality and diversity; it doesn’t matter whether you are black, white, homosexual, British or Lithuanian – everyone is equal.”* (R9)

*“Here in New York I don’t feel a team spirit in my company; little communication with colleagues. [...]From the technical side, I received a lot of support from the very first days: a new laptop, new blackberry, and my own business cards, express visa card, lots of technical information, and so on... But you as a person need something more than just a technical stuff, we are not robots...”* (R4)














**Table 6.** Organizational factors of SIE dual-career spouse adjustment

	R1	R2	R3	R4	R5	R6	R7	R8	R9	R10
Organizational culture										
Organizational support										
Co-worker support										

#### 6.2.4. Job Factors

Job factors (Table 7) according to the literature are these ones over which expatriates have little control, and often include role clarity, role conflict, role novelty, role ambiguity and role discretion. Though some of the SIE spouses are either not working during the assignment or have not distinguished job factors, many dual-career expatriate couples experience different role conflicts (Mäkelä, Käsälä & Suutari 2011) and are often challenged by work-life balance concerns (Mäkelä, Suutari & Mayerhofer 2011).

**Table 7.** Job Factors

	R1	R2	R3	R4	R5	R6	R7	R8	R9	R10
Role conflict										
Role underload										
Role overload										
Role discretion										
Role clarity										

One spouse during the international assignment experienced a role conflict at her work.

*“As I worked with my future husband, the challenge was the fact that we had a conflict between personal and work relationships. Everything got even more complicated since I was his subordinate.” (R2)*

Furthermore, Morley and Flynn (2003) found that role overload is negatively correlating with work adjustment, interaction adjustment and overall adjustment. Specifically, employees who have heavy workloads and are unable to create a balance between work and family roles are emotionally exhausted (Karatepe 2013). However, contrary to these findings, one spouse suggested that too little responsibilities and insufficient role discretion may also influence adjustment negatively.

















*“Now I am working in New York, one of the biggest consulting companies in the*

*world, but I feel that I don't have enough duties and responsibilities as I had in my previous company in Lithuania. [...] Also, if I had more role freedom and role discretion, I would be able to learn and adapt faster. [...] Here I am just a small cog in the large wheel of a business, so sometimes I start to wonder – maybe I could achieve in Lithuania more than in USA?” (R4)*

### 6.3. Support for SIE Spouse Cross-Cultural Adjustment

Despite the fact that organizational support was not the main focus of the research, SIE spouses were asked about what kind of support they received, if any. In case there was no or little support received from organisations, social networks or any other kind of sources, the questions were addressed in order to focus on SIE spouses' opinions about how their needs could be met if any spousal assistance was provided. As literature suggest some organizations may provide informal or informal cultural training, language training, co-worker support and integration to local support systems. When spouses were asked what kind of support they would appreciate to receive most often cultural training and language courses were mentioned. One spouse mentioned that it would be useful if the company could provide some newsletters with useful information such as where to locate a doctor, where to find important authorities, or how to look for a job, build resume, and other practical things. Organization support is summarized in the Table 8.

**Table 8.** Organization Support

	R1	R2	R3	R4	R5	R6	R7	R8	R9	R10
Cultural training										
Language training										
Co-worker support										

Spouses received very few of organization support. The actual support that spouses received from companies was too little to indicate a recognizable influence on cross-cultural adjustment. Moreover, those spouses who have not received any or very little support adjusted at least equally with these spouses who received a certain level of

support. Nevertheless, the majority of the spouses expressed their opinions that support would be highly appreciated.

*“Although we haven’t received much support from the company, I believe it would be useful to both the employee and the spouse, and also for the company itself, as it would make a good impression of the company. If the company invests in its employees, it is likely that they will remain in the company for a long time and perform better.” (R10)*

Perhaps the main source of support within the company was informal support from co-workers. Although it was not co-workers’ task to help the expatriates, spouses reported that this support was essential for their adjustment. Furthermore, one spouse was working at the same company with her husband and received support both as a regular employee and as a spouse.

*“All the time I was provided with informal training from the manager, who was always committed to help on various cultural and technical issues. And as an employee, I received support which was done face-to-face. [...] First it was initial training, and then learning on the job.” (R2)*

*“My company provides various skill development courses. Mainly it’s for the employees, but their spouses are also welcome. Courses are funded 50% by the company. My husband took advantage of such courses [...] it really helped him to get a job.” (R8)*

However, it is important to mention that some respondents consider the cultural training for SIE spouses as relatively useless, particularly when the attendance is not voluntarily.

*“I think that it is a relatively meaningless. Of course, it is not completely useless, but with a condition that a person truly wants training, if he realizes that he needs this. But if you go to the training just because your husband is being sent somewhere, and you need to complete the training, as if it was mandatory, then all the training is hopeless.” (R1)*

Organizational support was not the only one source of support that spouses received. Due to the fact that most of the spouses received little support from the companies, they were seeking for other support alternatives. Important sources of support were social





















ties, which can be divided into contacts in home country and contacts in host country (Table 9). Spouses emphasized the importance to keep in touch with the family and friends for their well-being and comfort. Respondents kept close contact with home country via phone and internet, and were going home to visit their family once in a while to alleviate homesickness. In the host country spouses also tried to build social contacts by participating in different social activities, clubs and communities.

