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IRMA BANEVIČIENĖ

A MULTILEVEL STUDY ON THE ADJUSTMENT OF SELF-INITIATED EXPATRIATES: EXPLORING COUNTRY, ORGANIZATION, AND INDIVIDUAL-LEVEL FACTORS

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A MULTILEVEL STUDY ON THE ADJUSTMENT OF SELF-INITIATED EXPATRIATES:
EXPLORING COUNTRY, ORGANIZATION, AND INDIVIDUAL-LEVEL FACTORS

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KAUNO TECHNOLOGIJOS UNIVERSITETAS

IRMA BANEVIČIENĖ

DAUGIALYGIS SAVARANKIŠKAI IŠVYKSTANČIŲ EKSPATRIANTŲ ADAPTACIJOS TYRIMAS ANALIZUOJANT ŠALIES, ORGANIZACINIUS IR INDIVIDUALIUS VEIKSNIUS

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LIST OF ABBREVIATIONS AND DEFINITIONS

Abbreviations:

IE – international employee

SIE – self-initiated expatriate

AE – assigned expatriate

MNCs – multinational corporations

HRM - human resource management

HCNs – host country nationals

Definitions:

International employees (IE) are employees who engage in work across national borders (De Cieri & Lazarova, 2021).

Assigned expatriates (AEs) – a specific professional group of employees (usually connotes highly qualified specialists, engineers, managers, etc.) who are sent to a foreign country by their employer (McNulty & Brewster, 2017; Przytuła, 2015). To relocate and settle in the host country, AEs use their employer's resources, and their stay in a foreign country is limited by the terms they agreed with their employer (Andresen et al., 2014; McNulty & Brewster, 2017; Przytuła, 2015).

Self-initiated expatriates (SIEs) – individuals who relocate to a different country to find a job (Al Ariss & Syed, 2011; Przytuła, 2015). The SIEs have no organizational support and move to the host country to live and look for jobs on their own (Al Ariss, 2010; Al Ariss & Crowley-Henry, 2013; Hajro et al., 2019).

1. INTRODUCTION

Globalization and the aging populations in most developed countries have made international mobility increasingly attractive to working individuals seeking employment opportunities abroad (Makkonen, 2016). According to the most recent data from the Global Migration Data Analysis Centre (as of January 2025), the number of international migrants was estimated at approximately 304 million as of mid-2024 (Migration and Human Mobility, 2025). The global estimate for 2020 was approximately 281 million international migrants worldwide, accounting for 3.6% of the global population, which is 128 million more than in 1990 and over three times the estimated number in 1970 (Interactive World Migration Report 2024). These shifts highlight evolving migration trends and growing global interconnectedness.

As reported by the United Nations Department of Economic and Social Affairs (2022), global mobility remains characterized mainly by the movement of people from less-developed to more-developed countries. However, regional mobility patterns are evolving, influenced by shifts in immigration policies, labor market demands, and changing economic conditions. For example, the expansion of the European Union and the dismantling of labor mobility barriers among its member states have significantly facilitated intra-regional movement (Dorn & Zweimüller, 2021; Illing, 2023). By contrast, in ex-USSR states, political instability and recurring crises have continued to guide mobility decisions, pushing people to seek better living and working conditions in different regions (Anniste et al., 2012; Erdoğan, 2021; Kumpikaitė-Valiūnienė & Žičkutė, 2017). At the same time, technological advancements and better access to global information in developing regions are also influencing the motivations for mobility. More than ever, individuals seek to relocate to destinations that offer greater socioeconomic, political, or cultural opportunities (Boateng et al., 2021). In Africa, for instance, the movement of people across the border is more often than long-distance relocation due to the existing geographic distribution of ethnic groups across neighboring countries (Hammar & Tamas, 1997).

Global developments, labor market demands, and shifting mobility patterns affect international employees (IEs) and their adjustment to host countries. After relocating to the host country, these individuals must navigate a complex process of cultural, professional, and social adjustment. Many of them face multiple challenges, such as culture shock, language barriers, unfamiliar workplace culture and norms, and social isolation (Barner-Rasmussen et al., 2014; Black et al., 1991; Feitosa et al., 2014; Haslberger et al., 2014; Mezias & Scandura, 2005; Rajasekar & Renand, 2013).

The scientific attention on expatriate adjustment began after Black and colleagues published their findings in the 1990s (Black, 1990; Black et al., 1991) and remains their essential field of interest. Research highlights that the adjustment of international employees impacts their job performance, facilitates effective knowledge transfer, and contributes to the success of international assignments and organizational objectives. Much of the research has focused on assigned expatriates (AEs) – employees sent abroad by their employers. However, recent data suggest that 50-73% of global expatriates are self-initiated expatriates (SIEs), who relocate

independently (Aminullah et al., 2022). As Fee and Gray (2020) noted, global demand for SIEs is growing, necessitating an increasing trend in their cross-border mobility. These developments highlight the importance of shifting the research focus to SIEs as their adjustment experiences are likely to differ from those of AEs and remain insufficiently analyzed in the current mobility literature.

1.1. Research gap analysis

The literature on international employee adjustment has primarily focused on assigned expatriates – employees sent abroad by multinational corporations (MNCs) to manage their foreign operations for a limited time period. Their adjustment has received more scholarly attention than that of any other type of IE, for several key reasons. First, the most significant number of AEs are managers sent by MNCs to a subsidiary company abroad to manage the company's operations there, thus making their adjustment critical to the success of knowledge transfer and organizational performance (Ismail et al., 2019; Ji & Connerley, 2013; Lija et al., 2023). Second, high costs and risks for MNCs if the foreign assignment of AE fails. The company's costs to expatriate a manager are high, as it involves relocation, training, and support services (Utami et al., 2019). Therefore, failure to adjust leads to termination of the manager's expatriation, which has substantial financial implications, prompting research to prevent the risks (Li & Jackson, 2015; Utami et al., 2019). Third, the availability and access to research the adjustment of AEs is less challenging for researchers because AEs often have well-documented motivations and are aligned with the organizational goals; they most often fill specific, pre-determined roles in the subsidiary (Utami et al., 2019).

However, international mobility is no longer confined to MNCs (Guillén & García-Canal, 2013; Hendriks, 2020; Hutzschenreuter et al., 2011) as the majority of expatriates today are self-initiated, who relocate independently in search of career, lifestyle, or personal growth opportunities (Froese, 2012; Wechtler, 2018). Despite their growing numbers and significance, SIEs remain under-researched compared to AEs. They often lack organizational support structures, making their adjustment process more complex and self-reliant (Farcas & Gonçalves, 2017; Froese & Peltokorpi, 2020; Samarsky, 2023). Their motivations are diverse, and personal, professional, and cultural factors shape their adjustment experiences (Farcas & Gonçalves, 2017; Isakovic & Forseth Whitman, 2013; Selmer & Lauring, 2011b). Unlike AEs, SIEs often require open-ended stays in host countries, which call for a deeper focus on country-level factors, such as national policies and societal inclusion mechanisms. SIEs frequently work in smaller firms or informal sectors that do not provide formal expatriation support (Cheng & Lin, 2009; Das, 2011; Villegas-Mateos, 2023). Understanding the experiences of SIEs is crucial for developing inclusive human resource management (HRM) practices and policy interventions that support their successful integration within the organization where they work (Howe-Walsh & Schyns, 2010). They also face challenges in building social networks, which significantly impact their well-being and job performance (Kaur et al., 2024; Selmer et al., 2015) highlighting the role of individual-level adjustment factors.

Management and business scholars point to various areas that would benefit from more SIEs' research across multiple levels: i) country, ii) organization, and iii) individual.

At the country level, the national context between SIE and the host country, such as history, geography, or legal implications, plays an important role in SIE's adjustment; therefore, more research studying the effects different national contexts have on SIEs' adjustment or comparable analysis among them would help build more robust support systems for them (Samarsky, 2023). Also, there is a need for empirical investigation into the effect of expatriates' family dynamics on expatriate and other family members' adjustment, as it has a significant impact on the expatriate's overall adjustment in the host country (Arun Kumar & Santhosh Kumar, 2015; Kittler et al., 2006). Emerging research is pointing to expatriate bubbles as helping to cope with foreignness; an analysis on how they affect expatriate adjustment would be welcome (Papafilippou & Efthymiadou, 2022).

At the organizational level, the impact of social networks and support systems at work affects AEs and SIEs differently because of their distinct structure and composition. Therefore, it would be beneficial to analyze their impact on SIEs' adjustment separately from AEs (Agha-Alikhani, 2016). Moreover, the role that host country nationals (HCNs) play in SIEs' adjustment is multidimensional; more research is needed to differentiate types of HCN roles, such as friends, supervisors, coworkers, etc., and their respective impacts (Bader, 2017; Kaur et al., 2024; Singh et al., 2021).

Finally, at the individual level, psychological processes such as resilience or cognitive dissonance are everyday experiences during SIE adjustment. Still, more research is needed to understand the challenges these processes present and to identify the most effective support mechanisms for assisting SIEs (Gao et al., 2023; Maertz et al., 2009).

While existing research often addresses the adjustment of assigned expatriates, it overlooks the multi-level nature of adjustment factors affecting SIEs, spanning country, organizational, and individual contexts. Because of their increasing prevalence and unique characteristics, SIEs necessitate a focused, multilevel analysis to address critical gaps in the current literature on adjustment.

Thus, **the research problem** of this dissertation is: *What country-level, organization-level, and individual-level factors influence the adjustment of self-initiated expatriates?*

The object of this dissertation is *the adjustment of self-initiated expatriates*, with a focus on the country, organizational, and individual factors that influence their successful integration and professional performance in host countries.

The aim of this dissertation is to enhance the understanding of self-initiated expatriates' adjustment by identifying and analyzing country-level, organization-level, and individual-level factors that influence their adjustment through a multilevel analysis.

The study incorporates four scientific publications to provide the background and explore the adjustment of self-initiated expatriates across three levels - country, organization, and individual (see Figure 1), and **four objectives** guide it:

1. To conduct a systematic literature review to identify research gaps and highlight future research directions related to the adjustment of SIEs.
2. To advance the understanding of SIEs' adjustment by contributing to the Person–Environment Fit theory through the examination of country-level factors.
3. To advance the understanding of SIEs' adjustment by contributing to the Person–Organization Fit theory through the exploration of organization-level factors.
4. To advance the understanding of SIEs' adjustment by contributing to signaling and similarity–attraction theories through the investigation of individual-level factors.
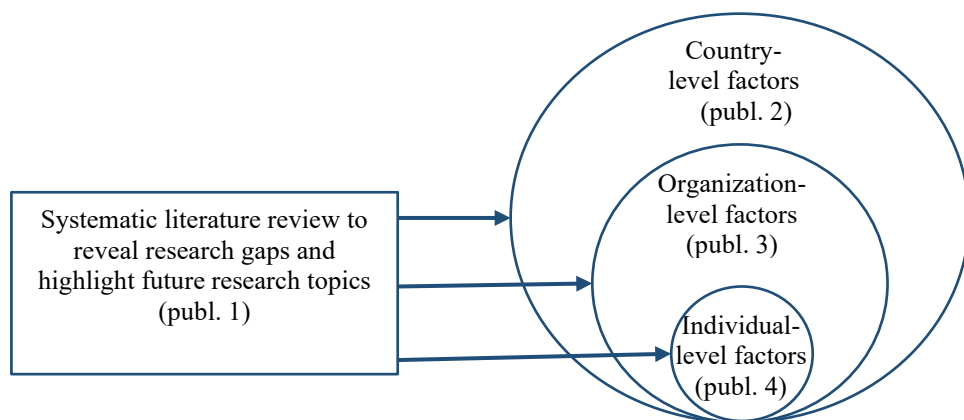
Fig. 1. The scope of the dissertation

1.2. Scientific novelty of the dissertation

The scientific novelty of the dissertation lies in its use of a multilevel analytical approach to examine the factors influencing the adjustment of self-initiated expatriates, a growing segment of international employees. While scientific literature has predominantly focused on assigned expatriates, this dissertation recognizes the increasing global mobility of SIEs and their unique adjustment challenges by systematically investigating under-researched adjustment factors at the country, organizational, and individual levels.

First, the dissertation presents a comprehensive hybrid literature review, which reveals that, even though Black et al.'s (1991) model of expatriate adjustment is still predominantly used by researchers in their studies, the adjustment research also incorporates other theoretical constructs such as acculturation, integration, adaptation, and sometimes assimilation (Baneviciene et al., 2024). The review also identifies that

the scope and applicability of research findings are not always clear in existing research and need to be synthesized, particularly in studies on temporal and contextual factors (Baneviciene et al., 2024). Moreover, the analysis revealed significant research gaps that necessitate greater emphasis in future studies. These include a stronger focus on diverse international employee (IE) cohorts, as most existing research has primarily examined assigned expatriates, as well as increased attention to a broader range of home and host countries, demographic variables, remote and anticipatory adjustment, and the multiple factors influencing adjustment at the country, organizational, and individual levels (Baneviciene et al., 2024).

Second, the dissertation offers original empirical insights through the application and extension of four theoretical frameworks, Person–Environment Fit, Person–Organization Fit, Signaling Theory, and Similarity–Attraction Theory, to examine SIE adjustment across different levels: (i) At the country level, it extends Person–Environment Fit theory (Caplan, 1983) by analyzing both work and non-work contexts in newly emerging expatriate-receiving Eastern European countries such as Lithuania and Estonia; (ii) At the organization level, it broadens the application of Person–Organization Fit theory (Kristof, 1996) by exploring the significance of cultural fit and preferred organizational culture types in shaping SIEs' adjustment experiences; (iii) At the individual level, it integrates Signaling Theory (Spence, 1973) with Similarity–Attraction Theory (Byrne, 1997) to reveal how supervisors' international experience influences their interpretation of SIEs' uncertainty signals and subsequently their managerial behaviors towards them.

Ultimately, by presenting a multilevel analytical approach that integrates diverse theoretical perspectives and provides practical insights for policymakers, organizational leaders, and human resource professionals, this dissertation establishes a valuable foundation for advancing inclusive HRM practices, strengthening expatriate support systems, and informing immigration and integration policies in emerging host countries.

1.3. Integration across publications

The objectives of the dissertation were directly linked to each of the scientific publications. Objective 1 aimed to identify research gaps and future research directions concerning the adjustment of self-initiated expatriates. This was achieved through a hybrid literature review, the findings of which were presented in the first publication. The review revealed that the adjustment of international employees is under-researched at three distinct levels: country, organization, and individual. Accordingly, objectives 2, 3, and 4 were formulated to explore adjustment-related factors at each of these levels. Each objective was addressed through an empirical study, resulting in three additional publications (see Figure 2).

1 Publ. (published in Humanities and Social Sciences Communications):

Obj.1. To conduct a systematic literature review to identify research gaps and highlight future research directions related to the adjustment of SIEs.

Main gaps in research:

- **Country-level factors:**
1) Countries that have over 20% foreign-born employees in their workforces (such as Switzerland, Australia, and New Zealand),
2) *Countries traditionally known as expatriate sending but not receiving (East Europe),*
3) Countries with low international mobility (Africa)

- **Organization-level factors:**
1) Anticipatory adjustment of migrants and SIE;
2) COVID-19 organizational changes;
3) *Work environment such as organizational culture type,* working conditions, etc.

- **Individual-level factors:**
1) Demographics of migrants;
2) *Supervisor* and coworkers;
3) Family/spouse adj. of SIE and migrants;
4) Effect on host country residents.

FOCUS: Multilevel approach to country, organization, and individual level factors

Country →

2 Publ. (Published in International Journal of Intercultural Relations):
Obj.2. To advance the understanding of SIEs' adjustment by contributing to the Person–Environment Fit theory through the examination of country-level factors.
- Sample: assigned and self-initiated expatriates
- Research methods: qualitative
- Countries: Estonia and Lithuania
- Country level factor - *countries traditionally known as expatriate sending but not receiving (Eastern Europe)*

Organiza-tion →

3 Publ. (published in Frontiers in Psychology):
Obj.3. To advance the understanding of SIEs' adjustment by contributing to the Person–Organization Fit theory through the exploration of organization-level factors.
- Sample: self-initiated expatriates (SIEs)
- Research methods: quantitative
- Countries: Various
- Organization level factor: *organizational culture type*

Individual →

4 Publ. (published in PLOS One):
Obj4. To advance the understanding of SIEs' adjustment by contributing to signaling and similarity–attraction theories through the investigation of individual-level factors.
- Sample: self-initiated expatriates (SIEs)
- Research methods: qualitative
- Country: the USA
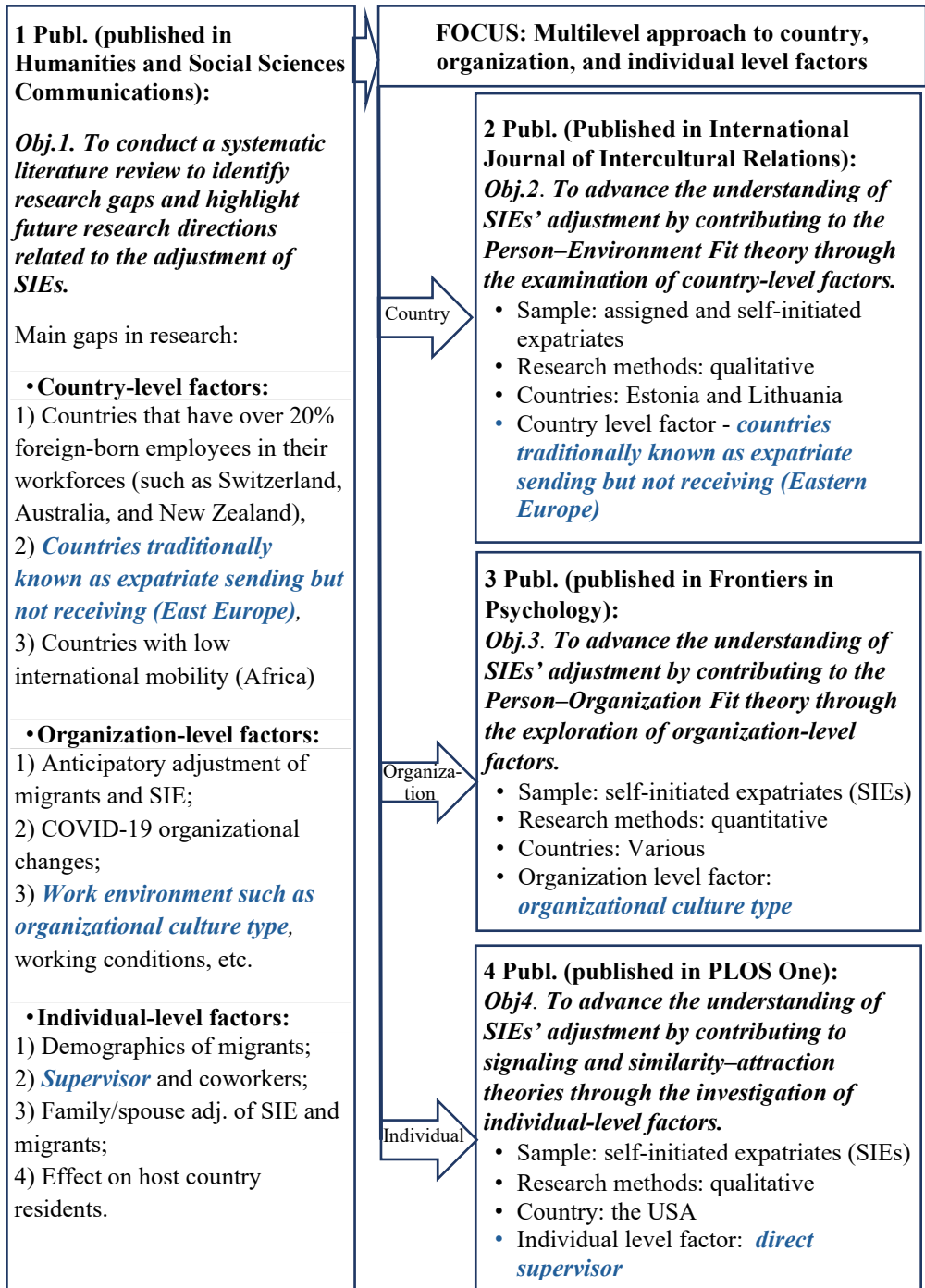- Individual level factor: *direct supervisor*

Fig. 2. The structure of the connection of the publications and their main characteristics

1.4. The author's contributions to the publications

Table 1 details the summary of the publications and I.Baneviciene's contributions. The dissertation author was the first and corresponding author of the first publication, actively participating in the creation of the research methodology and performing the search, coding, and initial analysis of the findings. As the corresponding author, I.Baneviciene was actively involved in the preparation, editing, and resubmission processes of the article.

