



Cross-cultural adjustment of expatriates: The role of emotional intelligence and gender



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ABSTRACT

The study examines the role of emotional intelligence (EI) in cross-cultural adjustment (CCA) of expatriates on international assignments. Based on a sample of 269 French expatriates operating in 133 countries, our analysis finds a significant and positive relationship between EI and expatriates' general living, interactional and work-related CCA. Additionally, it shows that cultural similarity only facilitates general living adjustment and not interactional or work adjustments. Finally, our analysis reveals an interesting interaction effect between gender and the ability to appraise and express emotions: the influence of the latter on all three dimensions of CCA tends to be slightly stronger for male than female expatriates. The study offers important practical implications for organizations concerning the identification and development of successful expatriates.

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1. Introduction

Expatriation, defined as a voluntary, temporary migration of a person abroad for a specific purpose with an ultimate return to his/her home country (cf. Cohen, 1977), is a central part of international business activities undertaken by multinational companies globally. One of the largest surveys of expatriates and globally mobile employees, conducted by Mercer, showed that, in 2008–9, 243 multinational companies worldwide employed over 94,000 expatriates (compared to around 50,000 expatriates in 2005–6).¹ In many ways the success of companies' international business activities today depends on expatriates, for example, how well they are able to function in the new environment to which they are transferred, cooperate with locals, apply their competences and knowledge, learn new things, and cope with uncertainty. Whether expatriates can succeed in these tasks depends to a large extent on their cross-cultural adjustment (CCA) to the host environment/country, that is, the extent to which an expatriate feels psychologically comfortable in relation to a variety of aspects of a new environment (e.g. Caligiuri, 1997; Mezas & Scandura, 2005; Tung, 1998).

Research has provided ample evidence suggesting that expatriate adjustment is a challenging and difficult process (e.g. Aycan, 1997; Caligiuri, 2000; Tung, 1998). Several seminal articles in the field have stressed the critical role of adjustment for successful expatriation and underlined the complex and multidimensional nature of the adjustment process, differentiating between general living, interactional, and work-related adjustment (e.g. Aycan, 1997; Bhaskar-Shrinivas, Harrison, Shaffer, & Luk, 2005; Black, Mendenhall, & Oddou, 1991; Hechanova, Beehr, & Christiansen, 2003). Research to date has been insightful in explicating the impact of different individual and contextual (i.e. work, organizational, or institutional) factors on CCA. The former included studies that examined the impacts of the Big Five personality traits (e.g. Caligiuri, 2000; Huang, Chi, & Lawler, 2005); locus of control (Black, 1990; Lii & Wong, 2008); socio-ability and flexibility (Black & Stephens, 1989); interpersonal and social skills (Hechanova, Beehr, & Christiansen, 2003); language skills (Kim & Slocum, 2008); and, recently, cultural intelligence (Rose, Ramadu, Uli, & Kumar, 2010; Wu & Ang, 2011) on CCA. The latter stream of research focused on: cross-cultural training (e.g. Caligiuri, Phillips, Lazarova, Tarique, & Bürgi, 2001; Okpara & Kabongo, 2011); psychological contract (Haslberger & Brewster, 2009); spousal/family support (Black & Stephens, 1989; Caligiuri, Hyland, Joshi, & Bross, 1998); organizational support (Caligiuri, Joshi, & Lazarova, 1999); mentoring (Mezas & Scandura, 2005); role novelty and role ambiguity (Shaffer, Harrison, & Gilley, 1999); cultural distance/cultural similarity (Black & Gregersen, 1991; Shaffer et al., 1999); international experience (Selmer, 2001, 2002); as well as several

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¹ www.globalhrnews.com/story.asp?sid=1149 (accessed on 20.6.13), "Companies increase number of expats," October 27, 2008.

other factors (see [Hechanova et al., 2003](#), for a more comprehensive meta-analysis of the literature).

With a few exceptions (e.g. [Gabel, Dolan, & Cerdin, 2005](#); [Lii & Wong, 2008](#); [Tan, Härtel, Panipucci, & Strybosch, 2005](#)) the role of emotions, and specifically of emotional intelligence (EI), for expatriates' CCA has received relatively little attention. EI is defined as an array of capabilities, competences, and skills that influence one's ability to cope with environmental demands (e.g. [Salovey & Mayer, 1990](#); [Schutte, Malouff, Hall, Haggerty, Cooper, Golden, & Dornheim, 1998](#)). The lack of research on this topic is surprising for two main reasons. First, it is recognized that often the success of the expatriation process depends on choosing a culturally attuned and emotionally sensitive person who can respond appropriately to the host environment of another country and different interpersonal work situations ([Alon & Higgins, 2005](#); [Huang et al., 2005](#)). Second, in other streams of research the level of EI was found to be critical for success in emotionally intensive areas of human activity, such as leadership (e.g. [Goleman, Boyatzis, & McKee, 2002](#); [Humphrey, Pollack, & Hawver, 2008](#)), work, and education (e.g. [Van Rooy & Viswesvaran, 2004](#)). Therefore, it could be expected that EI would be critical for expatriates, who get deeply involved in interactions with locals and need to cope with emotional stress and different acceptable forms and norms of emotional behavior. In this study we claim that there is a need to examine expatriates' EI levels to be able to better explain their CCA.