Spouses reported that the support from various networks in the host country had a greater influence than support and communication from the home country via Internet. These results correspond with the previous research carried out by Beck (2012: 148) who found that spouses often have contacts with the national culture through activities of daily living but they frequently seek for social support in the host country surrounding. According to one spouse (R3), *“It is also useful to make contacts with other employees and their spouses and learn from their experience as they did adapt.”* In addition, some spouses mentioned that public and non-government organizations can be a great source of support.

*“The CV which I used in Lithuania did not look very professional in UK, so a friend of mine showed me a location called “Skill Development Centre” - a non-government organization which provides free of charge services. They helped me to make my CV more professional and advised on other issues. It helped me a lot. Soon I got the job I wanted.”* (R9)

**Table 9.** Other Support

	R1	R2	R3	R4	R5	R6	R7	R8	R9	R10
Social Ties in Host Country										
Social Ties in Home Country										

#### 6.4. Supplementary Findings

Those spouses who were employed during the expatriation from the very beginning indicated that their adjustment was relatively easy. Although not all the spouses were employed after arrival to the host country, they were looking for different options to get

involved in different activities. For example, one spouse decided to study at the university while her partner was working. Another SIE reported that volunteering had a positive impact for his wife cross-cultural adjustment.

*“Volunteering has helped a lot to adapt for my wife at the beginning of our expatriation. Near our home there was a Community Centre which aims to help socially sensitive people. I saw an ad that they are looking for volunteers, so I suggested to my wife. She was very happy to work there because of a great atmosphere [...]. Later on she rented a workshop and started her own jewellery business.” (R9)*

Further, it must be mentioned that there were no major adjustment differences noticed among female and male expatriate spouses. However, as the theory suggests different genders may play important role for dual-career couples' adjustment and work-life balance. Although comparatively small number of male spouses was interviewed, it was noticed that social role conflict and sex/role issues still exists among a few couples and might be an issue among the partners in the future. These findings coincide with other similar findings (e.g. Cole 2011: 1509) suggesting that nowadays male spouses may be forced into a non-traditional role as a 'househusband' and will become more financially dependent on the female expatriate, which obviously can result in a difficult psychological consequences for the male accompanying spouse, negatively affecting his cross-cultural adjustment.

*“If both spouses are working, they probably earn more money. But you cannot cook at home, you eat fast food, wash clothes only on weekends, shortly - you cannot be in the harmonious environment. Therefore, when both partners are seeking careers, the divorce rate is higher. [...] In my opinion, a woman don't need to work, she has to inspire the man, so that he would earn as much as needed. [But your wife is successful businesswomen - would you refuse your career if you had to?] In principle, yes... But then, psychological issues will arise: what a man will do at home? When a man begins to perform women duties, is he going to feel good? Man's nature is to act, to solve...” (R9)*

## 7. DISCUSSION

This section will discuss the results of the present study with reference to the theoretical background. The purpose of this study was to identify the main issues of self-initiated dual-career expatriate spouses' cross-cultural adjustment and the key factors that either facilitate or inhibit adjustment. Hence, the research questions were addressed as follows:

1. What are the main cross-cultural adjustment issues of self-initiated dual-career expatriate spouses?
2. Which factors facilitate or inhibit self-initiated dual-career expatriate spouses' cross-cultural adjustment?

Prior to the present study there was very little understanding what issues SIE couples are experiencing during at various stages of their expatriation. Thus, in order to answer the first research question, open-ended questions were mostly used during the interviews in order to gain an in-depth understanding about the most satisfying and stressful aspects related to self-initiated expatriate spouses' lives. The results revealed that the most common adjustment issues which SIE couples experience during their assignments overseas are related with cultural distance, rules and regulations, climate and nature, social environment and interaction, cost of living, lack of information, work-related issues, loneliness and in, fewer cases, children related issues.

To organize and analyse the collected data regarding the second research question of the SIE spouses' cross-cultural adjustment factors, the previously suggested cross-cultural adjustment factors' classification by Black and Gregersen (1991) was utilized in this study. Thus, it was assumed that cross-cultural adjustment of self-initiated dual-career couples are influenced by four groups of factors: individual factors, non-work factors, organizational factors and job factors. Although these factors were already clearly explained and defined in the existing cross-cultural adjustment literature, Beck (2012: 6) pointed out that it was not clear whether there are any similarities between the adjustment of SIE and the AEs spouses.