The dissertation author contributed and was the corresponding author to the second publication. I.Baneviciene contributed by analyzing and grouping the results, as well as writing the assigned theoretical and methodological sections. As the corresponding author, I.Baneviciene was actively involved in the preparation, editing, and resubmission processes of the article.

The dissertation author was the third author of the third publication. She collaborated with co-authors to develop a survey questionnaire and assisted in collecting the data. I.Baneviciene contributed by writing the assigned theoretical and methodological sections and analyzing results. Later, she was actively involved in editing the article for resubmission for publication.

The dissertatin author was the first and corresponding author of the fourth publication, actively participating in the creation of the research methodology, organizing and conducting interviews, performing theoretical analysis, and coding and analyzing the results. As the corresponding author, I.Baneviciene was actively involved in the preparation, editing, and resubmission processes.

1.5. Permissions from publishers and co-authors

Publications 1, 3, and 4 have been published as open-access articles under the Creative Commons Attribution License, which permits the use, distribution, or reproduction in other forums, provided the original author(s) and the copyright owner(s) are credited and that the original publication in this journal is cited, under accepted academic practice. Permission from the publisher of Publication 2 has been acquired via email.

Permissions from the first and corresponding authors have been acquired via email.

Table 1. Summary of the publications and the author's contributions

Dissertation objectives	Title of the publication	The main research question of the publication	Journal (quartile)	Author contributions to the publication
1. To conduct a systematic literature review to identify research gaps and highlight future research directions related to the adjustment of SIEs.	Assessing the s quo of international employees' adjustment research, 1990–2022: a review and future research agenda	**RQ1.** What ar trends, patterns, and gaps in research topics about the adjustment of international employees within the management and business domain from 1990 to 2	Humanitie Social Sciences Communication (Q1)	• **first and corresponding author** • actively participated in the creation of research methodology • performed the search, coding, and analysis of related articles • actively involved in article writing, editing, and the submission process
2. To deepen the understanding of SIEs' adjustment by examining influencing factors at the country level	Factors influen expatriates' adjustment in Estonia and Lithuania	**RQ2.** What fai influence expatriate adjustment in countries usually known as expatriate-sending countries?	Internatio Journal of Intercultural Relations (Q1)	• **corresponding author** • analyzed and grouped results for the article • wrote the assigned theoretical and methodological sections • actively involved in article preparation for submission, editing, and the submission process
3. To enhance the understanding of SIEs' adjustment by exploring organizational-level factors.	The Impact The Different Types of Organizational Cultures Have on the Adjustment of Self-Initiated Expati	**RQ3.** What in does organizational culture type have on SIE's adjustment?	Frontiers i Psychology (Q1)	• **third author** • collaborated with co-authors to create the survey questions and assisted in collecting the data • wrote the assigned theoretical and methodological sections

Dissertation objectives	Title of the publication	The main research question of the publication	Journal (quartile)	Author contributions to the publication
				• actively involved in article editing during the submission process
4. To advance the understanding of SIEs' adjustment by investigating individual-level factors	International experience of a direct supervisor – does it matter for self-initiated expatriates' adjustment?	**RQ4.** How does international experience of a direct supervisor or manager intersect with and influence the adjustment of SIEs?	PLOS One	• **first and corresponding author** • actively participated in the creation of research methodology and interview questions • performed interviews • analyzed results • actively involved in article writing, editing, and the submission process

2. THEORETICAL BACKGROUND

2.1. International employees and self-initiated expatriates

International employees are employees who engage in work across national borders (De Cieri & Lazarova, 2021). There are many categories of international employees defined in scientific research. Nonetheless, the authors have often tailored these definitions to suit their research sample, even though they might overlap (Andresen et al., 2018). Along with less commonly researched types of IEs, such as international business travelers, sojourners, short-term assignees, international commuters, and rotational assignees, the most frequently discussed groups in global mobility literature are assigned expatriates, self-initiated expatriates, migrant workers, immigrants, and skilled migrants (Andresen et al., 2014; Cerdin & Selmer, 2014; McNulty & Brewster, 2017; McNulty & Selmer, 2017; Przytuła, 2015) (Table 2).

Table 2. The most frequently used types of international employees

Types of IEs	Definition
Assigned expatriates (AE)	A specific professional group of employees (usually connotes highly qualified specialists, engineers, managers, etc.) who are sent to a foreign country by their employer (McNulty & Brewster, 2017; Przytuła, 2015). To relocate and settle in the host country, AEs use their employer's resources, and their stay in a foreign country is limited by the terms they agreed with their employer (Andresen et al., 2014; McNulty & Brewster, 2017; Przytuła, 2015).
Self-initiated expatriates (SIE)	Individuals who relocate to a different country to find a job (Al Ariss & Syed, 2011; Przytuła, 2015). The SIEs have no organizational support and move to the host country to live and look for jobs on their own (Al Ariss, 2010; Al Ariss & Crowley-Henry, 2013; Hajro et al., 2019).
Migrant workers	Unskilled individuals having less educated backgrounds and originating from less developed countries (Al Ariss & Crowley-Henry, 2013; Castles et al., 2005).
Immigrants	A person who comes to live permanently in a foreign country (Doherty et al., 2013; Przytuła, 2015).
Skilled migrants	Skilled migrants are defined as individuals who have post-secondary or higher degrees of education and move to live and work in different countries with the goal of staying there permanently (Cerdin et al., 2014; Crowley-Henry & Al Ariss, 2018).

Self-initiated expatriates constitute a significant segment of global mobility, with a diverse range of motivations for relocating to, seeking employment, and settling in a foreign country (Andresen et al., 2014; Selmer et al., 2015). The key SIEs' motives to expatriate are: i) to gain international experience by broadening their horizons and exposing themselves to different cultures and work environments, which can enhance their professional and personal development (Farcas & Gonçalves, 2017;

Selmer & Lauring, 2011a); ii) job conditions that are more appealing than those available in the home country, such as career opportunities, better wages, and professional growth (Farcas & Gonçalves, 2017; Froese, 2012); iii) poor labor market at home, such as high unemployment, unchallenging job roles, and lack of job benefits (Baruch & Forstenlechner, 2017; Froese, 2012); iv) considerations to the family, such as being closer to family members and a desire to provide better for their families (Farcas & Gonçalves, 2017; Froese, 2012; Hussain & Zhang, 2021); v) desire to change life or identity, such as to escape the current situation, reconstruct their identities, or seek personal development (Myers et al., 2017; Selmer & Lauring, 2011a; Wechtler, 2018); vi) curiosity and pursuit of new experiences (Selmer & Lauring, 2011a).

2.2. Expatriate adjustment

Because SIEs are not associated with an employer at the time of their relocation, they are free to move to the country of their choice; however, at the same time, it is more difficult for them to find employment and adjust in the new country because they lack employer support. The main challenges that SIEs face while adjusting to a foreign country are: i) cultural challenges, such as cultural norms, language barriers, and communication styles creating discomfort and misunderstandings, impeding effective communication and integration (Arseneault, 2020; Zakaria & Yusuf, 2023); ii) professional challenges, such as new work practices, different recruitment processes, or facing underemployment, resulting in difficulties finding jobs matching their qualifications (Harry et al., 2019; Samarsky, 2023; Zakaria & Yusuf, 2023); iii) psychological challenges, such as motivation, stress, and resilience (Gao et al., 2023; Hussain & Zhang, 2021); iv) social challenges, such as a lack of social networks, homesickness, and loneliness, affecting their mental health and overall well-being (Claus et al., 2015; Zakaria & Yusuf, 2023).

To understand expatriate adjustment, scientists proposed and tested several theories, models, and frameworks. U-curve adjustment theory was proposed by Lysgaard in 1955 and has four distinct phases: honeymoon, culture shock, recovery, and adjustment (Lysgaard, 1955). Gullahorn and Gullahorn (1963) proposed the W-curve adjustment model, emphasizing the required adjustment that occurs after expatriates return home from their assignment. The J-curve was proposed by Black and Mendenhall, stressing the later improvement after the adjustment stage (Black & Mendenhall, 1991). These theories were criticized for their simplicity and the lack of empirical evidence supporting them. However, they sparked a discussion among scholars about the need for a more complex theoretical framework for expatriate adjustment. Black et al. (1991) proposed a comprehensive model of international adjustment, identifying three dimensions of expatriate adjustment: general adjustment, interaction adjustment, and work adjustment. This model has sparked numerous studies in the business and management fields since its inception and remains one of the most cited scientific works in the expatriate adjustment literature.

Dawis and Lofquist's (1984) person–environment fit (P–E fit) theory suggests that expatriate adjustment is likely when there is alignment between the individual

and the host environment, that is, when expatriates' abilities match the demands of the cultural context, and the context satisfies their personal needs. When this fit is achieved, the theory predicts more favorable adjustment outcomes (Dawis & Lofquist, 1984). The P-E fit theory has found wide application in management studies, extending to person-vacation, person-job, person-organization, person-group, and person-supervisor fit (Kristof-Brown et al., 2005). Haslberger and colleagues (2014) grounded their analysis in P-E fit literature and introduced the expatriate adjustment 3-D model, adding the dynamics of adjustment along with outcomes of adjustment abroad and repatriation adjustment (Haslberger et al., 2014).

Drawing on expatriate adjustment theories, researchers have examined factors influencing IEs' adjustment, such as self-efficacy (Dang & Chou, 2020; Harrison et al., 1996; Osman-Gani & Rockstuhl, 2009), locus of control (Chang et al., 2023; Lii & Wong, 2008; Young, 2001), job performance (Bhatti, 2012; Bhatti et al., 2013; Claus et al., 2015), social capital (Claus et al., 2015; He et al., 2019; Lee & Kartika, 2014), role discretion (Selmer & Fenner, 2009; Tsai et al., 2019), role conflict (Hechanova et al., 2003; Kittler et al., 2011; Okamoto & Teo, 2011), cultural intelligence (Akhal & Liu, 2019; Lin et al., 2012; Malek & Budhwar, 2013), emotional intelligence (Koveshnikov et al., 2014; Lin et al., 2012), international experience (Akkan et al., 2022; Selmer, 2002; Takeuchi & Chen, 2013), and social support (Bader, 2017; Canhilal et al., 2022; Lee et al., 2013). However, the literature indicates that further research is necessary on the factors affecting SIEs' adjustment at the country, organisational, and individual levels.

2.3. Country-level adjustment factors

Exposed to unfamiliar environments, people tend to compare themselves and their normal environment with the new environment (Hemmasi & Downes, 2013). The first comparison happens at a country level when SIEs move to a foreign country and need to adjust to many new societal factors that, in their home environment, they would not put much emphasis on as they are used to them, such as laws, societal norms, local and national governance, shopping patterns, infrastructure, language, behavior differences, etc.

Researchers highlighted country-related factors affecting international employees' adjustment, such as: healthcare and security (Leisyte & Rose, 2016), immigration and integration policies (Hajro et al., 2019; Papadopoulos, 2012), practical information on local housing, transportation, education, and grocery stores (Copeland & Griggs, 1985; Torbiörn, 1982; Weeks et al., 2010), visas, work permits, and language requirements (de Sivatte et al., 2019; Luksyte et al., 2014), relationships with locals (Waxin & Panaccio, 2005). These factors can affect SIEs' adjustment differently, depending on the country and the environment in which they find themselves. For example, in Nigeria, the greater the geographical distance between home and host country, the more significant the psychological adjustment of expatriates (Akhimien & Adekunle, 2021). Felix et al. (2019) argued that cultural distance is less important to adjustment than the level of development of the country

from which expatriates come; for example, Latin America is culturally closer to Brazil, but expatriates from developed countries, geographically farther from Brazil, adjust more easily to living in Brazil based on their better general adaptability.

Moreover, researchers analyzed how changes such as an aging population, economic instability, internal warfare, or new economic treaties between countries affect SIEs' adjustment in affected countries (Hatton, 2016; Mayda, 2005; Schotte & Winkler, 2014; Wilkes et al., 2008).

2.4. Organization-level adjustment factors

The second level of adjustment occurs within the organisational context. Globally, 40–50% of expatriates struggle to adjust at this level, leading to substantial organisational losses (Perera et al., 2017). As such, the successful adjustment of self-initiated expatriates (SIEs) plays a key role in enhancing organisational performance and competitive advantage (Froese & Peltokorpi, 2011; Jonasson et al., 2017; Sousa et al., 2017).

Several studies have examined organisational factors affecting expatriate adjustment. Florkowski and Fogel (1999) found that the host company's ethnocentrism hinders adjustment, while other researchers have shown that adapted socialisation policies and practices can support more positive outcomes (Fu et al., 2017; Liu & Lee, 2008; Stroh et al., 1994). Some studies portray organisations as potentially hostile environments for expatriates (Bonache et al., 2016; Yu & Ren, 2021), while others explore the role of organisational diversity and inclusion in supporting adjustment (Davies et al., 2019; Ertorer et al., 2020).

Further research has also addressed relational and perceptual aspects within organisations. For instance, studies have examined how employer trust and shared organisational vision influence the adjustment of SIEs and migrant workers (Dang & Chou, 2020; Jannesari & Sullivan, 2021), and how perceived organisational support shapes adjustment experiences (Kawai & Strange, 2014; Sokro et al., 2021; Stoermer et al., 2018; Takeuchi et al., 2009; Wu et al., 2023).

Despite this progress, a notable gap remains in understanding the role of organisational culture in SIE adjustment. While the adjustment of assigned expatriates has been linked to the cultural characteristics of both home and host organisations (Black et al., 1991; Pinto et al., 2011, 2012), much less is known about how SIEs, that are often locally hired and may lack prior exposure to the host organisation's culture, navigate these cultural dynamics.

2.5. Individual-level adjustment factors

The third comparison to an unfamiliar environment happens at the individual level. Because of their diverse cultural backgrounds, experiences, and understandings of organizational processes, SIEs working in an organization also influence the working relationship within the organization (Howe-Walsh & Schyns, 2010; Perlstein & Ciuk, 2019). Consequently, the organization faces new challenges in managing multinational teams of employees.

Multiple studies have investigated the personal characteristics of international employees and their impact on adjustment. These studies analyzed resilience (Davies et al., 2019), the ability to adjust to and master a new culture (Friedman et al., 2009), personality traits such as extroversion and openness to experience (Harari et al., 2018; Huang et al., 2005), and identity conflict (Ishii, 2012; Yu & Ren, 2021). Several studies focused on work role characteristics such as role clarity, discretion, locus of control, or role innovation, and their impact on international employees' adjustment (Fenner & Selmer, 2008; Lii & Wong, 2008; Shay & Tracey, 2009; Tang et al., 2017). Moreover, a few studies analyzed whether social capital accumulation affects the adjustment of assigned expatriates (He et al., 2019; Kuki et al., 2021). Adjustment strategies that expatriates used during their adjustment process and their efficiency were analyzed in several studies (Malik & Manroop, 2017; Valenzuela & Rogers, 2021; von Borell de Araujo et al., 2014).

In addition, researchers have examined how relationships with host-country nationals influence the adjustment of various types of international employees (Chiu et al., 2009; Guo et al., 2021; Mahajan & Toh, 2014; Pustovit, 2020; Templer, 2010), as well as the role of organisational leadership in facilitating expatriate adjustment (He et al., 2019; Lakshman et al., 2020; Lee et al., 2013; Marques et al., 2023). Studies have also explored the impact of direct supervisors' trust on migrant workers, alongside the moderating role of supportive supervision in enhancing the career adaptability of self-initiated expatriates (Dang et al., 2020; Jannesari & Sullivan, 2019).

SIEs are dependent on integration and socialization practices as well as host support. Unlike AEs, they cannot rely on headquarters support or prior knowledge. Likewise, SIEs differ from migrants who often work for themselves or other migrants; SIEs are forced to compete for their jobs with locals, having less social capital and fewer local networks to support them. Despite multiple studies analyzing SIEs' adjustment factors at the individual level, the uniqueness of SIEs' adjustment challenges warrants more targeted and specialised research.

2.6. Person-environment fit theory

The person–environment (P-E) fit theory emerged from efforts to understand how both individual characteristics and environmental conditions jointly shape experiences of stress and its consequences (Edwards et al., 1998). The central premise of this theory is that neither the person nor the environment alone determines well-being, behavior, or success. Rather, it is the degree of congruence, or "fit", between the two that is critical (Caplan, 1983; Dawis & Lofquist, 1984; Edwards et al., 1998). Stress arises when this fit is lacking, specifically when the resources provided by the environment are insufficient to meet an individual's needs, or when environmental demands exceed personal abilities (Edwards et al., 1998). Within this framework, strain is conceptualized as a deviation from normal functioning and serves as a key indicator of misfit (Caplan, 1983; Harrison, 1978).

There are three key distinctions that characterize P-E fit theory: the distinction between person and environment, the distinction between objective and subjective

representations of person and environment, and the distinction that differentiates between the two types of P-E fit (demands of the environment and abilities of the person, and needs of the person and supplies of the environment).

The distinction between person and environment is a core element of P-E fit theory. It is a prerequisite for conceptualizing P-E fit and provides the basis for examining reciprocal causation between the person and environment (Edwards et al., 1998). P-E fit theory assumes that people have an innate need to fit their environments and to seek out environments that match their own characteristics (van Vianen, 2018). Therefore, the P-E fit theory does not analyze person or environment separately, but rather considers their interaction. The interaction between a person and their environment can be both objective and subjective; thus, the second distinction of P-E fit theory is between objective and subjective representations of the person and environment (Edwards et al., 1998). An objective person is perceived as they actually are, with the attributes they possess, such as abilities and needs. In contrast, a subjective person is one who perceives themselves as having certain abilities or needs. Analogously, the objective environment exists whether a person relates to it or not, analyzes it or disregards it; the subjective environment, on the other hand, is how a person perceives it from their perspective. Depending on the interaction between the objective person or environment and the subjective person or environment, it generates a certain degree of coping or defense efforts that are used to resolve a P-E misfit (Edwards et al., 1998).

Coping is referred to as changing the objective person or environment to alleviate the impact of the P-E misfit. For example, if strain arises from a lack of knowledge, a person might seek additional training or read related literature to change their objective self by adapting to new requirements; therefore, reducing the strain. On one hand, if a strain arises from excessive work, a person might negotiate reducing the number of tasks they should be performing; therefore, changing the objective environment in order to alleviate the strain (French, 1974; Harrison, 1978). Defense arises from a person's subjective interpretation of the situation that causes a strain. For example, a person might underestimate or overestimate their abilities and readiness to perform certain tasks, causing strain by downplaying or ignoring excessive demands (Edwards et al., 1998). On the other hand, a person might react to the mistakenly perceived importance of work dimension by disengaging from, in his/her estimation, unattainable goals (Klinger, 1975; Schuler, 1985). The prolonged strain may lead to health issues and/or a distancing from social interactions, which can limit a person's options for resolving P-E misfit (Valentiner et al., 1994).

P-E fit theory has several implications for expatriates' adjustment and has been used in studies to analyze it in association with cross-cultural adjustment (Caligiuri et al., 2022; Campos et al., 2022; Nolan & Morley, 2014), psychological resilience (Gao et al., 2023), career anchors (Wechtler et al., 2017), personal value orientation (Tsegaye et al., 2019; Tsegaye et al., 2018), and cultural intelligence (Chen et al., 2024). Additionally, an important aspect of expatriate adjustment is that the individual usually has been aware of the reassignment abroad for some time before the actual event; therefore, planning for adjustments begins before the expatriate is fully

immersed in the new environment. However, depending on the sources of the information the expatriate gathers before the transition, the adaptation might be easier or more difficult (Haslberger et al., 2014; Mezias & Scandura, 2005). For instance, a self-initiated expatriate preparing for relocation to the United States might research the socio-economic context of Oregon, not realizing that, if they settle in California, the cultural norms and state regulations would differ significantly from those initially studied. Such discrepancies necessitate further adjustment even after careful preparation.

Self-initiated expatriate adjustment varies across different countries, with greater challenges in contexts where immigration is a relatively new phenomenon. In such settings – particularly in post-Soviet countries with limited histories of accommodating immigrants – expatriates often face a lack of structured guidance for adjustment. These underexplored environments offer valuable opportunities for extending P-E fit theory, thereby contributing to adjustment literature and generating practical implications for expatriates, policymakers, and host governments.