In order to further our understanding of the role of EI in expatriates' adjustment and add to the (so far) very limited empirical studies on the topic, we analyzed a sample of 269 overseas French expatriates in 133 countries working for Alliance Française, a government-recognized public interest foundation. This is an interesting sample of expatriates to test for adjustment because their primary tasks are to promote French culture and language globally and to establish a dialog between cultures by collaborating closely with foreign partners in other countries. To succeed in these tasks, one would expect these people to be very well adjusted to their host environments in order to invoke interest among locals and make them willing to collaborate with and learn from them. Moreover, the cultural homogeneity of the sample allows us alleviate potential differences across cultural groups in experiencing, registering and expressing emotions, noted in the literature examining the impact of national culture on individuals' emotional processes (e.g. [Elfenbein, 2007](#); [Elfenbein & Ambady, 2002](#); [Mesquita & Frijda, 1992](#)).

The analysis contributes to the literature on expatriates' CCA in three important ways. First, it indicates that EI has important explanatory power for expatriates' adjustment and success and, therefore, needs to be examined more thoroughly in the future. Second, the analysis sheds new light on the impact of cultural similarity, which has predominantly been presumed to facilitate all three dimensions of adjustment (e.g. [Bhaskar-Shrinivas et al., 2005](#); [Black et al., 1991](#)). Finally, it adds to our understanding of the role of gender in moderating the relationship between EI and CCA.

2. Theoretical framework and development of hypotheses

Research has shown convincingly that EI and emotions in general play a significant role in individuals' intellectual functioning ([Elfenbein, 2007](#); [Salovey & Mayer, 1990](#)). EI has been defined as an enduring personal trait, which underlines an individual's ability to adaptively identify, understand, manage, and harness the emotions of self and others and use these emotions to facilitate cognitive processing ([Salovey & Mayer, 1990](#); [Schutte et al., 1998](#); [Mayer, Caruso, & Salovey, 1999](#)). The term EI was originally coined by [Salovey and Mayer \(1990\)](#), who, based on their literature review, proposed dividing it conceptually into three categories of adaptive ability: appraisal and expression of emotions (self and

others); regulation of emotion (in self and others); and utilization of emotions in solving problems (i.e. flexible planning, creative thinking, redirected attention, and motivation). Later, [Schutte et al. \(1998, p. 169\)](#), in an attempt to develop a "brief, validated measures of emotional intelligence" that would measure EI as a homogeneous construct, derived and validated a 33-item measure of EI. The resulted measure fitted well with the three conceptual categories originally suggested by [Salovey and Mayer \(1990\)](#). Among the 33 items, 13 measured appraisal and expression, 10 measured regulation, and 10 measured utilization of emotions. We rely on this classification in deriving and testing our hypotheses.

Research on EI found it to be positively related to well being ([Austin, Saklofske, & Egan, 2005](#)), optimism ([Schutte et al., 1998](#)), positive mood, and high self-esteem ([Schutte, Malouff, Simunek, McKenley, & Hollander, 2002](#)), and negatively to depression ([Schutte et al., 1998](#)). In interpersonal relations, EI was found to result in higher social skills, self-monitoring in social situations, and in more cooperative responses to others ([Schutte, Malouff, Bobick, Coston, Greeson, Jedlicka, Phodes, & Wendorf, 2001](#)). EI has been widely tested and applied in organizational behavior research (e.g. [Joseph & Newman, 2010](#); [Boyle, Humphrey, Pollack, Hawver, & Story, 2011](#)) and was shown to be an important predictor of, for example, job performance and leadership ([Ashkanasy & Daus, 2002](#); [Humphrey et al., 2008](#)) as well as stress ([Jordan, Ashkanasy, & Hartel, 2002](#)).

Overall, higher-level EI seems to address exactly those areas that can be potentially difficult for an expatriate on assignment. Therefore, it is to be expected that EI can be important for expatriates' CCA, because it might help them to cope with uncertainty and the complexity of the surrounding environment. Although the literature on expatriates' CCA has hinted at the importance of EI in determining its effectiveness (e.g. [Caligiuri et al., 2001](#); [Caligiuri & Tung, 1999](#)), so far very little research has examined the impacts of EI on CCA in detail. In a rare study examining the impact of EI on expatriates' adjustment, [Gabel et al. \(2005\)](#) found that EI directly influences adjustment but not assignment success. More specifically, their findings suggest that, although EI is not a direct predictor of assignment success, some dimensions of EI play an important role in explaining CCA and, by extension, the success of internationally assigned managers. These inter- and intrapersonal abilities and adaptability are predictive indicators of general living, interactional and work adjustment. However, the study used a relatively small sample (two subsamples of 39 and 20 managers) and all expatriates were from different countries, making it difficult to control for the potential impacts of national culture on respondents' emotions.

Now we turn to deriving our hypotheses around the three categories of adaptive abilities of EI proposed by [Salovey and Mayer \(1990\)](#): (1) appraisal and expression of emotions (self and others); (2) regulation of emotions (in self and others); and (3) utilization of emotions in solving problems.

2.1. Appraisal and expression of emotions (self and others) and CCA

The first adaptive ability in [Salovey and Mayer's \(1990\)](#) model refers to appraisal and expression of emotions (self and others). The authors claim that the processes underlying EI are initiated when affect-laden information first enters an individual's perceptual system. At this stage EI facilitates the accurate appraisal of feelings, which then influences how emotions are expressed. Individuals' ability to appraise and express emotions facilitates quicker perception of their own emotions, and responses to them, and better expression of those emotions to others. This ability also helps their recognition of others' emotional reactions and their empathic responses to them, ensuring smooth interpersonal interactions. This is undoubtedly a crucial ability, and absolutely

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