It is worth noting that the most often mentioned factors positively influencing adjustment were individual factors: motivation, willingness to communicate, previous

international experience, knowledge of the host country language, open-mindedness and self-initiated training. Among the non-work factors most often were mentioned successful spouse adjustment, 'look-see trips' before the international assignment, standard of living and being involved in many various activities. The job-related factors that positively influence adjustment were role clarity and role discretion, although it must be pointed out that not all the spouses were fully employed during the assignment. As a negatively adjustment influencing factors spouses most often mentioned non-work factors - cultural novelty, organizational culture, and also job factors - role underload, role overload and role conflict, whereas some individual factors such as having children might be neutral as there was no clear tendency among the answers.

Although organizational support provided by the companies has a positive influence on spouses' adjustment, assistance was relatively scarce to have a recognizable effect on spouses' cross-cultural adjustment and deeper conclusions cannot be made at this point. Bearing in mind the gap among the actual received support and the desired support, the demands from the self-initiated dual-career couples were reasonable, since most of the spouses expressed their understanding that, differently from organizational expatriates, they have equal rights with the host country nationals and in most of the cases support is just simply impossible.

Furthermore, cross-cultural adjustment according to the previous studies (e.g. Black 1989) is positively related to the degree of spouses' motivation. The rationale behind this relation is that the more motivated and positive towards going overseas spouses are, the more determination they will put into adjusting to the new environment (Black 1990). This is consistent with the present findings since most of the spouses noted the importance of their motivation prior and during the assignment.

Findings also complement the previous studies which suggest that language proficiency is positively influencing adjustment. This could be due to the fact that language skills help to build and foster interpersonal relationships in the host country. However, though language proficiency is necessary, it is not a sufficient condition for successful cross-cultural adjustment (Hedo 2007). Findings suggest that solely the language proficiency cannot affect the adjustment if there is a low willingness to communicate. In fact, this

complements with previous findings stating that “willingness to use the host country's language has a greater influence on successful adjustment than does actual level of fluency in the foreign language” (Mendenhall & Oddou 1985: 42). Findings also complements with previous research by Shaffer and Harrison (2001) who found that a great impact on adjustment come from the spouses’ ability to build relationships with host country and adapting to the local customs.

Another worth noting point is that majority of self-initiated expatriate spouses who had any previous international experience reported that it has facilitated to their cross-cultural adjustment in a new country. However, there is no clear answer in the literature whether previous international experience influence cross-cultural adjustment or not. For instance, Black (1988) who was investigating American expatriates in Japan found that the relationship among these two variables is non-significant. Meanwhile, other authors such as Bhaskar-Shrinivas et al. (2005) suggest that previous international experience has only a weak impact on adjustment. That previous international experience has only a weak impact on adjustment was also found by Hechanova et al. (2003). In contrast, Park and McEvoy (1993) found that previous international experience significantly correlates with general adjustment. Therefore, the findings of various scholars differ and contradict considerably.

According to the author’s subjective opinion and the evidence of the presented findings, this phenomenon could be called as a previous international experience paradox, which could be explained as follows. Normally, when the previous international experience is gained in relatively culturally-close countries, experience can be fairly easily extrapolated for adjusting in a new country. However, when the experience is gained in a very culturally-distant country, it may lead to unrealistic and inaccurate expectations when attempting to adapt in another culturally different country since various aspects of living in one country are not always applicable to another. This could be explained by the case of the spouse who had previous international experience in the Middle East where she adjusted rather successfully. Later on, when she expatriated to Finland which is relatively closer to her home culture, she had over-expectations to adjust easily, which resulted in some certain disappointment and relatively worse adjustment than expected. Therefore, having lived overseas in one culture does not always serve as an

adequate basis of accurate expectations.

As it was recommended by the mentioned spouse, hiring managers and organizations instead of solely focusing on previous international experience as a predictor of employees' adjustment should take into consideration how well they are equipped with acculturation strategies and how are they going to deal with adjustment issues. For example, Yu and Wang (2011) who investigated acculturation strategies of Chinese students in Germany found that males more often prefer separation strategy while females predominantly choose integration strategy, which results in different adjustment outcomes. Thus, according to Lineberry (2012: 90) hiring managers instead of only rhetorically asking "How adjusted are you?" should also ask "How do you adjust?" since different individuals use different adjustment strategies on which depends their future performance and results. Author suggest, that "the ways that expatriates tackle the challenges of life abroad are varied, and this variety must be understood if we are to understand and improve the experience of expatriate life" (Lineberry 2012: 90).

## **8. CONCLUSION**

This final section will present the theoretical contribution of the study, a brief summary of the results listed from the findings, managerial implications, limitations of the study and suggestions for the future research.

### **8.1. Theoretical Contribution**

The study was aiming to identify the main issues of self-initiated dual-career expatriate spouses' adjustment and compare the findings with the existing studies of traditional expatriate spouses' cross-cultural adjustment. Furthermore, it was aimed to explore what are the specific factors facilitating and inhibiting SIE spouses' adjustment and compare with the existing factors of traditional expatriate spouses adjustment. The study has reasoned how important is the in-depth understanding of the issues of SIE spouse's adjustment and analysed the potential factors facilitating or inhibiting the adjustment process of this particular group of expatriate spouses, whose adjustment has never been studied so far.