2.7. Person-organization fit theory

The person-organization (P-O) fit theory refers to alignment between the person and the organization, the fit between the person's values, beliefs, and personality, and the values, norms, and culture of an organization (Kristof, 1996; Kristof-Brown et al., 2005). The P-O fit theory is particularly relevant to expatriate adjustment, as a good P-O fit can impact their cross-cultural adjustment, leading to increased job satisfaction, embeddedness, commitment, and overall career success (Ferratt et al., 2005; Gutierrez et al., 2012; Nolan & Morley, 2014; Silverthorne, 2004; Wang, 2024).

Most researchers refer to the P-O fit model as the compatibility of individuals with organizations (Kristof, 1996). Two distinctions need to be specified: the distinction between supplementary and complementary fits (Muchinsky & Monahan, 1987) and the distinction between needs-supplies and demands-abilities (Caplan, 1987; J. R. Edwards, 1991). Supplementary fit is identified by how closely a person's characteristics align with those of the organization. On an individual's side, the characteristics most commonly studied are personality, values, goals, and attitudes; on the organizational side, they include culture and climate, values, goals, and norms (Kristof, 1996). Complementary fit refers to the situation when "the strengths of the individual offset the weaknesses or needs of the environment, and vice versa" (Muchinsky & Monahan, 1987). Each person and organization has its supplies and demands. If an organization offers sufficient financial, physical, psychological, and task-related development opportunities that meet the employee's needs, a need-supply fit is achieved (Kristof, 1996). On the other hand, the company requires employees' time, commitment, knowledge, abilities, and expertise; therefore, if a person can provide these resources sufficiently, the demand-ability fit is achieved (Kristof, 1996).

Overall, an assigned expatriate always has the option to leave the assignment and return to their home country. This is not the case for self-initiated expatriates, as the term of their expatriation is usually unknown, and the circumstances of their expatriation may limit the options for their return. Moreover, research in such areas

as motivations and career aspirations (Andresen et al., 2015; Biemann & Andresen, 2010; Farcas & Gonçalves, 2017; Selmer & Lauring, 2011a), organizational mobility and career management (Andresen et al., 2015; Biemann & Andresen, 2010), social network and support (Agha-Alikhani, 2016), cross-cultural adjustment (Fontinha & Brewster, 2020; Peltokorpi, 2008), and proactive career behaviour (Mello et al., 2024) highlights the differences between the assigned and self-initiated expatriates. That necessitates analyzing the P-O fit theory concerning self-initiated expatriates, separate from assigned expatriates.

Organizational culture has been described as "shared values and basic assumptions that explain why organizations do what they do and focus on what they focus on" (Schneider et al., 2017, p.486). For self-initiated expatriates, successful adjustment in an organization implies adjusting to its organizational culture as one aspect of their overall adjustment. Research extending the P-O fit theory to analyze how organizational culture influences the work and non-work adjustment of self-initiated expatriates, based on the type of organizational culture, contributes to the SIE management literature and highlights the importance of an individual's preference for a particular organizational culture.

2.8. Signaling theory

Spence (1973) conceptualized signaling theory by analyzing the signals sent by job applicants' education level to potential employers during the interview process and their alignment with the organization's mission and goals. The main elements of signaling theory are the signaler, the receiver, and the signal itself (Connelly et al., 2011). Some situations might include multiple signalers, receivers, or signals.

The signaler is a holder of information, some of which is positive and some of which is negative, that might be useful to outsiders; the signal is a form of verbal or non-verbal communication of that information, intentionally or involuntarily (Connelly et al., 2011). There are multiple attributes to the signals defined by management scholars. Signals can be "strong" or "weak" (Gulati & Higgins, 2003). They can be analyzed based on clarity (Warner et al., 2006), intensity (Gao et al., 2023), quality (Kao & Wu, 1994), reliability (Connelly et al., 2011), or credibility (Davila et al., 2003). However, regardless of the signal's attribute, visibility to and observability by the receiver are essential for this interaction to occur (Connelly et al., 2011). Management literature emphasizes that the receiver's ability to pay attention and interpret signals varies based on their prior experience with similar situations or preconceived notions about the signaler's intent (Branzei et al., 2004; Highhouse et al., 2007; Suazo et al., 2009; Turban & Greening, 1997).

Most of the literature relying on signaling theory has focused on organizations signaling their messages and values to outside stakeholders. Only a few studies apply it to analyze relationships between individuals within the organization (Corrington et al., 2024), including recruiters (Bangerter et al., 2012; Muduli & Trivedi, 2020; Vogel et al., 2023), managers (Broschak et al., 2020; Guest et al., 2021; Yasar et al., 2020), employees (Cañibano & Avgoustaki, 2022; Teng-Calleja et al., 2023; Venkataramani

et al., 2022), and corporate headquarters and subsidiaries (Mahnke et al., 2012; Taj, 2016).

Analyzing the signaling theory in association with the self-initiated expatriate as a signaler and their direct supervisor as a signal receiver, in combination with the similarity-attraction theory, is a novel approach that contributes to understanding challenges that SIEs face in the organization.

2.9. Similarity-attraction theory

Similarity-attraction theory posits that people tend to have more positive interactions and mutual liking with others who share similar characteristics, which can lead to stronger interpersonal connections (Abbasi et al., 2024; Byrne, 1997). Its application is used across various contexts, such as friendship formation (Duck & Craig, 1978; Laursen, 2017), romantic relationships (Ilmarinen et al., 2016; Zhou et al., 2015), intergroup relations (Danyluck & Page-Gould, 2018; Pollack et al., 2022), negotiations and conflict resolution (Sikorski & Albrecht, 2025; Wilson et al., 2016), hiring practices (Roebken, 2010; Yu et al., 2023), and employee behavior (Song & Kim, 2021; Van Hoye & Turban, 2015).

In work settings, the similarity-attraction effect can be observed in various aspects of organizational dynamics, from recruitment to team performance, and the effect is two-sided. On one hand, the theory suggests that potential employees are more likely to be drawn to organizations where they share similar personality traits (Van Hoye & Turban, 2015) and expectations about the future work environment and relationships (Yu, 2014). Also, psychological similarity, such as values and attitudes, leads to better team cohesion, which could improve job satisfaction and team performance (Lu & Fan, 2017; Mannix & Neale, 2005). On the other hand, it can create affinity or similarity bias, leading to favoritism and exclusion from decision-making (Abbasi et al., 2024).

Similarity-attraction effect is particularly relevant in the context of expatriates, who often face challenges in adjusting to new cultural environments. Research shows that perceived cultural similarity between the host and home countries, along with an individual's ability to fit into the host culture, influences expatriate job performance (Jun & Gentry, 2005). Similarity-attraction dynamics also affect expatriates' social support and adjustment. Host country nationals are more likely to offer support and inclusion to expatriates they perceive as similar to themselves in terms of values and categorization as in-group members; however, research shows that they are negatively affected by the social categorization of expatriates (Kaur et al., 2024; Pichler et al., 2012; Varma et al., 2016, 2021).

While cultural similarity can positively influence expatriate performance and adjustment, it also presents unique challenges that need to be managed through effective selection, training, and support systems. Understanding the nuanced dynamics of the similarity-attraction effect can help organizations better support their expatriates in their international teams. To analyze the better facilitation of the self-initiated expatriates' adjustment within the organization, a novel approach was

employed to highlight the international experience of the direct supervisor, combining signaling and similarity-attraction theories.

3. SUMMARIES AND MAJOR FINDINGS OF EACH RESEARCH PUBLICATION

3.1. Publication 1: Assessing the status quo of international employees' adjustment research, 1990-2022: a review and future research agenda

Baneviciene, I., Andresen, M., & Kumpikaite-Valiuniene, V. (2024). Assessing the status quo of international employees' adjustment research, 1990–2022: a review and future research agenda. *Humanities and Social Sciences Communications, 11*(1), 1-20. https://doi.org/10.1057/s41599-024-03098-y

In line with the first dissertation objective, to conduct a systematic literature review identifying research gaps and outlining future directions concerning the adjustment of self-initiated expatriates (SIEs), the following research question was formulated: ***What are the trends, patterns, and gaps in research topics on the adjustment of international employees within management and business domains from 1990 to 2022?***

To investigate the research question, a hybrid literature review was conducted, combining bibliometric analysis and content analysis of scientific article abstracts, aiming to: "(1) provide insights into the field's evolution over time; (2) identify research trends, priorities, and critical areas; (3) pinpoint research gaps for future exploration" (Baneviciene et al., 2024, p.2). This publication is the outcome of the hybrid literature review.

The publication was a review article offering a comprehensive overview of adjustment research published in the Web of Science Core Collection database from 1990 to 2022. The methodology employed in this review was adapted from Petersen et al. (2008) and followed a systematic mapping approach. Based on this approach, the search in the Web of Science database yielded 444 articles in the Business and Management categories. All abstracts were imported into MaxQda software, read, and analyzed to determine if the articles relate to the adjustment of international employees. After analysis, 222 articles were identified as meeting the study's search criteria (i.e., addressing the adjustment of self-initiated expatriates) and were further analyzed. Following the framework proposed by Paul and Criado (2020), a hybrid approach combining bibliometric analysis with a structured literature review was employed. This approach enabled the identification of thematic trends and the delineation of research priorities. In doing so, the review revealed key research gaps and proposed directions for future inquiry.

The results were presented in two sections: general information and trends in research topics. In the general information group, based on the number of research

articles published during the analyzed years, the authors concluded that the field of adjustment research is not yet fully mature, and further research is recommended. Most of the research published included samples of assigned expatriates, leaving adjustment of self-initiated expatriates, migrants, skilled migrants, and other immigrants underresearched. Sixty-four percent of articles used quantitative research methods, 20% used qualitative methods, and only 6% used longitudinal research methods.

The trends in research topics were organized after reviewing the adjustment research works by Black et al. (1991), Caligiuri et al. (1998), Chen (2010), Haslberger et al. (2014), Lee et al. (2014), Lett & Smith (2009), and Ritchie et al. (2015). Based on the overview, the anticipatory and in-country antecedents of IEs' adjustment were grouped into the main groups: individual-, organisation-, and country-related antecedents. The most extensive section of the results was dedicated to the countries where the research was performed and the nationality of the participants. Asia, Europe, and North America were the world's most researched regions in terms of adjustment. China, the US, and Japan were named the leading countries in adjustment research. Research on adjustment in China and Japan has primarily involved assigned expatriates. Additionally, most adjustment research relates to IEs, but there is notably less research published on how locals adjust to incoming IEs. Numerous recommendations were presented for future research, particularly in countries where the research could benefit the theory and yield unique results. Additionally, recommendations were formulated regarding the selection of sample nationalities that would enhance scientific knowledge on IE's adjustment.

The study fulfilled the first dissertation objective by identifying research gaps and highlighting future research directions related to the adjustment of SIEs.

3.2. Publication 2: Factors influencing expatriates' adjustment in Estonia and Lithuania

Kumpikaitė-Valiūnienė, V., Leišytė, L., Rose, A. L., Duobienė, J., Duoba, K., Alas, R., & **Banevičienė, I.** (2024). Factors influencing expatriates' adjustment in Estonia and Lithuania. *International Journal of Intercultural Relations*, 100, 101967. https://doi.org/10.1016/j.ijintrel.2024.101967

Building on the second dissertation objective, to advance the understanding of SIEs' adjustment by contributing to the Person–Environment Fit model through the examination of country-level factors, and informed by the research gaps identified through the hybrid literature review, the following research question was formulated: ***What factors influence expatriate adjustment in countries usually known as expatriate-sending countries?***

The study aimed to identify contextual factors that influence expatriate adjustment in countries traditionally regarded as expatriate-sending countries. Estonia

and Lithuania were selected as case countries because of their shared historical trajectories. As both have only recently emerged as expatriate-receiving locations, immigration remains a relatively new phenomenon, and they are still adapting to the increasing inflow of immigrants.

The research methodology was based on person-environment fit theory (J. Edwards et al., 1998; Haslberger et al., 2014) highlighting environmental importance and the literature on expatriate adjustment (Black et al., 1991; Haslberger et al., 2014; Stoermer et al., 2018) focusing on the supply and demand of work and non-work-related factors (Kumpikaitė-Valiūnienė et al., 2024) .

The study followed a qualitative research design. The interviews were conducted with twenty expatriates who sought to share their experiences of adjusting to Estonia and Lithuania. The interview analysis revealed that both countries had similar environmental supply and demand factors. The adjustment factors to the non-work environment included insufficient general information on infrastructure, transportation, and schools, limited healthcare support, difficulties with international travel, and bureaucratic barriers. On the positive side, participants highlighted that both countries are safe to live in and the locals are friendly.

Further research into specific country-related factors influencing expatriates' in-country adjustment revealed that environmental supply and demand, as well as work- and non-work-related factors, in the Lithuanian and Estonian contexts were similar. Work-related adjustment factors mentioned by the interviewees included lower-than-average EU salaries, which may deter highly qualified expatriates from choosing to live in Lithuania and Estonia, as this is one of their expectations (Duarte et al., 2021). Also, the interviewees mentioned the lack of support structures and information provided by government institutions and organizations upon arrival. In contrast, the individual assistance of coworkers, especially helping with the language barrier, was highlighted as a positive factor. This contradicts the results of Hildisch et al.'s (2015) study, which found social exclusion as a factor in a workplace environment. Among the non-work-related adjustment factors mentioned by interviewees were the quality of information provided by government institutions, as well as perceptions of safety and the adequacy of infrastructure. These findings are consistent with those of Copeland and Griggs (1985) and Haslberger and Brewster (2008). In addition, the study supported the findings of Peltokorpi (2008) in highlighting the importance of social networks and social interactions, facilitating adjustment in Lithuania and Estonia. In contrast to the findings of Black et al. (1991), cultural novelty did not emerge as a prominent theme in the interviewees' accounts of their adjustment experiences.

The study satisfied the second dissertation objective by providing insights into SIEs' adjustment in the countries that were previously known as expatriate-sending countries.

3.3. Publication 3: The Impact That Different Types of Organizational Cultures Have on the Adjustment of Self-Initiated Expatriates

Building on the third dissertation objective, to advance the understanding of SIEs' adjustment by contributing to the Person–Organization Fit theory through the exploration of organization-level factors, and drawing on the research gaps identified through the hybrid literature review, the following research question was formulated: ***What impact does organizational culture type have on SIEs' adjustment?***

The study followed a quantitative research design. The theoretical framework was based on the organizational culture typology proposed by Cameron and Quinn (1999), which served as the basis for the independent variables. The dependent variables—work and non-work adjustment—were constructed based on Black et al.'s (1991) model of expatriate adjustment. Additionally, controlling individual-related variables, such as age, gender, education, stay duration, and citizenship status, was added. Controlling work-related variables, such as role clarity and freedom of action, were measured using the Black et al. (1991) questionnaire. Data were collected via an online survey administered through SurveyMonkey, targeting expatriates worldwide. The final sample comprised 125 fully completed responses, which were analysed using SPSS, version 27.

Correlation and multiple linear regression analyses revealed that work adjustment positively and significantly correlated with Clan and Adhocracy organizational cultures. Non-work adjustment was positively and significantly correlated with Clan organizational culture, as well as with controlling variables, including job factors and duration of stay. The findings suggest that a Clan organisational culture is the most conducive to successful adjustment among self-initiated expatriates. Contrary to previous research, the controlled variables did not show significant correlations with either work or non-work adjustment. However, the duration of stay was positively associated with non-work adjustment, though it had no apparent effect on work adjustment. In contrast, role clarity and autonomy at work were positively linked to both work and non-work adjustment.

The study satisfied the third dissertation objective by demonstrating that a Clan organisational culture is the most supportive of successful adjustment among self-initiated expatriates within the organisation.

3.4. Publication 4: International experience of a direct supervisor – does it matter for self-initiated expatriates' adjustment?

Baneviciene I, Pinto LH, Kumpikaite- Valiuniene V (2025) International experience of a direct supervisor–does it matter for self-initiated expatriates' adjustment?. PLoS One 20(6): e0326848. https://doi.org/10.1371/journal.pone.0326848

Drawing on the fourth dissertation objective, to advance the understanding of SIEs' adjustment by contributing to signaling and similarity–attraction theories through the investigation of individual-level factors, and informed by the research gaps identified through the hybrid literature review, the following research question was formulated: ***How does the international experience of a direct supervisor or manager intersect with and influence the adjustment of SIEs?***

The study followed a qualitative research methodology and adopted an interpretivist philosophical stance, aiming to understand the subjective experiences and socially constructed meanings of IEs (Baneviciene et al., 2025). Twenty semi-structured interviews were conducted with direct supervisors in the United States who are either SEIs or have extensive international experience and have at least one SIE in their command who is of a different nationality. MaxQda software was used to analyze and code the transcribed interviews.

The study drew on signalling (Spence, 1973) and similarity-attraction theories (Byrne, 1997), applying Black et al.'s (1991) comprehensive framework of expatriate adjustment to categorise direct supervisors' support actions into general, interaction, and work-related domains. The study examined how supervisors interpret and respond to uncertainty signals communicated by SIEs. The findings suggest that supervisors draw on their own international experience as a valuable resource in recognising and understanding the challenges faced by SIEs in the workplace. SIEs convey uncertainty signals, such as limited language proficiency or differing work ethics, either directly to their supervisors or indirectly through observed workplace interactions. Direct supervisors interpret these signals as indicators of trust issues or as reflections of their own prior international experiences. The most common supervisory responses include efforts to understand the SIEs better and to offer support when needed. Supervisors reported that their actions primarily influence SIEs' adjustment within the work environment, with limited impact on non-work-related adjustment..

The study fulfilled the fourth dissertation objective by highlighting that direct supervisors who are themselves SIEs or possess international experience tend to relate more effectively to SIEs than those without such experience.

4. DISCUSSION AND CONCLUSIONS

4.1. Discussion

This dissertation sought to deepen the understanding of self-initiated expatriates' adjustment by examining influencing factors across multiple levels, namely, country, organization, and individual. The research provides a more comprehensive perspective on SIE adjustment, addressing critical gaps identified in the first article, which employed a hybrid method combining bibliometric analysis and abstract content review. This initial study confirmed that, despite increasing scholarly attention, investigations into the adjustment of international employees remain dispersed across the three analytical levels.

The examination of Lithuania and Estonia—two countries with histories of emigration transitioning from authoritarian to democratic regimes—revealed that contextual supply and demand, both work- and non-work-related, play a central role in expatriate adjustment. While these Baltic countries offer safety and developed infrastructures, lower-than-average EU salaries deter highly skilled expatriates, reflecting a mismatch between expectations and actual conditions (Duarte et al., 2021). Additionally, interviewees noted a lack of institutional support and information provided by local government agencies upon arrival, suggesting a lack of preparedness to support SIEs adequately. These insights underscore the need for targeted integration policies and reflect challenges noted in other post-Soviet and emerging economies (Fischer, 2006; Forje, 2017; Harvey & Kiessling, 2004).

Interestingly, coworker support, especially in overcoming language barriers, emerged as a positive informal mechanism for easing adjustment. This contradicts Hildisch et al. (2015), who reported social exclusion in the workplace, which suggests that contextual factors and organizational culture may moderate such experiences. Furthermore, non-work-related factors, such as public safety and institutional information, align with findings from Copeland and Griggs (1985) and Haslberger and Brewster (2008). In line with Peltokorpi (2008), social networks emerged as a critical factor for successful integration. Still, in contrast to Black et al. (1991), cultural novelty was not perceived as a significant challenge, potentially because of participants' perceived cultural similarities with the host country or their prior international experience.

At the organizational level, the third study examined the impact of organizational culture on the adjustment of SIEs. Findings show that Clan-type organizational cultures, characterized by teamwork, openness, and participatory decision-making, most effectively support SIEs. These environments provide a sense of belonging and encourage social interaction, both of which are critical for adjustment. This supports Pinto et al. (2011), who argue that a lack of workplace social networks hampers expatriate integration. By contrast, Clan cultures inherently foster social cohesion, making them particularly suitable for SIEs whose adjustment is not institutionally supported but largely dependent on the organizational climate.

On the individual level, the study explored the role of direct supervisors' international experience in supporting SIEs. The results revealed that supervisors with international or migration backgrounds—especially foreign-born supervisors—were more sensitive to the subtle signals of uncertainty expressed by SIEs and more capable of responding effectively. This aligns with Tekoppele et al. (2023), who emphasized that people interpret situational cues based on their lived experience. Although all supervisors were similarly engaged in work-related and interactional support, the research showed limited involvement in non-work-related adjustment, highlighting the narrow boundaries of workplace relationships.

By integrating findings across the country, organizational, and individual levels, this study offers a multilevel perspective on SIE adjustment. It provides empirical support for policy-level interventions, organizational culture design, and leadership development that considers the international experience of supervisors. The research also challenges existing assumptions in the expatriate adjustment literature, such as the role of cultural novelty, while emphasizing underexplored yet impactful dynamics, including informal coworker support and supervisor background. These insights not only address current research gaps but also offer practical guidance for host countries, organizations, and expatriates themselves in facilitating more sustainable adjustment processes.