The study has contributed to the understanding of how different factors of adjustment influence the success or failure of SIE spouses' international assignments. Taking into account different facets of cross-cultural adjustment, a set of propositions for a successful self-initiated expatriate spouses' adjustment were derived. In addition, theoretical review of several adjustment models (Black et al. 1991, Lazarova et al. 2010) was utilized as a starting point in developing assumptions on which specific factors can influence SIE spouses' adjustment. Furthermore, a comprehensive analysis has been conducted of how self-initiated expatriates differ from traditional expatriates and what characteristics distinguish them from other migrants. This study also presents a contribution to the research of SIE spouses from developing economies, which received inadequately little attention so far. Finally, this in-depth qualitative study providing new knowledge and a rich source of ideas encourages the future researchers to further investigate self-initiated expatriate couples' adjustment particularly on the international scale.

## **8.2. Summary of the Results**

So far the majority of scholars have been focusing on these spouses who are trailed by company-assigned expatriates, while self-initiated expatriate spouses have not received specific attention and were overlooked for a long period of time. Only recently expatriates were distinguished as heterogeneous group. Taking into account the apparent differences among organization-assigned and self-initiated expatriates the empirical evidence provide practical suggestions of how companies can improve their expatriate policies and build support mechanisms to better attract and retain talent.

The findings show that spousal adjustment during the self-initiated expatriation is always a great concern. If the spouse is unhappy and unable to adjust to the new culture, there is a great risk of assignment failure. However, in case of self-initiated expatriation it is very difficult for the company to intervene into family related issues and to determine how much to get involved. Most of the self-initiated expatriate spouses suggested that companies should be more flexible and try to understand the whole family, but most of the time it is not possible, or companies are simply reluctant to dig into personal and family issues.

The results of this study also provide evidence that self-initiated expatriate spouses' adjustment is determined by autonomous motivation to expatriate, which often includes better career development opportunities. Self-initiated expatriates, differently from assigned expatriates, make their own decisions of where, when and for how long to move internationally. Thus, the desired geographical location, the right timing, and the length of the expatriation are often under control of the SIE dual career couples.

## **8.3. Managerial Implications**

Literature review revealed that due the recent increase in focus on strategic management of the global talent organizations should pay far more attention to SIEs in their recruiting efforts since they appear to be equally or even better cross-culturally adjusted compared to AEs. Furthermore, companies can reduce costs and meet their talent needs by hiring SIEs rather than AEs. However, a crucial implication for management at this



point is to ensure that the employees are better equipped to cope with cultural differences (Barratt, 2001), and particularly according to Cerdin (2013: 71) take into account the differences among the SIEs and AEs. According to author, companies should be conscious that if they hire SIEs in one country, they may not wish to be transferred to another country, since it was the result of their own decision to be in that particular country. Thus, talent management of SIEs is more delicate and complicated matter than for AEs (Cerdin 2013).

The empirical findings of the study suggest that regardless how big or small organizations are, managers should remember that all self-initiated dual-career expatriate couples are facing adjustment challenges, thus their support is always needed and welcomed. In fact, some small or medium size companies may not even have an HR department and existing support policies. However, companies can utilize relatively low cost tools of support such as providing useful information about employment opportunities or introducing to the other expatriate spouses who are willing to share their experiences. The assistance in spousal adjustment can give the organizations a strategic advantage over competitors in a way that they will be able to attract and retain talent more effectively.

Before making the decision to hire self-initiated expatriate the company should take a careful consideration in the selection process. If possible, it is recommended that both spouses would be interviewed in order to investigate their level of motivation, language skills, open-mindedness, willingness to communicate, the nature of their previous international experience and how they are able to deal strategically with adjustment challenges. As it was discussed before, managers should take into account that previous international experience is not always an accurate predictor of the success of assignment, especially if the expatriate was working abroad many years ago in a culturally distant country compared to the country where s/he is currently being hired. Moreover, it is important that the potential candidates would have realistic expectations about the host country, since too high expectations may result in long term dissatisfaction and even assignment failure.

Further, depending on the companies' possibilities and resources the potential ways to

assist self-initiated expatriate spouses may involve general support of finding accommodation, assisting with opening bank accounts, consulting on everyday issues and key amenities like schooling, healthcare, and transportation. As the results show the involvement into many activities allows spouses not to feel isolated and adjust better, therefore companies could provide contacts with local employers, universities, societies, centres of skill development, clubs and other organizations. Particularly important is to provide practical cross-cultural skill training that addresses the cultural differences, language training, developing support networks in the community, social support, mentoring, orientations, informal counselling and sponsorship of social gatherings. However, desired assistance may vary from spouse to spouse depending on personal drivers, thus companies should try to understand and comprehend to what kind of support is really needed in order to use company's resources efficiently.