4.2. Contributions

While Table 3 summarizes the dissertation's theoretical contributions and practical implications based on each analyzed level, the dissertation's novelty lies in its application of a multilevel analysis approach to the under-researched factors influencing IEs' adjustment. The dissertation presents a map for future research, as the growing global mobility of IE's necessitates research into the factors that influence IE's adjustment at the country, organization, and individual level. The results show that adjustment factors at each level affect international employees during their adjustment process in many ways and often through multiple levels.

The hybrid literature review made multiple theoretical contributions. First, the research analysis revealed that, although Black et al.'s (1991) model of expatriate adjustment remains predominantly used, adjustment studies also incorporate other theoretical constructs, such as acculturation, integration, adaptation, and occasionally assimilation (Baneviciene et al., 2024). Second, the scope and applicability of research findings are not always clear in existing research and need to be synthesized, particularly in studies on temporal and contextual factors (Baneviciene et al., 2024). Third, the analysis revealed notable research gaps that call for greater emphasis in future studies. These include the need to focus on more diverse cohorts of international employees, as existing research remains largely concentrated on assigned expatriates. Further attention should be directed towards a broader range of countries of origin and destination, demographic diversity, remote and anticipatory adjustment, and the multiple dimensions of in-country adjustment (Baneviciene et al., 2024).

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In sum, this dissertation contributes to the extension of four theoretical frameworks: (i) Person–Environment Fit, (ii) Person–Organisation Fit, (iii) Signalling theory, and (iv) Similarity–Attraction theory. In doing so, it responds to prior calls for the application and development of these conceptual lenses within international contexts. The research not only adapts these theories to the specific case of SIEs but also proposes an integrative perspective that captures the multilevel nature of their adjustment. By analysing individual, organisational, and country-level influences, the dissertation advances a nuanced understanding of how various factors interact to shape the adjustment experiences of SIEs. This theoretical and empirical expansion offers a valuable foundation for future research and practical insights into supporting globally mobile talent.

Table 3. Theoretical contributions and practical implications of the dissertation

Factors of adjustment	Contributions and implications
Country level	***Theoretical contributions:*** 1. Extended the **Person-Environment Fit** model through the demand and supply sides of work and non-work environments in the context of understudied homogenous, ex-USSR, and newly migrant-receiving countries, Lithuania and Estonia 2. Filled the gap by expanding knowledge about expatriate adjustment in societies where the immigration phenomenon is still new
	Practical implications: 1. Policy-makers should support expatriates' adjustment by providing easily accessible, practical immigration information in several languages. 2. It would be beneficial to integrate expatriates into different social activities, increasing their level of integration by providing affordable local language training. 3. Governments should invest in disseminating information abroad about the country's acceptance and integration of expatriates, as SIEs come to a host country after forming their opinions from information channels while still being abroad.
Organization level	***Theoretical contributions:*** 1. Extended **Person-Organization Fit** theory by revealing the importance of an individual's preference for a particular organizational culture 2. Expanded the understanding of the role that organizational culture typology has on SIE's adjustment.
	Practical implications: 1. Organizations should foster trust, flexibility, and a sociable organizational culture that supports SIEs' adjustment and promotes positive working relationships among international team members. 2. Organizations should prepare a welcome package that includes practical information, such as contacts, essential details about the organizational structure, main organizational rules and regulations, employee responsibilities, and information on the organizational culture and social fabric for expatriates. 3. HRM professionals should take on a more proactive and strategic role, including regular communication, cross-cultural support, training, and culturally diverse mentoring. They should acknowledge the unique challenges faced by incoming SIEs and provide supervisors with practical examples of different approaches to managing changing dynamics within their teams. 4. Incoming SIEs influence the organizational culture of companies, and local employees also require support and training to adapt to working within international teams, as well as to understand cultural, communication, and work-related differences. Therefore, the SIE adjustment issues should be studied more widely and expanded to all aspects of organizational existence. 5. As foreign-born supervisors are more relatable and attractive to lead international teams, hiring SIEs into supervisory and managerial positions would benefit organizations with international teams.

Individual level	***Theoretical contributions:*** 1. Extended **signaling theory** by analyzing it in combination with **similarity-attraction theory** and revealing how direct supervisors, drawing on their international experience, notice, interpret, and act upon uncertainty signals sent by newcomer SIEs 2. Provided an original analysis that delves into how the international experience of a direct supervisor intersects and affects incoming SIEs' adjustment
	Practical implications: 1. SIEs already working in an organization should mentor local supervisors, managers, or HRM specialists to help them prepare to integrate newcomer SIEs. 2. SIEs bring to the organization valuable skills, such as knowledge of different cultures and languages, a strong sense of agency, and work ethics – this should not be overlooked but rather acknowledged without stereotyping based on SIEs' nationality. 3. SIEs should clearly express their adjustment challenges and not rely on the assumption that their direct supervisors will notice and act in support.

4.3. Limitations and suggestions for future research

There are limitations for each of the studies performed for this dissertation. Each article's body provides a complete list of limitations and future research suggestions; therefore, only a few are highlighted here. The initial literature analysis was conducted within the Web of Science database, specifically in the business and management categories, and limited to English-language articles. These criteria limit the publications that might have been relevant to the IEs' adjustment research. Additionally, the methodological constraints of bibliometric and abstract analysis may have excluded some related articles due to the limited information provided by authors in the abstracts.

Regarding the second study, interviews with expatriates in Lithuania and Estonia were conducted prior to the COVID-19 pandemic and the onset of the Ukrainian–Russian war. As such, more recent interviews might produce different findings, given changes in the socio-political and labour market contexts, particularly the expansion of remote work and the local arrival of Ukrainian refugees. Moreover, the study did not limit the duration of expatriates' stays, which may have introduced variation in perspectives. Future research could benefit from engaging a more homogeneous group of interviewees to yield deeper insights and more consistent interpretations.

A limitation of the quantitative study was the relatively small sample size of 125 respondents from diverse global locations. While sufficient for exploratory analysis, a larger or more homogeneous sample may have produced additional or more nuanced findings. A further limitation was the omission of the national cultural context concerning organisational culture types. Analysing respondents from the same country or focusing on organisations operating within a single national context could have offered different insights. Moreover, future research should consider exploring a broader range of organisational culture typologies to deepen understanding of their influence on expatriate adjustment.

In addition, the fourth study had several methodological limitations, specifically regarding the direct supervisors' international experience and its impact on SIEs' work and non-work adjustment. The first limitation was that the study was conducted in the San Francisco Bay Area, the sixth most diverse metropolitan area in the world. Similar studies conducted in other regions of the United States or different national contexts may provide further insights into this phenomenon. A second limitation is the exclusive focus on supervisors with international experience. Including supervisors without such experience in future research could enable a comparative analysis. Additionally, examining the perspectives of SIEs who report to supervisors with and without international experience may uncover important similarities and differences in perceptions and interpretations of uncertainty signals, potentially leading to novel and valuable findings.

Finally, several limitations exist in the multilevel analysis approach presented in the dissertation. Initially, the author acknowledges their positionality in conducting this research, including a personal interest in global mobility and exposure to international work environments, which informed the decision to focus on SIEs. This perspective provided both motivation and sensitivity in exploring the nuances of SIEs' adjustment across individual, organizational, and country levels. At the same time, the author remained reflexively aware of potential biases in data interpretation, particularly when engaging with qualitative narratives. By adopting a multilevel approach and utilizing both quantitative and qualitative methods, the study aimed to offer a more comprehensive understanding of SIEs' adjustment. While this methodological pluralism enriched the findings, it also presented challenges, such as integrating insights from different data types and ensuring coherence in the theoretical framework.

Furthermore, only a single factor from each level was analyzed: a study of a factor that affects SIEs' adjustment at all three levels or a study of multiple factors within the same level would facilitate comparative analysis and yield additional findings. Moreover, as the dissertation analyzed SIEs' adjustment factors at three levels — country, organization, and individual — introducing additional levels, such as the family level or social non-work network level, would provide further insights. Limitations such as sample heterogeneity, context-specificity, and the exclusion of other stakeholder perspectives are acknowledged.

Despite these constraints, the dissertation contributes to advancing theory and practice by addressing underexplored dimensions of SIE adjustment and offering a flexible framework for future research across diverse contexts.

4.4. Conclusions

This dissertation makes a significant contribution to the field ot international human resource management by examining the adjustment of self-initiated expatriates. By integrating country-, organization-, and individual-level perspectives, it addresses critical theoretical and empirical gaps in the global mobility literature,

which have long been dominated by studies of assigned expatriates. The multilevel analytical approach is grounded in a systematic literature review and three studies employing both qualitative and quantitative methods.

In response to the research objectives, the following conclusions can be formulated:

1. ***A systematic review of 32 years of research on the adjustment of international employees revealed a growing academic interest in the topic.*** To advance adjustment theory, more research is needed across all three levels—country, organizational, and individual. Notably, future studies should broaden the diversity of sampling in terms of demographics, expatriate types, nationalities, and local populations (for details see Publ. I: Banevičienė et al., 2024).

2. ***The analysis of country-level factors revealed that governmental and institutional structures in countries transitioning from authoritarian to democratic regimes are often unprepared to support incoming expatriates, particularly where their presence is still relatively new.*** To deepen the understanding of SIEs' adjustment at the country level, the cases of Lithuania and Estonia were examined. Revealed results underscore the need for more targeted policies and integration measures to facilitate the successful adjustment of SIEs in such contexts, which should include support structures, easy access to general information that is not only in the host country language, contacts and essential information about organizational structure and role expectations, help to integrate into different social activities (see Publ. II: Kumpikaitė-Valiūnienė et al., 2024).

3. ***The results of the organization-level factors' analysis indicated that a Clan-type organizational culture best aligns with the needs and values of SIEs.*** To advance the understanding of SIEs' adjustment by investigating organization-level factors, the type of organizational culture was analyzed. Environments created by the Clan organizational type foster a sense of belonging and positively influence both work-related and non-work-related aspects of SIEs' adjustment (see Publ. III: Kumpikaitė-Valiūnienė et al., 2022).

4. ***The results of individual-level factors' research highlighted that the international experience of the direct supervisor significantly affects the adjustment of SIEs.*** To advance the understanding of SIEs' adjustment by investigating individual-level factors, the international experience and background of direct supervisors were examined. Foreign-born supervisors, in particular, were more attuned to SIEs' signals of uncertainty and better able to support their adaptation than locally born supervisors, even when the latter had international experience (see Publ. IV: Baneviciene et al., 2025).

5.   SANTRAUKA

Šioje disertacijoje sistemingai nagrinėjami savarankiškai išvykstančių ekspatriantų (angl. *self-initiated expatriates*, SIE) adaptacijos procesai, taikant integruotą daugialygią analizę, apimančią šalies, organizacinius ir individualius veiksnius. SIE, motyvuoti ekonominių, profesinių ir asmeninių tikslų, patys inicijuoja persikėlimą į užsienio šalis, dažniausiai be institucinio pasirengimo ar organizacinės paramos. Dėl to jų adaptacijos iššūkiai yra daugiau komplikuoti nei organizacijų siunčiamų ekspatriantų (angl. *assigned expatriates*, AE), kurie tradiciškai sulaukia siunčiančios organizacijos paramos. Nors skaičiuojama, kad SIE gali sudaryti daugiau nei pusę visų ekspatriantų globaliu mastu, daugumoje akademinių tyrimų vis dar koncentruojamasi į AE patirtis. Šia disertacija siekiama užpildyti akivaizdžią informacijos spragą, susijusią su teoriniu diskursu apie SIE adaptaciją, pasiūlant konceptualiai inovatyvų, empiriškai pagrįstą daugialygį analitinį požiūrį.

Tyrimo problema, tikslas ir uždaviniai

Pagrindinė disertacijoje nagrinėjama tyrimo problema – ribotas mokslinis supratimas apie savarankiškai išvykstančių ekspatriantų adaptacijos procesus, ypač daugialypėje, tarpusavyje sąveikaujančioje aplinkoje. Nors savarankiškai išvykstančių ekspatriantų kiekis tarptautinėje darbo rinkoje auga, tyrimų analizuojančių jų adaptacijos patirtis vis dar stokojama akademinėje literatūroje, ypač integruojant daugialygį požiūrį ir savarankiškai išvykstančių ekspatriantų adaptaciją analizuojant šalies, organizacinius ir individualius veiksnius. Ši žinių spraga trukdo kurti veiksmingas žmogiškųjų išteklių praktikas, organizacinės paramos sistemas ir viešosios politikos priemones, atitinkančias savarankiškai išvykstančių ekspatriantų poreikius. Be to, daugumoje empirinių tyrimų ir teorinių modelių koncentruojamasi į siunčiamų ekspatriantų adaptaciją – tai apriboja teorijų taikymo galimybes. Todėl savarankiškai išvykstančių ekspatriantų, susiduriančių su didesniais adaptacijos iššūkiais, patirtys globalios mobilumo politikos tema lieka nuošalyje.

Tyrimo klausimas: kokie šalies, organizaciniai ir individualūs veiksniai daro įtaką savarankiškai išvykstančių ekspatriantų adaptacijai?

Disertacijos objektas – savarankiškai išvykstančių ekspatriantų adaptacija, ypač skiriant dėmesį šalies, organizaciniams ir individualiems veiksniams, turintiems įtakos jų adaptacijai priimančiose šalyse.

Disertacijos tikslas – išsiaiškinti savarankiškai išvykstančių ekspatriantų adaptacijos supratimą nustatant ir analizuojant šalies, organizacinius ir individualius veiksnius, darančius įtaką jų adaptacijai.

Disertacijos uždaviniai:

1. atlikti sisteminę literatūros analizę siekiant identifikuoti tyrimų spragas ir pasiūlyti būsimas tyrimo kryptis savarankiškai išvykstančių ekspatriantų adaptacijos srityje;

2. tobulinti savarankiškai išvykstančių ekspatriantų adaptacijos supratimą, papildant asmens-aplinkos atitikimo (P-E Fit) teoriją analizuojant šalies veiksnius;

3. tobulinti savarankiškai išvykstančių ekspatriantų adaptacijos supratimą, papildant asmens-organizacijos atitikimo (P-O Fit) teoriją tyrinėjant organizacinius veiksnius;

4. tobulinti savarankiškai išvykstančių ekspatriantų adaptacijos supratimą, papildant signalų (angl. signaling) ir panašumo-traukos (angl. similiarity-attraction) teorijas tiriant individualius veiksnius.

5. Disertaciją sudaro keturi tarpusavyje susiję moksliniai straipsniai, atliepiantys darbo tikslą ir jam pasiekti suformuluotus uždavinius. Kiekvienas straipsnis atspindi vieną iš analizuojamų uždavinių ir prisideda teoriniu, metodologiniu bei praktiniu požiūriu prie tarptautinės žmogiškųjų išteklių valdymo srities.

Mokslinis naujumas

Disertacijos mokslinis naujumas atsiskleidžia per unikalų daugialygį analitinį požiūrį ir per esamų teorijų plėtrą bei naujų koncepcinių ir empirinių įžvalgų pateikimą ekspatriantų adaptacijos srityje. Svarbiausios naujovės ir indėlis išdėstyti toliau.

1. **Daugialygė savarankiškai išvykstančių ekspatriantų adaptacijos veiksnių integracija.** Esamuose tyrimuose adaptacijos veiksniai dažniausiai nagrinėjami atskirai (pvz., tik individualiu ar organizaciniu lygmeniu), o ši disertacija apjungia visus tris lygmenis – šalies, organizacijos ir individo – ir atskleidžia jų tarpusavio sąveiką bei priklausomybę.

2. **Teorinių modelių plėtra.**

- Šalies lygmeniu naudojama asmens ir aplinkos atitikimo (P–E Fit) teorija, įtraukiant darbo ir nedarbo aplinkos lūkesčių bei pasiūlos analizę. Ši teorija pirmą kartą taikoma ekspatriantų adaptacijai Lietuvoje ir Estijoje analizuoti – mažai tirtose homogeninėse, buvusiose SSRS šalyse, kurios iš emigrantus siunčiančių tapo imigrantus priimančiomis šalimis.

- Organizacijos lygmeniu – plėtojama asmens ir organizacijos atitikimo (P–O Fit) teorija, empiriškai įrodant, kad savarankiškai išvykstančių ekspatriantų adaptacija yra glaudžiai susijusi su klano tipo organizacine kultūra, kuri remiasi pasitikėjimu, bendradarbiavimu ir socialine sanglauda. Taip pat straipsnyje atskleidžiama, kaip skirtingi organizacinės kultūros tipai palengvina arba apsunkina savarankiškai išvykstančių ekspatriantų adaptaciją.

- Individo lygmeniu – integruojama signalų teorija ir panašumo-traukos teorija siekiant paaiškinti, kaip priimančios šalies vadovai interpretuoja savarankiškai išvykstančių ekspatriantų netikrumo signalus. Šis derinys leidžia atskleisti, kaip patirties ir santykių panašumai tarp priimančios šalies vadovų ir SIE prisideda prie palankesnės adaptacinės aplinkos kūrimo.

3. **Metodologinis indėlis**. Disertacijoje taikomas hibridinis literatūros apžvalgos metodas, integruojantis bibliometrinę ir sisteminę mokslinės litaratūros analizę, kokybinius interviu ir kiekybinius apklausų duomenis, kas leidžia sistemingai apibendrinti skirtingų tyrimų perspektyvas siekiant tikslo.

4. **Kontekstinis naujumas**. Šalies veksnių analizė orientuota į regionus (Rytų Europa) ir migracijos profilius (savarankiškai išvykstantys ekspatriantai), kuriems dažnai skiriamas nepankamas dėmesys globalaus mobilumo tyrimuose. Analizuojant šalis, kurios palyginus neseniai pradėjo priimti ekspatriantus ir dar turi ribotą imigracijos infrastruktūrą, tyrimas pateikia įžvalgų, ypač aktualių besivystančioms ekonomikoms, siekiančioms pritraukti ir išlaikyti tarptautinius talentus.

5. **Praktinis reikšmingumas.** Disertacijoje pateikiamos konkrečios rekomendacijos viešosios politikos formuotojams, žmogiškųjų išteklių specialistams ir organizacijų vadovams. Pateikiamos strategijos siekiant pagerinti savarankiškai išvykstančių ekspatriantų adaptaciją: kalbos mokymo programos, kultūriškai jautrūs lyderystės mokymai ir strategiškas kitos kilmės vadovų samdymas.

Publikacijų tarpusavio sąsajos, indėlis į disertacijos tikslų įgyvendinimą ir pagrindiniai rezultatai

Disertaciją sudaro keturi tarpusavyje susiję moksliniai straipsniai, kuriuose siekiama išsiaiškinti konkretų tyrimo uždavinį ir kuriais prisidedama prie daugialygio adaptacijos požiūrio kūrimo.

1 publikacija. Hibridinė literatūros apžvalga – nustato temines, metodologines ir kontekstines spragas esamoje literatūroje. Įgyvendinant 1-ąjį uždavinį buvo išskirtos mažiau ištirtos savarankiškai išvykstančių ekspatriantų adaptacijos sritys. Šioje publikacijoje atskleidžiamas organizacijos siųstų ekspatriantų adaptacijos tyrimų dominavimas, ribotas tiriamų šalių spektras (daugiausia tyrimų atlikta Vakarų šalyse) ir retas daugialygio požiūrio taikymas. Nustatomas būtinas, savarankiškai išvykstančių ekspatriantų adaptacijos tyrimų poreikis, ypač netradicinėse (ne Vakarų pasaulio) šalyse.

2 publikacija. Šalies veiksnių tyrimas, atliktas remiantis kokybiniu tyrimu Lietuvoje ir Estijoje, išplečia asmens ir aplinkos atitikimo teoriją. Jame analizuojama, kaip darbo ir nedarbo aplinkos pasiūla ir paklausa formuoja savarankiškai išvykstančių ekspatriantų adaptaciją. Šiuo tyrimu siekiama 2-ojo uždavinio. Straipsnyje atskleidžiami kontekstiniai priimančių šalių skirtumai, lemiantys ekspatriantų patirtis. Šioje publikacijoje išryškinami savarankiškai išvykstančių ekspatriantų adaptacijos susijusios su biurokratija, institucinės paramos trūkumu ir ribota integracijos infrastruktūra iššūkiai. Tačiau neformalus bendradarbių palaikymas ir saugumo pojūtis padeda jų adaptacijai. Šie rezultatai ypač aktualūs analizuojant postsovietines šalis.

3 publikacija. Organizacinių veiksnių tyrimas atliktas remiantis kiekybine savarankiškai išvykstančių ekspatriantų apklausa identifikuoja palankiausią

adaptacijai organizacinės kultūros tipą. Straipsniu siekiama atsakyti į 3-ąjį uždavinį, kuriuo prisidedama prie asmens ir organizacijos atitikimo teorijos plėtros. Šioje publikacijoje identifikuojama klano kultūra, kaip labiausiai palanki savarankiškai išvykstančių ekspatriantų adaptacijai – pabrėžiant pasitikėjimo, sanglaudos ir įtraukties svarbą. Adhokratinė kultūra taip pat naudinga dėl inovatyvumo ir lankstumo. Rinkos ir hierarchijos kultūros nėra palankios savarankiškai išvykstančių ekspatriantų adaptacijai.

4 publikacija. Individualūs veiksniai – kokybinis tyrimas, atskleidžiantis, jog priimančios šalies vadovai, turintys tarptautinės patirties, geriau atpažįsta savarankiškai išvykstančių ekspatriantų neapibrėžtumo signalus ir užtikrina efektyvesnę paramą. Šiame tyrime nagrinėjamas 4-asis uždavinys. Siekiama išanalizuoti savarankiškai išvykstančių ekspatriantų adaptaciją individo lygmeniu per vadovų patirtis. Tyrime integruojamos signalų ir panašumo-traukos teorijos siekiant atskleisti, kaip tiesioginių vadovų tarptautinė patirtis turi įtakos remiant savarankiškai išvykstančius ekspatriantus ir padedant jiems prisitaikyti. Patirtinis panašumas tarp vadovo ir ekspatrianto sustiprina tarpusavio ryšius ir teigiamai veikia adaptacijos rezultatus.

Šiuose straipsniuose analizuojami skirtingais lygmenimis savarankiškai išvykstančių ekspatriantų adaptacijos veiksniai, kurie integruoja kiekybinius ir kokybinius tyrimo metodus. Kartu jie suformuoja daugialygį teorinį požiūrį, atskleidžiantį šalies, organizacinių ir individualių veiksnių sąveiką SIE adaptacijos procese.

Išvados

Ši disertacija, kurioje analizuojama savarankiškai išvykstančių ekspatriantų adaptacija, reikšmingai prisideda prie tarptautinio žmogiškųjų išteklių valdymo. Kartu analizuojant šalies, organizacinius ir individualius veiksnius yra užpildomos esminės teorinės ir empirinės spragos mokslinėje literatūroje, susijusioje su globaliu mobilumu, nes ilgą laiką dominavo tik organizacijos siųstų ekspatriantų tyrimai. Daugialygis analitinis požiūris yra paremtas sistemine literatūros apžvalga ir trimis originaliais tyrimais taikant kokybinius ir kiekybinius metodus.

1. Sisteminė tarptautinių darbuotojų adaptacijos tyrimų, vykdytų per 32 metus, analizė atskleidė didėjantį akademinį susidomėjimą šia tema. Remiantis analize, būtini tyrimai visais trimis lygmenimis – šalies, organizacijos ir individo. Ypač svarbu plėsti imties įvairovę pagal demografiją, ekspatriantų tipus, tautybes ir vietinius gyventojus.

2. Šalies veiksnių analizė atskleidė, kad šalių, pereinančių iš autoritarinių į demokratinius režimus, vyriausybinės ir institucinės struktūros dažnai nėra pasirengusios remti atvykstančius emigrantus, ypač tose šalyse, kur jų buvimas dar gana naujas. Siekiant geriau suprasti savarankiškai išvykstančių ekspatriantų adaptaciją šalies lygmeniu, buvo išnagrinėti Lietuvos ir Estijos atvejai. Remiantis analize galima teigti, kad reikia tikslingesnių politikos ir integracijos priemonių, kurios padėtų savarankiškai išvykstančių ekspatriantų adaptacijai tokiose šalyse,

įskaitant paramos struktūras, lengvą prieigą prie bendros, pateikiamos ne tik priimančiosios šalies kalba, informacijos, taip pat kontaktus ir esminę informaciją apie organizacinę struktūrą, pagalbą integruojantis į įvairią socialinę veiklą.

3. Organizacinių veiksnių analizės rezultatai parodė, kad klano tipo organizacinė kultūra geriausiai atitinka savarankiškai išvykstančių ekspatriantų poreikius ir vertybes. Siekiant geriau suprasti savarankiškai išvykstančių ekspatriantų adaptaciją organizacijos lygmeniu, buvo anlizuojami organizacinės kultūros tipai. Nustatyta, kad klano organizacinio kultūros tipo sukurta aplinka skatina priklausymo jausmą ir teigiamai veikia tiek su darbu susijusius, tiek su darbu nesusijusius, savarankiškai išvykstančių ekspatriantų adaptacijos aspektus.

4. Individualių veiksnių tyrimas parodė, kad tiesioginio vadovo tarptautinė patirtis turi didžiulę įtaką savarankiškai išvykstančių ekspatriantų adaptacijai. Siekiant geriau suprasti savarankiškai išvykstančių ekspatriantų adaptaciją individualiu lygiu, buvo nagrinėjama tiesioginių vadovų tarptautinė patirtis. Galima teigti, kad užsienyje gimę vadovai geriau atpažįsta netikrumo signalus, kuriuos siunčia savarankiškai išvykstantys ekspatriantai ir labiau juos palaiko nei vietiniai vadovai, net jei šie taip pat turi tarptautinės patirties.

Disertacija pateikia įrodymais pagrįstas rekomendacijas politikos formuotojams, organizacijų vadovams ir žmonių išteklių vadybos specialistams: diegti įtraukią imigracijos politiką, skatinti palaikančias organizacines kultūras, strategiškai samdyti arba rengti kultūriškai kompetentingus vadovus. Tyrimai taip pat sudaro pagrindą savarankiškai išvykstančių ekspatriantų mentorystės programų, tarpkultūrinio mokymo modulių ir paramos sistemų kūrimui.

Atsakydama į įtraukiančių, kontekstu pagrįstų adaptacijos modelių poreikį, ši disertacija pateikia aktualų ir patikimą pagrindą būsimiems tyrimams bei praktiniam pritaikymui. Ji prisideda prie teorinės pažangos, empirinio aiškumo ir remia politikos bei vadybos sprendimų kūrimą, skatina globalių talentų adaptaciją vis labiau tarptautinėje darbo rinkoje.

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Declaration of generative AI and AI-assisted technologies in the writing process

Statement: during the preparation of this dissertation, the author used ChatGPT in order to edit language and text structure, not for writing text. After using this tool, the author reviewed and edited the content as needed and takes full responsibility for the content of the dissertation.

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REVIEW ARTICLE

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Assessing the status quo of international employees' adjustment research, 1990–2022: a review and future research agenda

Irma Baneviciene[1✉], Maike Andresen[2] & Vilmante Kumpikaite-Valiuniene[3]

This study aims to comprehensively review scientific journal articles related to the adjustment of international employees within the management and business domain from 1990 to 2022. The study seeks to identify trends and patterns in research topics and to propose a future research agenda. To achieve this, we analysed 222 articles from the Web of Science Core Collection database through two main steps: (1) a bibliometric analysis to track the field's evolution over time and (2) a content analysis of abstracts to examine covered topics and pinpoint research gaps. Our findings indicate that the theory surrounding the adjustment of international employees is still in the process of maturation, with several potential areas for future research emerging. The analysis reveals that factors influencing adjustment are the most extensively researched for assigned expatriates, leaving other international employees relatively under-researched. Moreover, quantitative research emerged as the most prevalent methodological approach among the included studies. Most study samples predominantly consisted of individuals moving between Asia, Europe, and North America, underscoring the significance of Africa—characterised by substantial migration flows within the region—as a focal point for future adjustment research. Moreover, individual-, organisation-, and country-related antecedents of international employees' anticipatory and in-country adjustments were analysed to present conclusions for future research. This study supplements the domains of international human resource management and international business by identifying research priorities concerning the adjustment of international employees and outlining an agenda for further research.

Introduction

E conomic globalisation facilitates the movement of people, capital, goods, and ideas across borders, leading to a significant rise in international mobility among the workforce, a trend that is of global relevance (Duan et al. 2021). According to the International Organisation for Migration (IOM UN Migration 2022), the global population of international migrants

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reached approximately 281 million in 2020, representing 3.6% of the world's population. This figure marks a significant increase from previous years, with 128 million more international migrants than in 1990 and over three times the number reported in 1970 (IOM UN Migration 2022). The adjustment of these individuals to new countries and organisations varies depending on factors such as language barriers, geopolitical dynamics, cultural differences, and familial status. Therefore, research into working people's international mobility and adjustment has gained much attention from researchers worldwide.

A review of previous studies on adjustment highlights a predominant focus on cross-cultural issues, including the development of adjustment over time, the influence of prior international experience, cross-cultural training, and intercultural learning (Chenyang 2022; Morris et al. 2014; Nam et al. 2014; Takeuchi and Chen, 2013). Additionally, numerous antecedents of expatriate adjustment have been examined, such as personality traits, expatriate-local interactions, family dynamics, and organisational factors (Van Bakel 2019; Dang et al. 2022; Harari et al. 2018; Haslberger and Brewster 2008; Kang and Shen 2018; Takeuchi 2010). Similarly, studies by Hajro et al. (2019), Schudey et al. (2012), and Shen and Hall (2009) explored the influences of individual, organisational, and social variables on migrants' acculturation, coping mechanisms and integration, as well as repatriate readjustment.

This review makes a unique contribution by focusing on the factors influencing the adjustment of different groups of international employees, namely expatriates and migrants. Through systematic literature mapping, it delineates the scope of existing research on adjustment, its evolution over time, and differences between employee groups. By aligning findings with macro-level migration data, the study identifies research gaps and priorities, which are crucial for enhancing our understanding of adjustment processes and informing future research directions. This unique approach aims to advance research on the adjustment of international employees (IE), thereby contributing to the existing body of knowledge on international human resource management and international business.

The literature reveals a plethora of definitions of IEs based on various factors such as mobility patterns, employment characteristics, education level, support availability, and planned duration of stay in a foreign country. However, these definitions often overlap, and authors tailor unique definitions to suit their research needs (Andresen et al. 2018). Common types of IEs include assigned expatriates, self-initiated expatriates (SIEs), sojourners, migrants, international business travellers, short-term assignees, rotational assignees, and international commuters, with SIEs, assigned expatriates, skilled migrants, and skilled immigrants being the most frequently discussed groups in the literature (Andresen et al. 2014; McNulty and Selmer 2017; Cerdin and Selmer 2014; McNulty and Brewster 2017).

The adjustment of IEs is multifaceted and varies depending on the type of IE and the circumstances surrounding their becoming IEs (Shaffer et al. 1999). According to Waxin and Panaccio (2005), the intercultural adjustment of expatriates is defined as a ratio of human psychological comfort and knowledge of a foreign culture. However, scholars have offered differing definitions of intercultural adjustment, with terms such as adjustment, adaptation, assimilation, acculturation, and integration often used interchangeably (Harrison et al. 2004). In this study, "adjustment" is the standard term to denote realigning one's needs with new cultural demands after relocating to an unfamiliar cultural environment (Aycan 1997; Bhaskar-Shrinivas et al. 2005).

Against this backdrop, a hybrid literature review was conducted, combining bibliometric analysis and content analysis of scientific article abstracts published between 1990 and 2022.

Generated systematic literature mapping aimed to (1) provide insights into the field's evolution over time; (2) identify research trends, priorities, and critical areas; (3) pinpoint research gaps for future exploration.

This study contributes to adjustment theory in five key ways. Firstly, it highlights the need to refine the adjustment construct's definition, conceptual landscape, nomological network, and causal mechanisms. Secondly, it underscores the importance of systematically identifying the boundary conditions of adjustment theory. Thirdly, it tracks evolutionary nuances to anticipate the trajectory of adjustment research. Fourthly, it identifies critical knowledge gaps to inform future research directions. Finally, recommendations for research methods are provided to facilitate the evolution of adjustment theory from an intermediate to a mature state.

The paper has been structured into four parts. The first part defines adjustment together with an overview of its most essential antecedents that can be identified in the literature. It expounds upon the methodology and strategy used in the study. The second part presents the findings of the bibliometric analysis that indicates general information such as publication year, country, and the research sample's nationality. The third part covers the content analysis of the abstracts with the presentation of the covered themes and research areas. The final part then discusses the main results and limitations and outlines future research areas.

Theoretical background

The adjustment model proposed by Black et al. (1991) depicts the factors influencing adjustment and refers to the group of assigned expatriates. The authors differentiate between *anticipatory* and *in-country* adjustment, representing two stages of the expatriate cross-cultural adjustment process. *Anticipatory* adjustment, which occurs before the international relocation, is determined by *individual* factors, such as training and previous experience and *organisational* factors, such as selection mechanisms and criteria. It is assumed that individuals' anticipatory adjustment, i.e., their preparation before they embark on the journey to the host country, will ease their adjustment abroad. Black et al. (1991) highlighted four influencing factors related to *in-country* adjustment, which takes place upon relocation to the destination country, that relate to the sphere of the *individual* (self-efficacy, relation skills, and perception skills), *job* (role clarity, role discretion, role novelty, role conflict), *organisation* (organisation culture novelty, social support, logistical help, socialisation tactics, socialisation content), and *nonwork* (culture novelty and family-spouse adjustment). The in-country adjustment process leads to different degrees of adjustment in terms of *work, interaction*, and *general* adjustment in the country of destination that can be measured.

Subsequent researchers delving into adjustment and extending the framework proposed by Black et al. (1991) revealed additional factors influencing anticipatory and in-country adjustment. For instance, Yijälä et al. (2012) investigated the anticipatory adjustment of highly skilled, self-initiated foreign employees, shedding light on specific challenges and strategies pertinent to this cohort. They differentiate between *psychological, socio-psychological*, and *work-related* anticipatory adjustment. Lett and Smith (2009) distinguished – analogous to Black et al. (1991) – *pre-departure* and *in-country* adjustment and highlight *individual, organisational, job*, and *non-work* factors that impact adjustment before and after moving to the destination country.

Ritchie et al. (2015) expanded on general adjustment following relocation by identifying additional precursors, including job satisfaction, team cohesion, and alignment with organisational values. Additionally, they advocate for the incorporation of
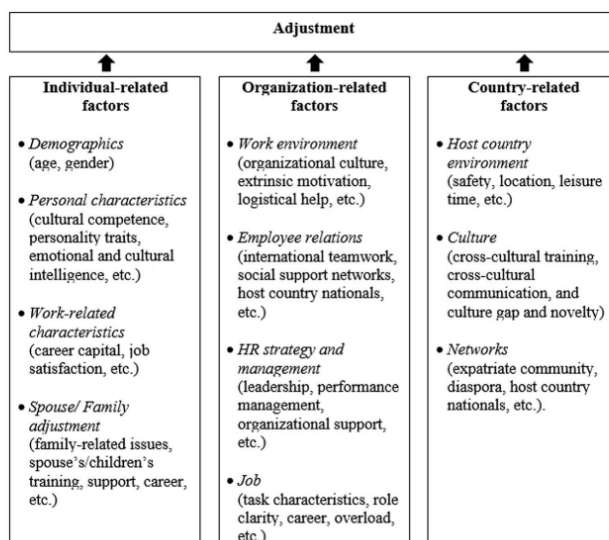
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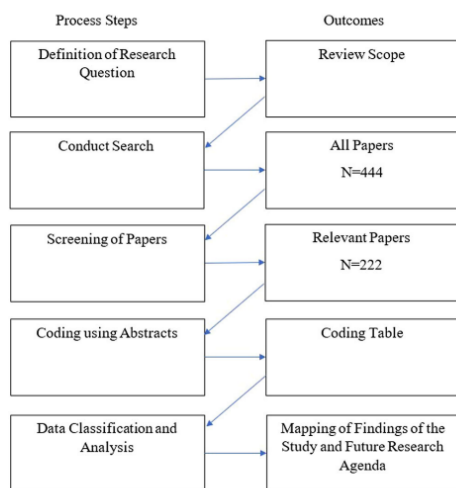Fig. 1 Model of factors influencing IE adjustment.

Fig. 2 Study mapping process.

control variables related to demographics and individual traits such as gender, family status, parental responsibilities, professional background, tenure, and linguistic abilities (Caligiuri et al. 1998; Canhilal et al. 2015; Chen 2010; Lee et al. 2014), a recommendation that subsequent scholars have adopted in their studies. Hippler et al. (2014) divided their scale into ten factors delineating various aspects or changes that may necessitate adjustment. These factors encompass aspects of the work environment, language proficiency, job or task attributes, recreational

activities, urban setting, work-life balance, living accommodations, familial dynamics, local social connections, and communication with those remaining behind. This approach shows that *work-related* facets of IEs' adjustment receive the least attention.

After reviewing the antecedents of adjustment proposed by different authors (e.g., Black et al. 1991; Caligiuri et al. 1998; Chen, 2010; Hippler et al. 2014; Lee et al. 2014; Lett and Smith, 2009; Ritchie et al. 2015), both similarities and some differences become apparent. Based on this overview, we group the antecedents of IEs' adjustment (anticipatory and in-country) into the following main groups: individual-, organisation-, and country-related antecedents (see Fig. 1).

Methods
The study aims to achieve several objectives: firstly, to offer a comprehensive overview of the evolution of research within the adjustment field over time, including the types of international employees (IEs) whose adjustment is being researched, the terminology utilised to describe 'adjustment' in publications, and the research methodologies employed. Secondly, it seeks to identify trends in research topics, delineate research priorities, and highlight critical research areas. Lastly, the study aims to uncover research gaps that necessitate attention in future studies.

The methodology employed in our study, illustrated in Fig. 2, follows an adapted systematic mapping approach proposed by Petersen et al. (2008). This approach enables the collation, description, and cataloguing of available evidence, as elucidated by James et al. (2016). By adopting this approach, we can provide a broad overview of a research field and identify the amount and type of research in this field (Petersen et al. 2008; Soaita et al. 2020), as elaborated upon in subsequent sections.

For analysis purposes, we utilised the Web of Science (WoS) Core Collection database, renowned as one of the premier platforms for scientific citation search, discovery, and analytical information (Li et al. 2018). Scholars frequently rely on this database for bibliometric analyses (Vlase and Lähdesmäki 2023).

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With its comprehensive coverage spanning articles from 1900 onwards (Chadegani et al. 2013), the WoS database provides a robust foundation for gaining insights into trends in academic research on IEs' adjustment, a vital component of this study.

To conduct our literature search, we established specific inclusion criteria. We designated the base timeframe for the search period from 1990 to 2022 (July). Within the WoS platform, we focused on the management and business categories, representing the primary disciplines relevant to international employees' adjustment. Articles were restricted to published in English, the predominant language for international collaboration.

We formulated search terms targeting IEs and an adjustment in identifying relevant articles. For the IE aspect, keywords such as immigrant, migrant, and expatriate were employed. Concerning adjustment, the terms adaptation, assimilation, acculturation, and integration were selected, aligning with the terminology outlined by Harrison et al. (2004) as synonymous with adjustment. The search terms were combined of the two search fields into a search string using "AND" to search the title, abstracts, or keywords of the articles, i.e. (immigra* OR migra* OR expatriat*) AND (adjust* OR adapt* OR assimilat* OR acculturat* OR integrat*). As an additional criterion, it was stipulated that one of the keywords related to adjustment must be present as an article keyword. Article keywords were meticulously chosen by authors to accurately encapsulate the essence of their paper (Emich et al. 2020; Zhang et al. 2016). Hence, if authors perceive their article as directly pertinent to adjustment, they are inclined to opt for the term as a keyword.

The search yielded a total of 444 articles. The abstracts of these articles were imported into the MAXQDA software, commonly used for qualitative and mixed methods research. Each abstract was meticulously reviewed to confirm its relevance to IE adjustment. In cases where abstracts lacked clarity and inclusion or exclusion was uncertain, the introduction or conclusion of the paper was consulted for clarification (Petersen et al. 2008). Out of the initial pool, 222 articles were identified as unrelated to IE adjustment, focusing instead on consumer acculturation's impact on product selection, micromarketing issues regarding immigration and acculturation, and differences in labour and capital incomes between immigrants and natives. The final selection of the articles for the study consists of 222 articles.