#### **8.4. Limitations**

A small sample size and qualitative approach do not allow to making broader generalizations about the findings of this research. Other family members, children and employing organizations were not interviewed. Furthermore, it is assumed that the interviewees answered the questions in an honest manner, and provided open and realistic answers. However, there is always a probability that some expatriates skewed their answers in order to appear that they were well adjusted.

All self-initiated dual-career expatriates were from Lithuania, a developing country with a very small domestic market and high level of migration. As it was indicated by Cao et al. (2013: 57) country of origin is a significant consideration in the research field of self-initiated expatriation, because the motivations for moving overseas and returning to the home country can vary depending on expatriates' home country. Hence, due to the fact that all study participants are Lithuanians, it limits cross-national generalizability of the results. Due to the fact that all the interviewed spouses are sharing the same nationality, it leads to cultural and societal limitations of the study.

The number of the interviews is relatively small for this type of study and some certain misleading perceptions of the interviewees may have occurred. However, after ten in-depth interviews it was decided to complete data collection process due to the fact that no new insights and observations into the topic were gained. Finally, the lack of researcher's experience in conducting interviews may have had influenced the quality and the amount of collected data. Finally, although the characteristics of the self-initiated expatriate spouses such as age, gender, marital status, number of children, education, occupation, country of expatriation and previous international experience were identified during the interviewing process, no statistical generalisations can be made due to a small number of responses.

### **8.5. Suggestions for Future Research**

Taking into consideration the limitations of the study presented above, it is clear that further studies of the self-initiated expatriate spouses' adjustment are needed. Firstly, more qualitative studies are needed on the international scale to track any cultural impact since the factors influencing spouses' adjustment may be varying from country to country. Secondly, future research could also focus on the existing SIE spouses' support differences among different organizations and how management of the spousal adjustment issues is approached in practice. Thirdly, the adjustment of the SIE spouses perhaps is not gender neutral, thus a comparative studies in terms of gender would be valuable. Lastly, there is a contradiction among different scholars who examined the relationship between spouses' previous international experience and cross-cultural adjustment. As it was suggested by author in the discussion part there might be an existing paradox among these variables, therefore this topic is worth extra attention of future research.