A hybrid approach combining bibliometric analysis and structured review was adopted to analyse the data and achieve the research objectives, following the framework proposed by Paul and Criado (2020). Bibliometric analysis provided insights into the evolution of the field and trends in articles on adjustment and their prevalence concerning types of international employees published from 1990 to 2022. Concurrently, structured review techniques, including content analysis, were employed to identify research trends and uncover research gaps (Paul and Criado 2020). Content analysis systematically condenses extensive text into categories based on predefined coding rules, facilitating the identification of document trends and patterns (Stemler 2000), thus offering a systematic and objective means of describing and quantifying phenomena (Downe-Wamboldt, 1992).

The initial coding process involved 50 articles from the corpus of 222, conducted by one author and subsequently reviewed by other authors. The coding system was refined through discussions among the authors, ensuring consensus. Following this, the 50 initial abstracts were re-analysed, and all remaining abstracts were subjected to the established coding rules. (1) Main categories were created for all statistical data: publication year, research method, terminology of 'adjustment' used in the articles, country of research, nationality of participants, and type of IE. (2) Deductive categories of anticipatory and in-country adjustment were utilised

to examine the antecedents of IE adjustment. Each category was further subdivided into individual-related, organisation-related, and country-related antecedents. Inductive codes were then defined for each identified antecedent and assigned to the deductive categories (refer to Table 1 for details).

All statistical data and specified antecedents underwent coding based on the abstracts. A total of 1522 coding instances were assigned. The total number of codings per category sometimes varied from the total number of articles in the corpus. This discrepancy occurred because not all articles included information relevant to every category, or multiple subcategories within an article were pertinent, resulting in multiple codings. For instance, if an article examined and assigned expatriates and self-initiated expatriates within its sample, two codings were recorded under the IE type category.

The interrelationships among the categories were analysed to identify prevalent themes and underlying patterns of connection.

Results

General information

Field progression over time. A total of 222 articles spanning from 1990 to 2022 were subjected to analysis (refer to Fig. 3). The distribution of articles across each year within this timeframe reveals distinct phases in the evolution of interest in IE adjustment research: before 1999, between 2000 and 2016, and from 2017 onwards. Before 1999, sporadic publications occurred every few years (a total of five), indicating budding interest in the field without establishing it as a full-fledged area of research. From 2000 to 2016, researchers consistently, albeit modestly, addressed IE adjustment, with the number of published articles gradually increasing from two per year to a maximum of 12 in specific years. Notably, since 2017, 27 years after the first publication on IE adjustment, the annual publication count has consistently reached 20 or more, albeit not every year. This sustained growth in publications within the management and business domains reflects rising scholarly interest in IE adjustment. Such findings affirm our initiative to delve into topic diversity, identify research gaps, and contribute to the future advancement of the field.

Types of IEs researched. Coding the type of IEs studied in the articles in the corpus generated 230 codings (see Fig. 4). Based on the terminology used in the abstracts by the researchers themselves to elucidate the types of IEs studied in each case, two subcategories of IEs were generated: (a) expatriates (assigned expatriates and self-initiated expatriates) and (b) migrants (migrant workers, immigrants, and skilled/qualified migrants).

In comparison, a more significant proportion of articles concentrated on the expatriate cohort (197 articles) than the migrant cohort (33 articles). Specifically, assigned expatriates emerged as the most extensively studied subgroup within the expatriate cohort, with 165 articles dedicated to their adjustment consistently appearing in the scientific literature over the years. Notably, research on the adjustment of assigned expatriates commenced as early as 1990 and has steadily escalated since 2000. The period post-2017 witnessed a sustained and notable volume of articles on assigned expatriates, indicating continued scholarly interest in this area.

Conversely, a significantly smaller number of research publications delved into the adjustment of self-initiated expatriates (SIEs) (32 articles), albeit ranking as the second highest. Interestingly, the earliest article addressing the adjustment of SIEs only emerged in 2008. Although the number of articles SIEs has remained relatively low over the years, there was a notable surge in 2021 with nine articles. Nonetheless, research on SIEs has persisted since 2012, albeit in limited numbers.

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Table 1 Coding table.

Category System	Frequency of codings per category	Frequency of codings per subcategory	Frequency in first-order codes	Frequency in second-order codes
Publication year	222			
International employee types	230			
Expatriates		197		
Assigned expatriates			165	
Self-initiated expatriates			32	
Migrants		33		
Migrant workers			4	
Immigrants			20	
Skilled/Qualified migrants			9	
General adjustment topics	61			
New model/enhancement propositions		17		
Testing of models		9		
Looking for antecedents of adjustment (specific situation)		22		
Adjustment as mediator		13		
Terminology of "adjustment"	222			
Acculturation		19		
Adaptation		22		
Adjustment		167		
Assimilation		2		
Integration		12		
Research methods	186			
Methodological choice		166		
Quantitative			119	
Qualitative			36	
Mixed methods			11	
Strategy		8		
Case study			2	
Secondary sources			6	
Time horizon		12		
Longitudinal			12	
Country where research is performed	149			
Nationality/ethnicity of participants	96			

Table 1 (continued)

Category System	Frequency of codings per category	Frequency of codings per subcategory	Frequency in first-order codes	Frequency in second-order codes
Anticipatory adjustment	33			
Individual – related		19		
Language proficiency			1	
Motivation to migrate			3	
Pre-departure expectations			4	
International experience			11	
Organisation - related		3		
Organizational support			1	
Organisational identification			1	
Recruitment, selection			1	
Country - related		11		
Host country environment			2	
Cross-cultural training			9	
In-country adjustment	323			
Individual-related		148		
Demographics			13	
Female				4
Men vs. women				8
Age				1
Personal Characteristics			100	
Social capital				2
Acculturation/adaptation strategy				10
Person-environment fit				5
Host language proficiency				11
Cross-cultural competencies				2
Work-life balance, well-being				3
Emotional intelligence				6
Cultural intelligence				18
Personal qualities, identity				29
Focus, goal, motivation				14
Work-related characteristics			14	
Psychological contract				3
Organisational commitment				3
Organisational embeddedness				1
Job satisfaction				3
Career capital				4
Family-spouse adjustment			21	
Family-related issues				3
Host country language proficiency				1
Host country nationals				2

The second cohort, migrants, was represented in 33 articles. Among these, the term "immigrant" was predominantly utilised in 20 articles to define the focus group of their research. Four articles specifically focussed on migrant workers, while nine underscored the high skills or qualifications of the migrants in their respective samples. Moreover, research on adjustment primarily concentrated on adjusting IEs to the host country, with no studies additionally analysing the reciprocal adjustment of locals to the cultural changes introduced by IEs.

To summarise, most adjustment research focuses on expatriates, particularly assigned expatriates, with a notable increase in articles over the years. Conversely, studies on all other groups have remained consistent, albeit low, levels. Furthermore, adjustment was predominantly explored unilaterally through the lens of IEs.

Adjustment terminology used. The terms adjustment, acculturation, assimilation, integration, and adaptation have been used to describe IEs' successful settling in a new host country, new job, or community. Figure 5 shows the adjustment terms used in the scientific literature concerning a specific type of IE.

Assimilation is the least utilised term in the literature on IE adjustment, appearing in only two articles. Acculturation, integration, and adaptation were employed more frequently, with 13, 12, and 23 articles, respectively. However, the usage frequency of these terms pales compared to the predominant use of the term adjustment, which was featured in 174 articles.

Furthermore, we analysed the extent to which multiple terms were employed within individual article abstracts. While most authors consistently used only one term in their articles, a minority of articles (9) utilised four of the five adjustment terms in varying combinations. For instance, as the primary term, adjustment was paired with acculturation (1) and integration (1). Acculturation, as the primary term, was coupled with adjustment (1), assimilation (1), or integration (4). Assimilation, as the primary term, was combined with acculturation (1) and

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Table 1 (continued)

Cultural distance			2
Organisational/social support			8
Coping strategies			4
Personality traits			1
Organisation - related	95		
Job-Related		16	
Role clarity, discretion			5
Length of assignment			1
Job position, wage			3
Organizational justice			1
Person-organization fit			2
Workplace learning			4
Human Resource Strategy and Management		36	
HRM practices			5
Organizational support			14
Mentoring/coaching			4
Performance management			2
Leadership			11
Employee Relations		30	
Organisational socialisation			10
Social support networks			5
Host country nationals			10
International teamwork			5
Work environment		13	
Cross-cultural training			2
Organizational culture			6
Logistical help			2
Employer trust			2
Extrinsic motivation			1
Country - related	80		
Networks		24	
Host country nationals			8
Spousal/family support			3
Social support networks			13
Culture		43	
Cross-cultural training			9
Cross-cultural communication			7
Cultural gap, novelty			27
Host Country Environment		13	
Location			2
Hostile environment, terrorism			4
Religion, beliefs, ethnicity			3
Stress, stressors			4
	1522		

integration (2). Notably, the term adaptation was not used concurrently with the other terms. Integration was frequently interchanged with other terms within the same articles (7) (refer to Table 2 for details).

The analysis of bibliometric data also highlights variations in the predominant adjustment terms across different types of international employees. A comparison between expatriates and migrants reveals distinct patterns. Research articles concerning expatriates predominantly utilised the terms adjustment (160 [81.2%]) and adaptation (21 [10.7%]). Conversely, these terms were less prevalent in studies focusing on migrants, accounting for only 14 (42.4%) and 2 (6.1%) instances, respectively. Notably, the term assimilation was exclusively used in studies on migrants

(2 instances), while integration (migrants: 10 [30.3%]; expatriates: 2 [1%]) and acculturation (migrants: 11 [33.3%]; expatriates: 7 [3.6%]) were employed more frequently in research related to migrants compared to expatriates.

Research methods. Table 3 presents the research methods outlined in the abstracts of the articles. These methods were categorised based on the research onion framework proposed by Saunders et al. (2009), distinguishing between methodological choice, time horizon, and strategy. Quantitative research emerged as the most frequently employed methodological choice (124 instances) in IE adjustment research, followed by qualitative research methods (38 instances) and mixed methods (11 instances), with a considerable margin between them. Concerning the time horizon of the research, only 11 articles with a longitudinal design were identified since 1990 in the domain of IE adjustment. Several unique features were observed regarding the research strategy, including case studies (2 instances) and secondary sources (7 instances). Notably, the methodological choice was listed in the abstracts of only 186 (84%) articles.

In summary, quantitative research predominated in both expatriate and migrant groups. However, studies on migrants exhibited a relatively higher proportion of qualitative methods. Additionally, there was slightly more variability in the research methods employed for expatriates than migrants.

Trends in research topics and critical research priorities

Host countries and nationality of participants. Notably, 154 articles specified the country or countries where the research was conducted, while 96 articles indicated the nationality of the participants. Some articles opted to identify regions rather than specific countries (e.g., Asia or Africa) without providing details on the nationalities of the participants, leading to ambiguity regarding the participants' origins and the research locations. The information extracted from the articles was categorised based on the type of international employee (IE) under study, as outlined in Table 4.

Whenever available, the nationalities of the IE samples were classified according to geographic regions defined by the (United Nations 2022): Africa, Asia, Europe, Latin America and the Caribbean, North America, and Oceania. Analysis of the abstracts revealed that the samples predominantly comprised IEs from Asian (42 instances), European (24 instances), and North American (14 instances) origins. Conversely, IEs from Africa (1 instance), Latin America and the Caribbean (3 instances), and Oceania (2 instances) were less frequently examined in terms of adjustment. Among the focal regions, Chinese (17 instances), Japanese (12 instances), and American (12 instances) IEs were the most commonly studied. Notably, the Japanese IE group exclusively consisted of assigned expatriates.

A similar trend is observed concerning the host countries where international employees reside. Based on available data, the majority of research on IE adjustment focused on IEs living in Asia (93 instances), Europe (23 instances), and North America (18 instances), with significantly fewer studies conducted in regions such as Africa (8 instances), Latin America and the Caribbean (4 instances), and Oceania (8 instances). Examining individual countries, the data indicate that China (25 instances), Japan (10 instances), and the United States (13 instances) were the primary host countries for IE adjustment research. Among studies focusing on Japan or China as host countries, the articles predominantly referred to expatriates, particularly assigned expatriates (84% and 70%, respectively), rather than migrants.
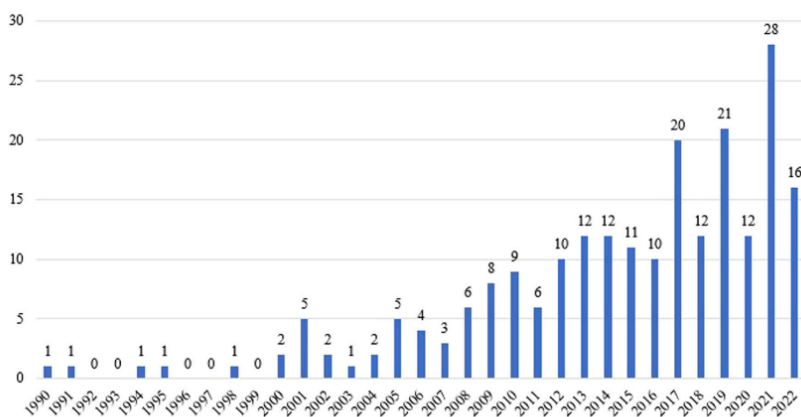
Fig. 3 Number of articles on IE adjustment published per year, 1990–2022.
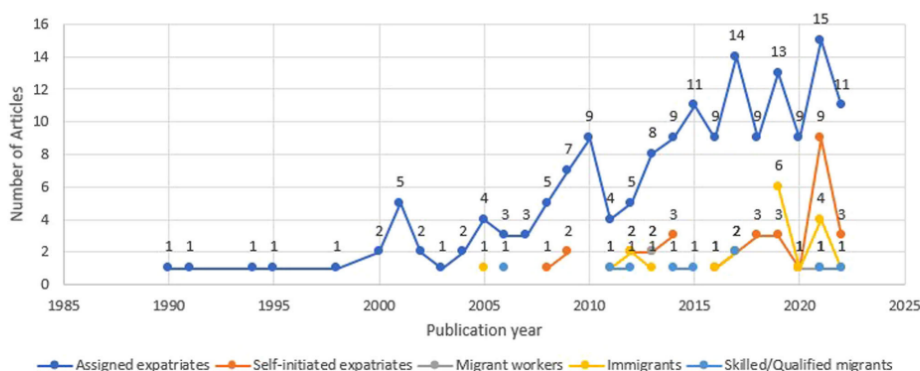

Fig. 4 Use of the different IE types to name the samples per year.

Overall, the findings suggest that regions such as Africa, Latin America, the Caribbean, and Oceania, along with their nationals, were significantly underrepresented in research on IE adjustment.

Anticipatory adjustment of IEs. Anticipatory adjustment, comprising 34 studies, was most frequently examined in association with assigned expatriates (23 studies) (refer to Table 5). Anticipatory adjustment was not a significant focus in studies involving migrant IE groups (4 studies). The two primary factors explored concerning anticipatory adjustment were cross-cultural training to prepare assigned expatriates for their new roles during foreign assignments (9 studies) and previous international experience (11 studies, of which eight referred to assigned expatriates). Other factors, such as language proficiency, motivation to migrate, pre-departure expectations, organisational support and identification, recruitment/selection, and the host country environment, were only explored in limited studies.

In-country adjustment of IEs. Many studies have dealt with adjustment in the host country, which was named 238 times. Factors/antecedents were grouped into individual-, organisation- and country-related groups (refer to Table 6). Individual factors were researched most frequently (155), followed by organisational (95) and country-related (78) factors.

Out of *individual* factors, demographics such as gender and age were explored in 14 articles related to the expatriate group. Personal characteristics, including cultural competence, personality traits, and networks, were the most extensively researched aspect, with 105 studies dedicated to this area. Most of this research targeted assigned expatriates (79 studies), with relatively fewer studies focusing on SIEs and the broader migrant group (14 and 12 studies, respectively). Additionally, there were 22 articles focusing on spouse/family adjustment, examining how family dynamics impacted IE adjustment and considering factors such as support networks, personality traits, host country nationals, and language proficiency. Most of these articles (20 out of 22) were related to assigned expatriates. Individual work-related
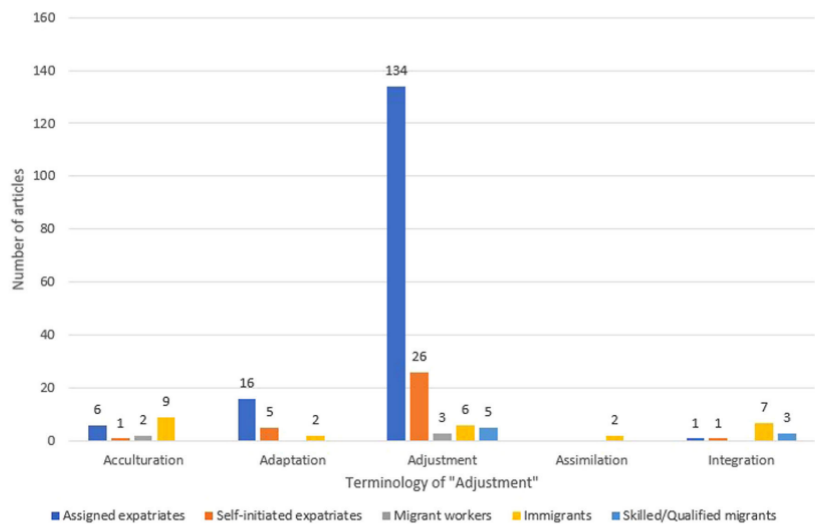
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Fig. 5 Use of terminology around "adjustment" according to IE types.

Table 2 The terminology of "adjustment" is used within the same articles.

Main term \ Alternative term	Acculturation	Adaptation	Adjustment	Assimilation	Integration
Acculturation			1	1	4
Adaptation					
Adjustment	1				1
Assimilation	1				2
Integration	4		1	2	

characteristics, such as organisational commitment, embeddedness, and job satisfaction, were also investigated in 14 studies, with all but two articles referencing the expatriate group.

Regarding *organisational* factors, particular attention was given to two areas: human resource strategy and management (including leadership, performance management, and organisational support), which were the focus of 35 studies, and employee relations (such as international teamwork, social support networks, and organisational socialisation), which were explored in 30 studies. Additionally, there were studies examining job-related factors (such as role clarity and workplace learning) and the role of the work environment in adjustment (including organisational culture and extrinsic motivation). Most of these articles primarily focused on assigned expatriates, with four-fifths of the articles on HR strategy and management related to this group.

Finally, concerning *country-related factors*, studies focused mainly on culture (cross-cultural training, cross-cultural communication, and cultural gap, novelty) (43), as well as networks (social support networks, spousal/family support, and host country nationals) (21) and the impact of the host country environment (culture, safety, location, leisure time, etc.) (14) on IE adjustment. Like the previously analysed groups, country-related factors influencing adjustment primarily concentrated on assigned expatriates (59 studies), potentially limiting the generalisation of adjustment patterns to other types of IEs.

In summary, individual, organisational, and country-related factors were predominantly examined through the lens of assigned expatriates. Regarding the distribution of topics by IE type, the analysis revealed that studies on assigned expatriates (49.8%) and SIEs (50%) primarily focused on individual

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Table 3 Research methods in association with IE types.

Research methods	Expatriates		Migrants			Total
	Assigned expatriates	Self-initiated expatriates	Migrant workers	Immigrants	Skilled/Qualified migrants	
Methodological choice						
Quantitative	92	18	2	9	3	124
Qualitative	21	8		5	4	38
Mixed methods	10	1				11
Strategy						
Case study	1	1				2
Secondary sources	5			2		7
Time horizon						
Longitudinal	7	2			2	11

factors. In contrast, most studies on the migrant group emphasised organisational antecedents (40.8%). Country-related factors received comparatively less attention across all IE types, with 24.5% of studies on assigned expatriates, 15.8% on SIEs, and 26.5% on the migrant group exploring these aspects.

Discussion

By employing a hybrid analysis, which integrates partial biblio-metric analysis and abstract content analysis of scientific articles published between 1990 and 2022, we accomplished two of our objectives: (1) furnishing comprehensive insights into the evolution of the field over time, and (2) identifying trends in research topics to grasp research priorities and essential research areas. In the subsequent sections, we will delve into our third objective, (3) uncovering research gaps that warrant attention in future research. Table 7 outlines the principal findings and a proposed research agenda, which we will elucidate below.

Research agenda. General information about the field progression over time indicates that the number of articles per year increased consistently, indicating that the field of IEs adjustment is of rising interest to management and business researchers. Nevertheless, as shown in the following, abstract content analysis of IE adjustment revealed several under-researched avenues for future research.