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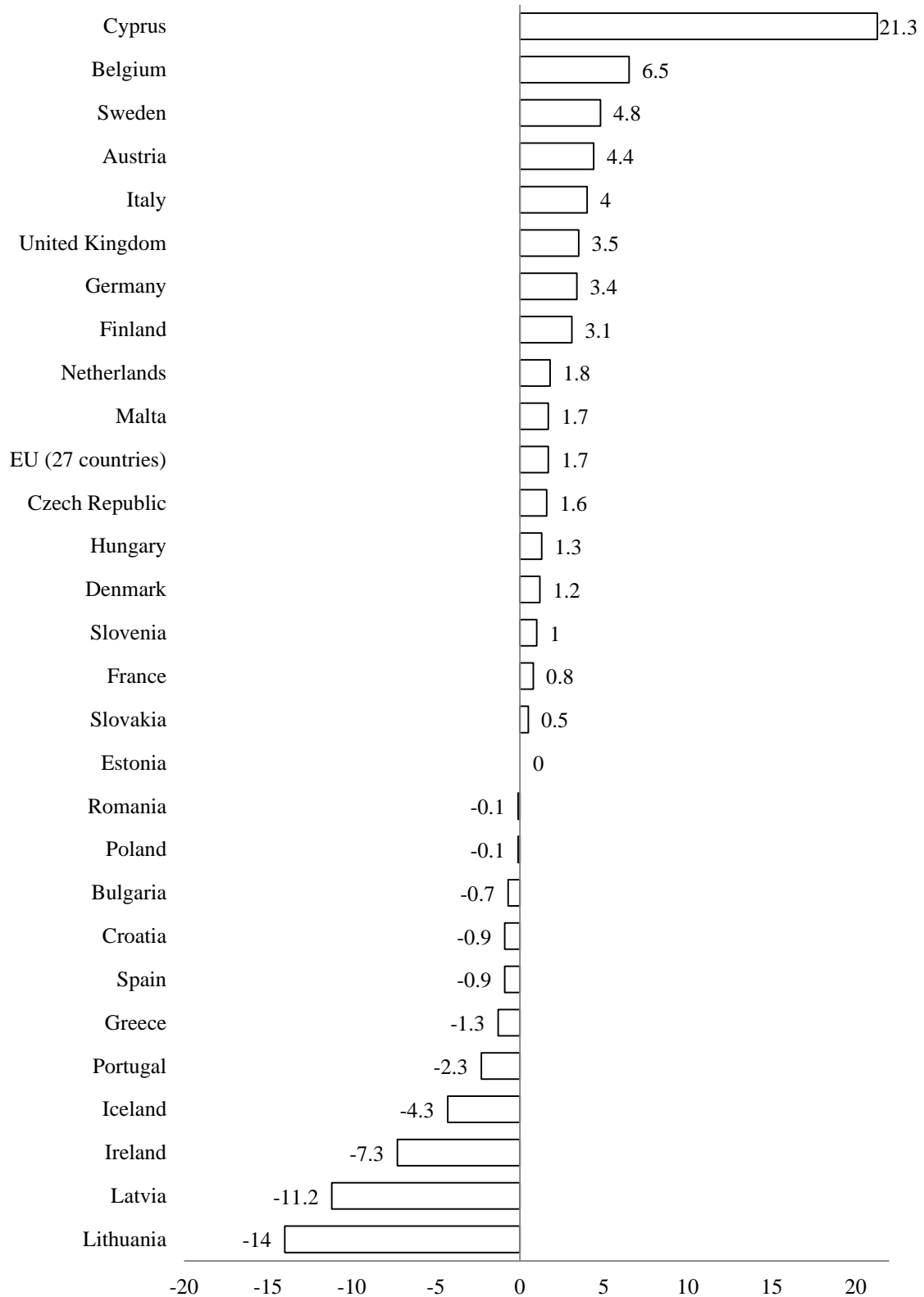
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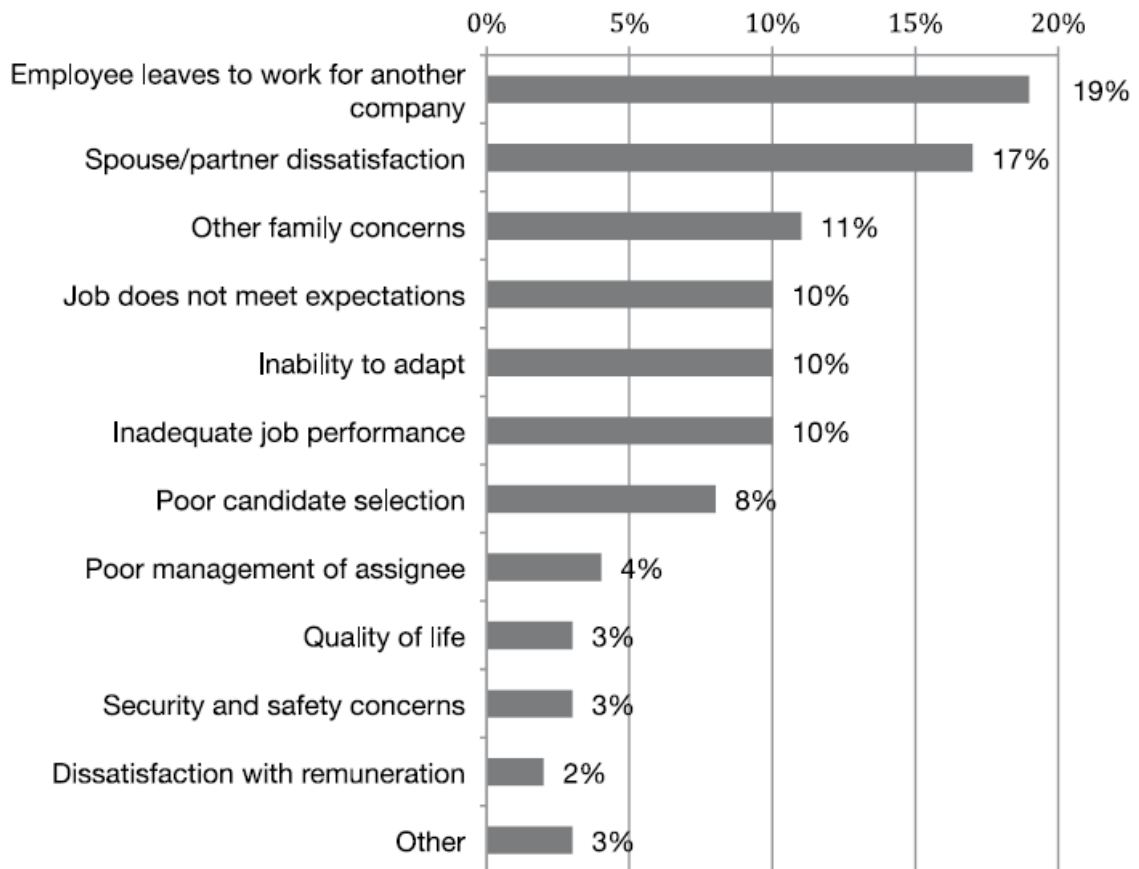