IE type. This analysis underscores a notable emphasis on expatriates in IE adjustment research, particularly assigned expatriates, which constituted approximately 72% of all articles. Conversely, other types of IEs remain relatively underexplored, aligning with previous research highlighting the dearth of scholarly attention on international career transitions for self-initiated IEs (Hajro et al. 2021; Yijälä et al. 2012; Zikic et al. 2010). Given the likelihood of SIEs and migrants receiving less or no support from their employers during relocation and in the host country, they may encounter distinct and potentially heightened

adjustment challenges (Brewster et al. 2017). Given the escalating global prevalence of SIEs (Collings et al. 2010), the limited coverage of 32 articles on the adjustment of this specific group underscores a critical need for further research.

Moreover, standardising terminology for IE types could enhance the development of adjustment research and improve precision. Notably, the term "immigrant" lacks a robust definition compared to terms like "assigned expatriate," "self-initiated expatriate," or "skilled migrant." Consequently, the ambiguity surrounding the delineation of these groups hampers the comparability of research findings. Future studies would benefit from clearly describing the characteristics of the group(s) under investigation, regardless of the label used. Additionally, given the varied definitions of IEs, more comparative research across two or more IE types is warranted to ascertain whether and how they adjust differently to host country circumstances and the underlying reasons.

Finally, regarding sample perspectives, all studies in the corpus exclusively focused on the adjustment of IEs, who typically represent a minority in the host country, to a foreign culture. However, the adjustment of locals to newcomers and the influences they bring from their home countries, which may affect various aspects of local life, warrant a more thorough examination in future research.

Adjustment Terms. As 76% of articles used the term 'adjustment,' it might be concluded that this term is the most acceptable for scientists to use in conjunction with IE adjustment. Adaptation (22) was mainly used in connection with expatriates (91%) and – as the only term – and not along with other terms. Interestingly, many publications on adaptation (totalling 19) primarily focused on cross-cultural processes. Although these adaptation studies explicitly employed "adaptation" in their abstracts, they frequently cited sources with synonymous terms in their full text. For instance, three adaptation studies directly referenced acculturation literature sources (e.g., Berry et al. 1988) in the complete text, avoiding the explicit use of "acculturation."

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Table 4 Host countries and nationality of participants.

World Region	Code System	Expatriates		Migrants			Total
		Assigned expatriates	Self-initiated expatriates	Migrant workers	Immigrants	Skilled/Qualified migrants	
	Host countries						
Africa (8)	Africa (country not specified)	2					2
	Ghana	2					2
	Nigeria	4					4
Asia (93)	Asia (country not specified)	1					1
	Bangladesh	1					1
	China	21	4				25
	Hong Kong	7	1				8
	India	7					7
	Japan	7	3				10
	Macau	1					1
	Malaysia	8	1				9
	Middle East			1			1
	Pakistan	4					4
	Singapore	3					3
	South Korea	4	3	1			8
	Taiwan	4		1	1	1	7
	UAE	1	4				5
	Vietnam	2	1				3
Europe (23)	Austria	1					1
	Denmark		1				1
	France	1				1	2
	Germany	2	1				3
	Ireland	1	2				3
	Italy				1		1
	Spain	1					1
	Sweden				4		4
	Switzerland	1				1	2
	UK	3	2				5
Latin America and the Caribbean (4)	Brazil	2	1				3
	Cuba	1					1
North America	Canada		1		3	1	5
	USA	10			3		13
Oceania (8)	Australia	1			4	1	6
	New Zealand					2	2
Total		103	25	3	16	7	154

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Table 4 (continued)

	Nationality/ethnicity of participants						
Africa (1)	Cameroonians				1		1
Asia (46)	Assyrians				1		1
	Chinese	10	1	1	3	2	17
	Filipinos				2		2
	Israelis	1	1				2
	Japanese	12					12
	Lebanese				1		1
	Malaysians		1				1
	South Koreans		2				2
	Palestinians	1	1				2
	Taiwanese	4					4
	Vietnamese			1	1		2
Europe (20)	British	1				3	4
	Dutch	1					1
	Finns	1	1				2
	French	2					2
	Germans	4			1		5
	Italians	1					1
	Poles	1					1
	Portuguese		2				2
	Spaniards	1					1
	Swedes				1		1
Latin America and the Caribbean (3)	Brazilians	1					1
	Mexicans				2		2
North America	Americans	11			1		12
	Canadians	1	1				2
Oceania (2)	Australians	2					2
Mixed (10)	Soviets					2	2
	Westerners	8					8
Total		63	10	2	14	7	96

Similarly, seven adaptation articles drew on references from the adjustment literature (J. S. Black and Stephens 1989; Lazarova et al. 2010) as the theoretical foundation for their adaptation research, without employing the term "adjustment" in the full text. In nine articles, the terms "adaptation" and "adjustment" were used interchangeably within the full text (Jyoti and Kour, 2017; Zhang et al. 2021). Given that conventional literature searches involve seeking relevant texts in databases based on titles, abstracts, and keywords, there exists a risk of parallel development between adaptation research and other adjustment research despite their overlapping content. Thus, future adaptation research should aim to demonstrate the scientific value of the terminological distinction between adaptation and other forms of adjustment. If this distinction is justified, it is crucial to clearly define and delineate these terms or refer to synonymous adjustment terms through cross-references in abstracts or keywords.

Moreover, the bibliometric analysis unveiled variations in dominant adjustment terms across different IE types. When comparing expatriates and migrants, research articles on expatriates predominantly employed the terms "adjustment" and "adaptation," these terms were notably less utilised for the migrant groups. However, from a content perspective, both terms are equally pertinent and applicable to both groups. This underscores the need for a comprehensive assessment of literature covering both expatriate and migrant IE types, emphasising the importance of scientific exchange between these two research streams in the future.

Research Methods. The limited range of research methods employed in the study is noteworthy. Of the abstracts analysed, 124 indicated quantitative research methods, whereas 38 indicated qualitative methods. Interestingly, while quantitative methods were used across expatriate and migrant groups,

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Table 5 Anticipatory adjustment of IEs.

Anticipatory adjustment	Expatriates		Migrants			Total
	Assigned expatriates	Self-initiated expatriates	Migrant workers	Immigrants	Skilled/Qualified migrants	
Individual-related (20)						
Language proficiency	1					1
Motivation to migrate	1	2			1	4
Pre-departure expectations	2	1			1	4
International experience	8	2		1		11
Organization-related (3)						
Organizational support		1				1
Organisational identification		1				1
Recruitment, selection	1					1
Country-related (11)						
Host country environment	1				1	2
Cross-cultural training	9					9
Total	23	7	0	1	3	34

qualitative research methods were comparatively more prevalent in studies focusing on migrant groups, albeit in smaller numbers overall. Existing research offers tentative explanations for adjustment; however, adjustment theory remains in a nascent stage, as evidenced by recent efforts at scale redevelopment (Hippler et al. 2014), the varied terminology used (Harrison et al. 2004), and calls for more significant consideration of context (Szabó 2022). Therefore, adjustment theory is currently classified as an intermediate theory. Although research questions permit the formulation of testable hypotheses, the adjustment construct remains preliminary. To achieve methodological congruence, a hybrid approach combining quantitative and qualitative methods is recommended (Edmondson and McManus 2007). Quantitative research enables testing associations between variables, while qualitative research facilitates elaboration on phenomena, explanations, and illumination of adjustment constructs and relationships. Incorporating more qualitative research would provide deeper insights into the individual experiences of IEs, given that expatriation/migration is inherently unique. Furthermore, latent class analyses could offer a person-centred perspective on adjustment, exploring different adjustment strategies individuals adopt and their characteristics and antecedents (Morris et al. 2015).

The chosen time horizon also reveals explicit limitations in current research practices. Only 5% of the articles indicated the use of a longitudinal design. Given that adjustment is a dynamic process (Banai, 2022; Hippler et al. 2015), the field could benefit from more longitudinal studies to understand its temporal development, success factors, and obstacles. A broader range of research methods is desirable to address diverse research questions (Sam and Ward 2021). Particularly in research on migrants' adjustment, future studies should strive for more significant methodological variance, as differences in IE types do not inherently dictate differences in research methodology.

Countries of Destination and Sample Nationalities. IEs relocating to and originating from Asia, Europe, and North America were the most researched groups in studies related to IE adjustment. Compared to the absolute number of migrants, which is highest in the *destination regions* of Europe (87 million), Asia (86 million), and North America (59 million) (IOM UN Migration 2022), the host countries in the articles on which the analyses are based reflected the distribution well. Conversely, an analysis of the *increase* in migration flows from 2000 to 2020 shows that the regions Asia (+37 million), Europe (+30 million), North America (+18 million), and Africa (+10 million) (IOM UN Migration, 2022) are of the highest relevance. However, the fewest adjustment studies have been conducted in the regions of Africa, as well as Latin America, the Caribbean, and Oceania so far. In particular, the hitherto scarcely explored region of Africa, characterised by a high proportion of migration flow within the region and not across regions as applies to other regions (IOM UN Migration 2022), assumes great significance for future adjustment research. Many scholars posit that adjusting to a host culture that is culturally very different proves more difficult for IEs (Li et al. 2013; Varela and Gatlin-Watts, 2014). However, Selmer (2007) presents evidence suggesting that adjusting to a similar host culture can be as challenging as adjusting to a different one. Consequently, there should be a focus on the nuances of intra-regional migration and adjustment, particularly in Africa.

Based on the information in the article abstracts, the most extensively researched destination countries for IEs were the United States, China, and Japan. Despite the United States being the primary destination for international migrants since 1970

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Table 6 In-country adjustment of IEs.

In-country adjustment	Expatriates		Migrants			Total
	Assigned expatriates	Self-initiated expatriates	Migrant workers	Immigrants	Skilled/Qualified migrants	
Individual-related (155)	(120)	(19)	(2)	(9)	(5)	
Demographics (14)						
Female	4					4
Men vs. women	7	2				9
Age	1					1
Personal Characteristics (105)						
Social capital	2					2
Acculturation/adaptation strategy	5	1	1	4		11
Person-environment fit	4	1				5
Host language proficiency	9	2		1	1	13
Cross-cultural competencies	2					2
Work-life balance, well-being	1	1		1		3
Emotional intelligence	6	1				7
Cultural intelligence	16	1			1	18
Personality traits, identity	25	4		1		30
Focus, goal, motivation	9	3	1	1		14
Work-related characteristics (14)						
Psychological contract	2	1				3
Organisational commitment	1	1		1		3
Organisational embeddedness	1					1
Job satisfaction	3					3
Career capital	2	1			1	4
Family/spouse adjustment (22)						
Family-related issues	3					3
Host country language proficiency	1				1	2
Host country nationals	2					2
Cultural distance	2					2
Organisational/social support	7				1	8
Coping strategies	4					4
Personality traits	1					1
Organization-related (95)	(62)	(13)	(5)	(14)	(1)	
Job-related (16)						
Role clarity, discretion	4	1				5
Length of assignment	1					1
Job position, wage	3					3
Organizational justice	1					1
Person-organization fit		1		1		2
Workplace learning	1	1	1	1		4

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Table 6 (continued)

Human Resource Strategy and Management (35)						
HRM practices	3	1		1		5
Organizational support	14					14
Mentoring/coaching	3			1		4
Performance management	2					2
Leadership	6	1		3		10
Employee Relations (30)						
Organisational socialisation	5	2	1	2		10
Social support networks	3	1		1		5
Host country nationals	9	1				10
International teamwork	2		1	2		5
Work environment (14)						
Cross-cultural training	1	1				2
Organizational culture	3	1		2		6
Logistical help	1	1			1	3
Employer trust		1	1			2
Extrinsic motivation			1			1
Country-related (78)	(59)	(6)	(2)	(9)	(2)	
Networks (21)						
Host country nationals	4	1		2		7
Spousal/family support	3					3
Social support networks	7			3	1	11
Culture (43)						
Cross-cultural training	9	1				10
Cross-cultural communication	6			1		7
Cultural gap, novelty	20	2	2	2		26
Host Country Environment (14)						
Location	2					2
Hostile environment, terrorism	3			1		4
Religion, beliefs, ethnicity	1	1			1	3
Stress, stressors	4	1				5
Total code usage instances	241	38	9	32	8	328

(IOM UN Migration 2022), Germany, the second top destination for migrants (IOM UN Migration, 2022), was notably underrepresented in the corpus, with only three articles. Similarly, countries like Saudi Arabia (0), Russia (0), the UAE (5), the United Kingdom (5), and France (2) which rank among the countries with the highest migrant populations globally (IOM UN Migration 2022; UN DESA, 2022), were also underrepresented in adjustment studies. Furthermore, according to the OECD (2017), Switzerland, Australia, and New Zealand have foreign-born individuals comprising over 20% of their total employment. Nevertheless, research articles on IE adjustment in these destination countries numbered only 2, 6, and 2, respectively. Although Asia is witnessing significant growth in migrants, the proportion of international migrants in the population remains relatively low (1.8%; IOM UN Migration, 2022). Historically regarded as a highly homogeneous society with limited global mobility (Andresen et al. 2020; Sugimoto, 2014), Japan was unexpectedly one of the most studied destination countries for IE

adjustment, highlighting the relevance of research in exploring adjustment dynamics in such unique contexts.

Concerning *nationality*, data indicates that over 40 per cent of all international migrants globally in 2020 hailed from Asia, predominantly from countries like India, China, Bangladesh, Pakistan, the Philippines, and Afghanistan (IOM UN Migration 2022). Mexico and Russia are among the largest emigration countries worldwide (UN DESA, 2022). However, these regions were scarcely represented in the nationalities studied in the adjustment articles analysed. Despite numerous studies focusing on Chinese IEs (17), other countries were either underrepresented (e.g., the Philippines, 2) or not represented at all (e.g., India, Bangladesh, Pakistan, Afghanistan) in the sampled articles.

Moreover, it is noteworthy that three of the ten GLOBE cultural clusters (House et al. 2004) accounted for approximately four-fifths of the destination countries (Confucian Asia, Southern Asia, Anglo) and nationalities (Confucian Asia, Latin Europe, Anglo) studied, with studies based on samples from other cultural

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Table 7 Findings of the study and future research agenda.

The goal of the study		Findings	Research agenda
To provide general information about field progression over time, types of IEs being researched, general adjustment topics, terminology of "adjustment," and research methods	Progression of the field over time	1. Up until 1999, a random single article every few years 2. 2000–2016, the number of articles grows from 2 to 12 per year 3. Since 2017, the number of articles has grown by 20 or more per year, but not each year	Based on the growth patterns, the IEs adjustment field still holds researchers' interest
	Types of IEs being researched	1. 86% of articles are associated with expatriates: 72% with assigned expatriates and 14% with self-initiated expatriates. 14% of all reviewed articles focus on migrants: 1% migrant workers, 9% immigrants, and 4% skilled/qualified migrants 2. The predominant adjustment terms differ between IE types. In expatriate research, the terms adjustment (160) and adaptation (21) predominate, while these two terms are hardly used for the migrant groups (14 and 2, respectively). In migration research, the terms integration and acculturation are used more often than in expatriation research.	1. As assigned expatriates relate to their sending organisations and receive "official" support during their assignment abroad, all other types of IEs might experience different adjustment challenges. As these IE types are much less researched, focusing on adjustment research on self-initiated expatriates and migrants is beneficial to advance our knowledge in this field. 2. The distinction between the IE types "immigrant," "assigned expatriate," "self-initiated expatriate," and "skilled migrant" is not clear-cut in the literature. Consequently, the delimitation of the types and, thus, the comparability of the research results could be more precise. Since there are different definitions of IEs, more research is needed comparing two or more IE types to determine how/if they adapt differently to the exact circumstances in the host country.
	Terminology of 'adjustment' usage	1. 76% of all articles use the term 'adjustment' 2. 4% of articles use more than one term	The term 'adjustment' is the most accepted by researchers in association with IE adjustment. 1. The research on adaptation does not cross-reference the literature on adjustment, integration, acculturation, or assimilation in the title, abstract, or keywords. Cross-referencing in future research would encourage more systematic comparison and integration of research findings. 2. Future research should either show the scientific added value of the terminological distinction between adaptation and other kinds of adjustment and – if this is given – clearly define and delimit the terms or refer to synonymous adjustment terms via a cross-reference in abstract or keywords.
	The research methods	1. 64% of abstracts indicate quantitative methods usage 2. 20% of abstracts indicate qualitative methods used 3. 6% of abstracts note longitudinal study	1. The field would benefit from deeper insight if more qualitative research methods were used to establish methodological fit. A combination of qualitative and quantitative research (hybrid approach) should align with the intermediate state of adjustment theory. 2. Adjustment being a dynamic process, the field would benefit from more longitudinal research.
The trends of research topics and critical research priorities	Countries where research is performed and the nationality of participants	1. The regions of Asia, Europe, and North America are the most frequently represented, and the regions of Africa, Latin America, the Caribbean, and Oceania are the least studied in adjustment research, both as host countries and in terms of nationality of IEs. 2. China, the US, and Japan are the leading host countries for IE adjustment research. 3. Studies on adjustment in Japan and China as host countries concentrate mainly on assigned expatriates. 4. Previous research on adjustment focuses on the adjustment of IEs to the host country. None of the studies additionally analyses the adjustment of locals (i.e., the majority) to the cultural innovations introduced by IEs.	1. Examining destination countries where IEs reside, and their respective nationalities through purposeful sampling could yield valuable insights into adjustment dynamics. For instance, comparing the adjustment experiences of Russians and Germans in the Baltic states could shed light on how historical events have shaped local perceptions towards different nationalities. Given that individual characteristics and the socio-cultural environment of the host country are integral to adjustment processes, stakeholders involved with IEs stand to gain from systematic research conducted within specific combinations of countries of origin/nationalities and destination countries. Such targeted investigations would offer nuanced understandings of the adjustment challenges and facilitate more tailored support mechanisms for IEs. 2. Several countries that have a high proportion of foreign-born workers in their workforce (such as Switzerland, Australia, and New Zealand) or have experienced a large influx of migrants in recent years (see, for example, Germany or the high intraregional migration within Africa) are (almost) not studied by researchers in the field of IE adjustment. A focus on countries with a high proportion of migrants in the population and a large influx of migrants would allow for the identification of facilitating factors. According to this logic, the African region should be more strongly represented in adjustment research. 3. Exploring nationalities and countries with low international mobility allows for a broader identification of conditions (e.g., personal initiative, openness for experience at a country level) for success and obstacles. The region of Africa has the highest share of intraregional migration in the world. The specifics of intraregional migration and adjustment should be focused on in the region of Africa. 4. Research postulates that adjusting to similar cultures is at least as challenging as adjusting to foreign cultures. Comparing the intraregional migration of different regions should examine how this rule can be generalised or why this is different. 5. Future research should additionally (1) focus on the adjustment of local individuals to IEs (bilateral adjustment) and (2) on possible differences in this adjustment of local individuals depending on their nationality (which may differ from the country of residence), own international mobility experience, and share within the population of the host country. 6. Adjustment studies should investigate underrepresented GLOBE cultural clusters, such as the Middle East, Sub-Saharan Africa, Latin

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Table 7 (continued)

The goal of the study		Findings	Research agenda
			America, and Eastern Europe, concerning host countries and nationalities. This exploration would help understand how cultural disparities affect IEs' ability to achieve positive adjustment outcomes. Furthermore, analysing the relationship between cultural appeal and adjustment could reveal differences in the difficulty of adjustment across various nationality-destination combinations. 7. As international mobility patterns shift due to economic or political changes, researchers should examine IE adjustment in historically significant migrant-sending countries like Eastern Europe. This exploration would provide insights into the challenges faced by host countries, including their readiness to accommodate IEs and the adaptation of local individuals to changing demographic landscapes. 8. With regard to nationality, existing IE adjustment studies inadequately represent the nationalities of over 40 per cent of all international migrants worldwide, notably those from Asia. Notably, individuals from countries such as the Philippines, India, Bangladesh, Pakistan, and Afghanistan are absent from the samples.
	Anticipatory adjustment	1. 68% of articles study anticipatory adjustment mainly concerning assigned expatriates. 2. 12% of studies analyse migrants' anticipatory adjustment.	1. The other types of IEs than assigned expatriates presumably also plan and investigate their expatriation before the actual move. Therefore, research on these groups' anticipatory adjustment would greatly benefit receiving countries and organisations.
	In-country adjustment	1. Most studies focus on assigned expatriates' in-country adjustment. 2. Studies focus on individual, organisational, and country-related factors influencing in-country adjustment. 3. Individual-related factors include demographics, personal characteristics, work-related characteristics, and family/spouse adjustment. 4. Organisation-related factors include work environment, employee relations, human resource strategy and management, and job. 5. Country-related factors include the host country's environment and networks.	1. Future studies should simultaneously research if and how an antecedent affects different elements of IE adjustment: organisational and individual, organisational and country, individual and country, etc., as some of the antecedents are likely to be related to different settings simultaneously. 2. Individual-related factors: Demographics is used in most statistical data but is limited to age and female/male IEs. Research is needed on the effect of IEs and /or the host country's demographics on IE adjustment. Studies on gender differences in adjustment require expansion to include transgender and other genders to be representative of the population. 3. Organisation-related factors: while entering a host country's labour force, the relationship with the direct supervisor (who, among other duties, is also responsible for human resource strategy implementation within the company) regarding IEs adjustment to the local workplace needs to be researched more extensively. The effect of work environment (such as organisational culture type, working conditions, etc.) on IEs adjustment is under-researched and would benefit from more studies. 4. The COVID-19 pandemic changed workplace settings from in-person to remote; therefore, the IE adjustment needs new research regarding new circumstances.

clusters such as the Middle East, Sub-Saharan Africa, Latin America, or Eastern Europe being the exception. Future research should systematically examine the combination of nationality and host country to understand the impact of cultural attractiveness on adjustment. While cultural distance measures highlight challenges and losses from cross-cultural interaction, cultural attractiveness focuses on the potential gains from such interaction, even in culturally disparate contexts (Li et al. 2017). IEs from countries who perceive the cultural practices of their host country as more valuable than their own may feel attracted to the host country's cultural practices, which could positively impact their adjustment (Li et al. 2017).