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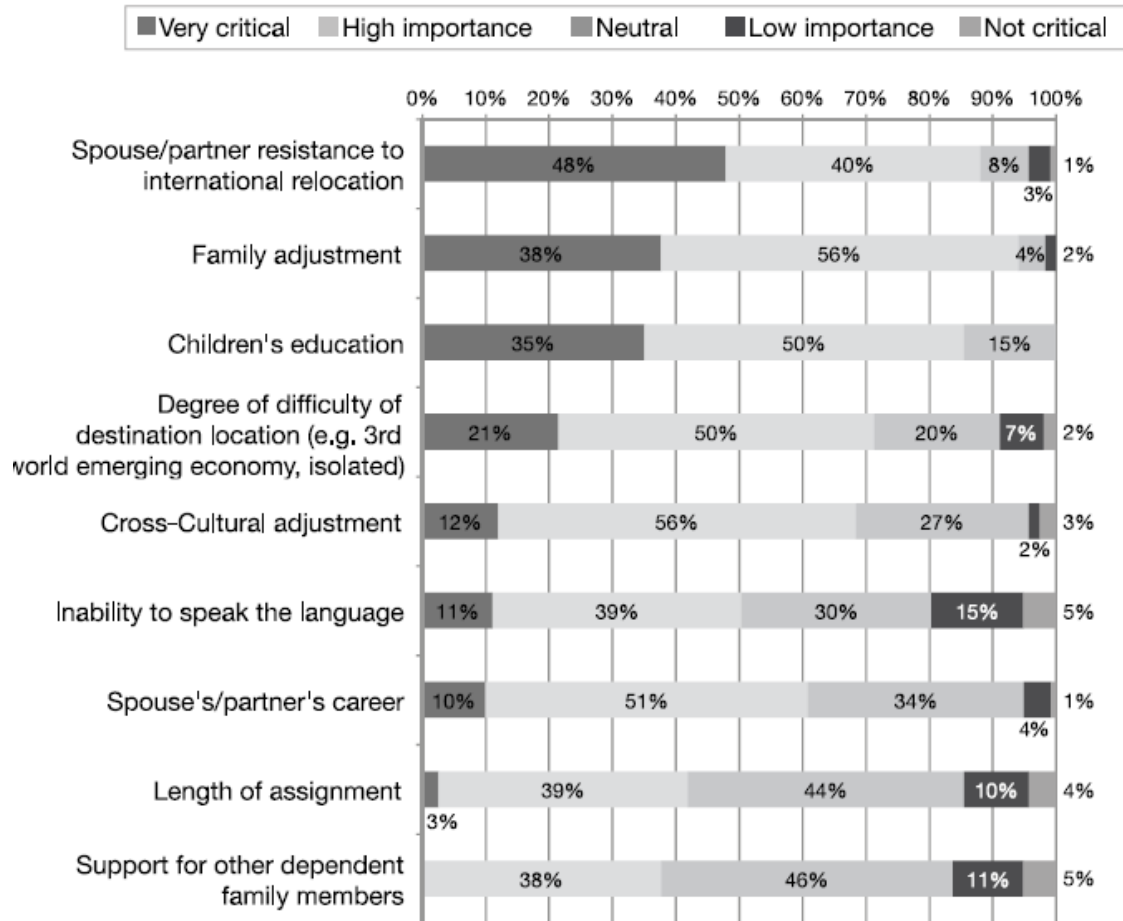
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**APPENDIX 1. The rate of net migration plus adjustment per 1000 inhabitants**  
(Eurostat 2013)

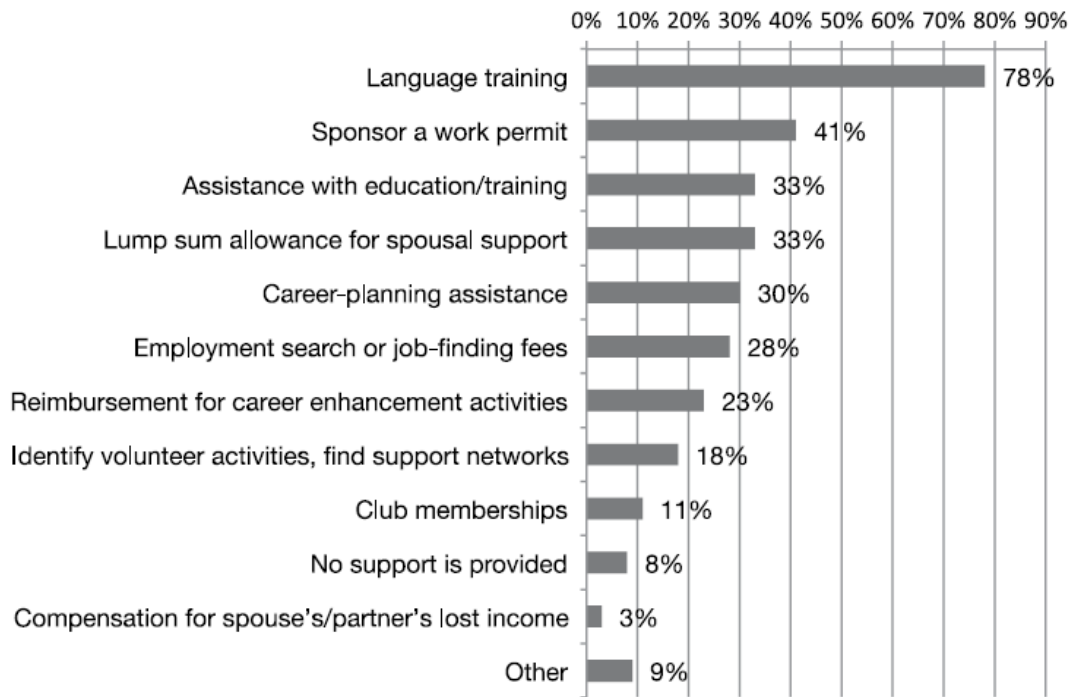


**APPENDIX 2. Causes of assignment failures (BGRS 2012)**

### APPENDIX 3. Critical family related challenges (BGRS 2012)



#### APPENDIX 4. Spouse/partner assistance (BGRS 2012)



Respondents provided multiple answers



**APPENDIX 5. Invitation Letter**

**Dear Sir or Madam,**

Thank you for your willingness to participate in this research. With the purpose of clarifying your considerations in terms of participation and your role in the study, I would like to answer some important questions beforehand.

**Purpose of this research:** Investigating and better understanding the issues and factors of self-initiated expatriate spouse's cross-cultural adjustment on international assignments.

**Benefits of the research:** To help improve self-initiated dual-career expatriate's spouse's adjustment during overseas assignments by identifying adjustment issues and influencing factors. Currently, there is very limited research on this topic.

**Your role:** You will voluntarily take part in a face-to-face personal interview, where your own truthful and honest opinion is welcomed. No preparation is needed before the interview. The interview is scheduled to last approximately one hour.

**Confidentiality:** The interviews will be recorded. The records will be accessible to me and my professor only. Thus, your anonymity is fully guaranteed. During the interview you are also welcome to introduce yourself with a pseudonym. Again, the information provided during the interview will be anonymous.

I look forward to meeting you and hope this information encourages your participation in the research, which aims to deliver tangible benefits for you and for the sake of science.

Best regards,

Justas Lukoševičius

University of Vaasa, Finland

MA in International Business, EPAS accredited



University of Vaasa

## APPENDIX 6. Interview Guidelines and Questionnaire

### ENGLISH

#### Introduction (approx. 3 min.)

- Thanking for participation.
- Shortly introducing myself in order to establish trust and relationship.
- Providing instructions:
  - *The purpose of this interview is to understand the cross-cultural adjustment process that you and your spouse experienced when living overseas.*
  - *The interview will take approximately 30-60 minutes.*
  - *The participant's right not to answer any question if it's wished.*
  - *The previously agreed right to confidentiality and anonymity.*
  - *The request to record.*
- Agreement to start the interview.

#### Participant background

Age	Education	Marital status	Number of children	Time in HC	Occupation before IA	Occupation during IA
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#### Motivation

1. Could you tell about your international experience in general (including work, studying, accompaniment of family, etc.) before the IA?
2. Could you tell about the reasons why did you go to IA with your spouse?
3. What motivated you the most to go overseas? What drives you the most? What did you enjoyed the most being overseas?

#### Specific issues of spousal adjustment

4. How different (in terms of culture, general living conditions, climate, etc.) was the host country from your home country? Could you describe that environment where you had to live? Did you find it challenging?

5. Could you think for a moment and tell, what has been the most difficult for you to deal with during your IA?
6. Could you try to remember any stressful situation that was difficult to handle? Maybe it was some insignificant but really annoying situation? Or maybe something big and overwhelming?
7. How long (months or years) it took for you to adjust?

**Inhibiting factors**

8. What were the key factor(s) that inhibited your adjustment during your IA?
9. What pressures did you feel? Was there something that you were thinking you will never get through?
10. How did you handle these pressures?

**Facilitating factors**

11. What were the key factor(s) that facilitated your adjustment during your IA?
12. What do you think, what helped you the most to adjust to the foreign culture?
13. How do you feel, what were the sources that you have received most of the support from?

**Organization support**

14. Have you received any support from your spouse's company? If yes, what kind of support? How helpful was it?
15. Did you have any training from the spouse's company? How helpful was it?
16. Was there any person from your spouse's company whom you could call if you needed assistance such as doctor referrals, recreation activities, or everyday advice?
17. What is your opinion about the companies, which support not only expatriates but also their spouses? How useful is it?

18. Is there anything else that your spouse's company could have done to facilitate your adjustment? What would have been helpful?

**Other support**

19. Did you have any other contacts that you can call if you need assistance?

20. Have you prepared yourself for going abroad on your own? How important was your own preparation?

**Concluding**

21. Is there something else that you would like to share? Maybe you would have some advice for other self-initiated expatriates spouses that are facing adjustment challenges on their IA?

**Thanking for the interview.**