To summarise, data accessibility rather than content criteria may have primarily influenced the selection of nationalities and destination countries/regions in previous research. While focusing on countries with high migrant populations and significant migrant inflows may help identify facilitating factors, expanding the scope to include countries with different conditions can help identify equally important barriers. For instance, in countries with few IEs, more personal initiative is required for adjustment, as there are fewer fellow IEs to provide support, and interactions with the native population may be less familiar (Andresen et al. 2020). Given that adjustment processes are influenced by social systems that create inequities across individuals and groups, future research should systematically consider the social conditions in different cultures and how these inequities affect IEs' ability to achieve positive outcomes (Szabó 2022). This necessitates a more deliberate sampling approach for destination

countries/regions and the nationality of IEs, including "exceptional" destinations and nationalities, and examining the combination of nationality and host country attractiveness in future studies.

Research Themes. Most studies on anticipatory adjustment (68%) focused on assigned expatriates, which is understandable given their affiliation with the same company. Assigned expatriates typically receive support from their organisation before their assignment, facilitating their anticipatory adjustment. However, it is worth noting that all other types of international employees also engage in planning before relocating to another country. Therefore, they will likely undergo some form of individual anticipatory adjustment that could impact their adjustment abroad. Despite this, only seven articles explored the anticipatory adjustment of SIEs, and four studies examined the migrant group. Since SIEs and other migrants typically do not receive financial support from their employers for relocation, studying their anticipatory adjustment could benefit both receiving companies and countries. Hence, there is a need for more research on the anticipatory adjustment of all types of international employees beyond assigned expatriates.

Antecedents of in-country adjustment for international employees were categorised into individual, organisational, and country-level factors. However, some antecedents, such as networks, host country nationals, host country language proficiency, or person-organisation fit, could be attributed to multiple levels depending on the researcher's perspective. For example,

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social support networks may not solely be "work-related" at work, even within the workplace environment. Individuals often form close networks with co-workers from various departments based on non-work-related factors like shared interests. Therefore, the impact of these adjustment antecedents on international employee adjustment may extend beyond the organisational level. This highlights the need for research that examines antecedents affecting multiple levels (individual, organisation, country) and stages of international employee adjustment.

Only 14 articles investigated how demographics might affect international employee adjustment; one emphasised the age of international employees, and 13 examined gender (with four focusing on women and seven comparing men with women). It is important to note that no articles addressed adjustment related to transgender or other genders. The lack of understanding regarding how international employees' demographics or the host country's environment influence adjustment could lead to poor decision-making and negative consequences for businesses, such as decreased motivation among international employees and disruptions in interactions with customers, suppliers, and colleagues abroad (Olsen and Martins 2009). This highlights the need for more research on the effects of international employees' demographics and the host country's demographics on adjustment.

A phenomenon not previously explored in existing studies is remote adjustment, which refers to the adjustment process experienced by workers with indirect and often temporary intercultural contact with individuals in geographically separated cultures. This indirect contact occurs virtually through the Internet, where IEs build social networks and seek support. Research by Canhilal et al. (2022) indicates that these virtual networks and Internet-based support significantly influence IE adjustment.

The concept of remote adjustment may have been particularly accelerated by the COVID-19 pandemic, which brought about widespread changes in workplaces worldwide, especially in technologically advanced countries. With the shift to online work replacing traditional face-to-face interactions, there has been a surge in virtual assignments and international remote work arrangements. As a result, an increasing number of IEs are navigating adjustment challenges in virtual environments. Given the growing prevalence of virtual work arrangements, exploring the adjustment experiences of virtual IEs, particularly in the context of information technologies, becomes essential in the post-COVID era. Understanding how remote adjustment unfolds and identifying effective strategies for supporting virtual IEs will benefit employers and international employees.

Theoretical contributions. To demonstrate the significance of this hybrid review in enriching the adjustment literature, we refer to Mukherjee et al. (2022) systematisation for delineating the critical pathways to making theoretical contributions. Within theoretical contributions (as outlined by Whetten, 1989), our examination reveals that prevailing adjustment research predominantly addresses fundamental theoretical questions. These inquiries encompass defining the adjustment construct, identifying the contributing factors to pre- and post-relocation adjustment phases (the conceptual landscape), delineating the interconnections among these factors (nomological network), and elucidating the underlying causal mechanisms (Mukherjee et al. 2022). Whereby the model of Black et al. (1991) plays a vital role in conceptualising international adjustment as both multifaceted (work and general adjustments together with interactions with host-country nationals) and time-related (anticipatory and in-country adjustments).

A primary theoretical contribution emanating from our analysis is the recognition that while the model proposed by Black et al. (1991) remains prominent, adjustment research also incorporates other theoretical constructs (such as acculturation, integration, and adaptation, albeit infrequently assimilation), which are often used synonymously. Consequently, regarding construct definition, a pressing need exists for either consolidation or precise demarcation of these constructs. A comprehensive comparison of literature concerning expatriates and migrants, as detailed in the research agenda mentioned earlier, holds promise for theoretically refining the conceptual landscape, nomological network, and causal mechanisms (Mukherjee et al. 2022).

Secondly, by delineating knowledge clusters or primary themes in adjustment research (Mukherjee et al. 2022), our analysis underscores the underexplored boundaries of adjustment theory, particularly temporal and contextual factors. These boundary conditions encompass discerning variances in adjustment predicated on the identity of the individuals undergoing adjustment (types of IEs, locals), the geographical locations involved (countries of origin and destination), and the timing of adjustment (anticipatory and in-country phases). Studies on expatriation and migration have explored distinct boundary conditions, but the findings need to be synthesised to inform future research on adjustment. Statistical data has revealed that the sampled populations are not fully representative, highlighting some research gaps that must be addressed. It is essential to compare the findings in the context of the "where" boundary condition to understand the topic better.

Thirdly, our systematic analysis underscores elevated researcher interest despite the increasing productivity in IE adjustment research over time by tracing evolutionary nuances to understand the trajectory of adjustment research (Mukherjee et al. 2022). However, a notable trend emerges wherein most research has predominantly focused on assigned expatriates, with all other IE categories receiving considerably less scholarly attention. This discrepancy highlights the imperative for a more equitable distribution of research focus across diverse IE cohorts to foster a comprehensive understanding of adjustment phenomena.

The fourth theoretical contribution centres on identifying significant knowledge gaps within adjustment research. Addressing these gaps necessitates a heightened focus on several areas in future studies. Specifically, increased attention should be given to anticipatory adjustment, particularly for migrants but encompassing all types of IEs. Additionally, there should be a more concentrated examination of in-country adjustment, specifically emphasising migrants and various country-related factors such as the cultural appeal of the home versus the host country, economic considerations, and political dynamics. Expanding the scope to include a broader range of countries of origin and destination, demographic variables, remote adjustment, and locals' attitudes towards IEs' adjustment or even their adjustment to them is essential.

The theoretical insights gleaned from systematic mapping highlight the necessity for future studies to adopt research methodologies that facilitate the evolution of adjustment theory from an intermediate to a mature stage, advocating for a hybrid research approach.

These findings contribute significantly to international human resource management and business, emphasising the need for additional research involving SIEs and migrants. Given the global rise in their numbers, particularly in less-explored countries and adjustment factors, such research has the potential to deepen our comprehension of the adjustment phenomenon.

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Limitations and implications for research. The study is subject to several limitations that warrant acknowledgement. A methodological constraint is inherent in bibliometric analysis, as it primarily involves categorising and organising extensive bibliometric data (Andersen 2019). Although the supplementary content analysis of abstracts in this hybrid review offers additional insights into the state of research, it remains somewhat superficial. Future researchers are encouraged to delve deeper into relevant publications to facilitate a more nuanced differentiation of their research questions based on the research fields identified in this review.

Secondly, a limitation arises from our focus on business and management. The selection of articles inherently reflects a somewhat homogeneous perspective on IE adjustment research, with the organisational context typically foregrounded in these studies. Publications in sociology, economics, or psychology could offer additional insights into IE adjustment, such as those related to the macroeconomic context (sociology, economics) or individual antecedents, such as memory and identity (psychology).

Thirdly, our exploration was confined to the WoS database, inevitably influencing the articles. While it is generally acknowledged that there is a significant overlap in content indexed between WoS and Scopus (Pranckutė 2021), Donthu et al. (2021) advocate for selecting "one appropriate database to mitigate the need for that consolidation" (p. 293) and the associated risks of errors, a search in Scopus or Dimensions databases could have broadened the scope, considering they encompass journals not included in WoS.

Fourthly, our study's search was restricted to English-language articles. Including articles in various languages would introduce research from diverse nations, fostering the exchange of research insights.

Conclusions

Based on a comprehensive review spanning 32 years of theory and research on adjustment, it is evident that studies concerning IE adjustment have seen a remarkable increase over this period. To advance adjustment theory and research further, future research should be deliberate in two key aspects: research design, incorporating purposeful sampling across demographics, types of IE, nationality, and destination countries, and methodological alignment through a hybrid approach that integrates qualitative and quantitative methods; and research focus, involving systematic selection and analysis of host countries alongside their social, political, and technological contexts, comparison of IE adjustment with that of local populations, examination of pre-departure and in-country adjustment among various IE types, and tracking adjustment over time, including remote settings. This proposed research agenda is extensive and essential for progressing intermediate adjustment theory towards maturity.

Data availability

All data generated or analysed during this study are included in this published article [and its supplementary information files].

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Author contributions

Competing interests

The authors declare no competing interests.

Ethical approval

Ethical approval was not required as the study did not involve human participants.

Informed consent

Informed consent was not required as the study did not involve human participants.

Additional information

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Paper 2

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Factors influencing expatriates' adjustment in Estonia and Lithuania

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ABSTRACT

This study draws upon the person-environment (P-E) fit model and the literature on expatriate adjustment to reveal the expatriate adjustment factors in Estonia and Lithuania—two countries that are usually known as expatriate-sending countries. A total of 20 semi-structured interviews were conducted with expatriates in our two case study countries, Estonia and Lithuania. We explored work-related and non-work-related environmental supply and demand of expatriate adjustment. Also, we studied the personal characteristics of expatriate adjustment. The results indicate that the interviewed expatriates felt well-adjusted to their host countries. However, the environmental supply required further development to fulfil expatriates' needs in the studied countries. This study expands the scope and relevance of the adjustment of expatriates in countries usually known as expatriate-sending countries. Additionally, this research extends the use of the P-E fit model in the adjustment context by advancing our knowledge of the interplay between environmental supply and demand.

Introduction

People's mobility is an ever-growing global phenomenon. For example, 8.4% of all European Union (EU) inhabitants were born outside the EU in 2021 (Statistics on migration to Europe, 2022). Moreover, the EU has an internal market for the free movement of people, and it was determined that 12.4% of people previously residing in one EU member state lived in another EU member state in 2020 (Statistics on migration to Europe, 2022). Successful mobility implies adjustment to the receiving country context and, in the case of job mobility- the receiving organisational context (Hippler et al., 2014). The adjustment process can be problematic since expatriates may face various challenges, such as cultural shock, homesickness, language differences, work norms, and other issues in foreign workplaces and societies (Barner-Rasmussen et al., 2014; Black & Gregersen, 1991; Feitosa et al., 2014; Hippler et al., 2014; Mezias & Scandura, 2005; Qin & Baruch, 2010; Rajasekar & Renand, 2013).

Kunst et al. (2023) and Egitim and Akaliyski (2024) noted that acculturation studies mainly focus on the Western, educated, industrialised, rich, and democratic contexts. However, acculturation has been understudied in societies where immigration is still

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considered a new phenomenon, for example, in Japan (Egitim & Akaliyski, 2024).

It has also been observed that international people's mobility flows are distributed differently within the EU. Older EU member states with relatively strong economies (e.g., Germany and France) usually receive the most significant inflows. These countries have experienced multiple waves of immigration due to their colonial past, labour market conditions in the 1960 s, when guest worker policies were implemented to attract temporary workforce from the South of Europe, Turkey and Morocco to sustain their economies, as well as later asylum-seeking immigration (De Coninck & Solano, 2023; Hahamovitch, 2003). In contrast, newer EU countries in Eastern and Southern Europe (including the Baltic states – Estonia, Latvia and Lithuania) that historically do not have a steady track record of immigration have witnessed high emigration (Kumpikaitė-Valiūnienė et al., 2022) resulting in a demographic downturn However, a new migration trend in Estonia and Lithuania must be explored as there has been a recent increase of incoming mobility in the Baltic states. Due to increasing incoming flows, Estonia and Lithuania changed from migrant-sending to migrant-receiving countries. Estonia's positive net migration started in 2015, and Lithuania's began in 2019 (Eurostat—Data Explorer, 2020).

In this article, we focus on the research gap that Egitim and Akaliyski (2024) identified to explore adjustment in societies where immigration is considered a new phenomenon. Therefore, we explore the adjustment of expatriates in Lithuania and Estonia, known as migrant-sending but not receiving countries, where immigration is a new phenomenon. Moreover, these countries are unique as they previously belonged to the USSR, regained their independence in 1990 and joined the EU. The context of ex-USSR republics concerning immigration and adjustment is also strongly understudied.

Migrant-receiving countries, different from migrant-sending countries, require different outlooks regarding many factors affecting the country and its citizens, such as an inflow of people of different origins that may cause cultural and social cohesion issues, as well as provoke fiscal and social strains associated with labour market changes (Kerr & Kerr, 2010). Further, the receiving countries need to consider changes in healthcare settings influenced by differences in perceptions and mental health impact (Edge & Newbold, 2013), preparedness of national and local governance structures and mechanisms to accommodate the integration of immigrants (Østergaard-Nielsen, 2011). Thus, understanding the challenges of expatriate support and adjustment became an essential issue for newly migrant-receiving countries such as Lithuania and Estonia and crucial for policymakers and receiving organisations to support international people's mobility and brain gain.

To explore this phenomenon, we apply the person-environment fit model by Edwards et al. (1998). Looking through the literature for P-E fit model application to expatriates' adjustment in the novel immigrant receiving, homogeneous countries, which at the same time recently overcame change from authoritarian to democratic regime, we see a lack of empirical research that would combine these circumstances. For example, Oh et al. (2014) analysed the P-E fit model through a cross-cultural focus; however, the analysis concentrated on differences between cultures in parts of the world, such as East Asia, Europe, and North America. They pointed out that East Asia culture, different from Euro-American cultures, is based on in-group and institutional collectivism; therefore, the relational fit would be more salient there (Oh et al., 2014). In their study, Nolan and Morley (2014) analysed the relationship between P-E fit and cross-cultural adjustment of self-initiated doctors in Ireland. Even though Ireland, Lithuania, and Estonia have historical and territorial similarities, Ireland gained independence from Great Britain in 1921 and entirely became independent in 1949; therefore, Nolan and Morley's research done in 2014 does not highlight Ireland being a newly independent and immigrant-receiving country. Also, the study was explicitly oriented to public sector self-initiated expatriates consisting of doctors only (Nolan & Morley, 2014). In their study, Van Assche et al. (2014) analysed the outlook of locals towards immigrants in the Netherlands through the P-E fit perspective. Despite the Netherlands being a geographically small country, akin to Lithuania and Estonia, its long-established democracy and enduring economic stability set it apart as did the tradition of immigration due to its colonial past and the policies welcoming guest workers in the 1960 s. Thus, research conducted there operates within entirely different circumstances than in the Baltic countries. Another study conducted by Koveshnikov et al. (2023) also differs in its content. It analysed local language skills and work-related outcomes, drawing on the Person-Job fit theory with a sample of foreign academics working in Finland, Sweden, and Norway.

Taking Estonia and Lithuania as examples of Eastern European countries, small and primarily homogeneous societies, novel as immigrant-receiving countries, which at the same time recently overcame change from authoritarian to democratic regime, we presume that these countries and their organisations still need to prepare to receive and support expatriates. Therefore, *we aim to reveal environmental factors that might influence expatriates' adjustment in these countries, once known as expatriate-sending countries*. To achieve this aim, we formulate research questions while drawing on the person-environment fit theory (Edwards et al., 1998; Haslberger et al., 2014), highlighting environmental importance and the literature on expatriate adjustment (Black et al., 1991; Haslberger et al., 2014; Stoermer et al., 2018) focusing on the supply and demand of work and non-work environments:

RQ1. What work-related adjustment factors linked to environmental supply and demand do expatriates require?
RQ2. What non-work-related adjustment factors related to environmental supply and demand do expatriates reveal?
RQ3. What personal characteristics related to their successful adjustment do expatriates reveal?

In this study, expatriates are defined as skilled and professional individuals who decide to move abroad for employment purposes through self-funding and self-control (self-initiated expatriates) or who are sent by a company from their home country (assigned expatriates) on a temporary international assignment (McNulty & Brewster, 2018; Suutari & Brewster, 1998).

Our study contributes to the literature in several ways. Firstly, it focuses on expatriates' adjustment in countries usually known as migrant-sending but not migrant-receiving countries where immigration is still considered a new phenomenon (Egitim & Akaliyski, 2024). It also expands such studies outside rich Western countries (Kunst et al., 2023) Thus providing novel insights into the expatriate adjustment literature. Secondly, this study extends the application of the P-E fit model in answer to earlier calls (Haslberger et al., 2014). The results of this study highlight environmental supply and demand affecting expatriate adjustment in the work and non-work environments. Our study expands knowledge about adjustment in previously unexplored ex-USSR homogeneous Eastern European

countries recently faced with an immigration phenomenon. These findings encourage further conceptual developments of the P-E fit model to explore need-supply and ability-need fit (Caplan, 1983) in expatriates' adjustment.

Literature review and conceptual background

Person-environment fit theory in expatriation

The expatriate adjustment refers to the degree of fit between an individual and their new environment regarding social processes and structures (Gudykunst & Hammer, 1988). Expatriation moves a person to a new country and its environment, where they attempt to fit in and adjust. Besides the fact that an expatriate is either assigned or self-initiated—and even if the expatriate chooses not to adapt to their new environment—the environment forces the expatriate to adjust to a certain degree as they interact with different country's socio-economic environment and company culture.

In response to why adjustment might be successful for some individuals but not others, Haslberger et al. (2014) used the P-E fit model. Four dimensions describe P-E fit: personal needs, personal abilities, environmental supply, and environmental demand (Caplan, 1987; Haslberger et al., 2014). Personal needs should correspond with environmental supply, and personal abilities should correspond with environmental demand.

van Vianen, (2018) noted that the P-E fit theory assumes that people have an innate need to fit into their environment and seek out environments that match their characteristics. Personal needs could be related to exciting work tasks, affiliation, social support or recognition at the organisational level (Hippler et al., 2014; Stoermer et al., 2018) and factors such as safety and health systems at the country level (Leisyte & Rose, 2016). Environmental supply is related to extrinsic and intrinsic resources provided to meet the needs of an individual, such as food, money, social involvement, and achievement opportunities (Harrison, 1978). Scholars (Isaksen et al., 2001; Oldham & Cummings, 1996; Stokols et al., 2002) have highlighted various environmental aspects, including the physical characteristics of the workplace, organisational structure and policies, job characteristics, organisational culture and climate, all of which could be identified as constituting the supply side of the environment. If the supply fulfils the needs of an individual, the situation could be described as a needs-supply fit (Caplan, 1983).

Another part of the model focuses on demand-ability fit, which depends on the fit between environmental demand and individual abilities (Caplan, 1983). Environmental demand includes quantitative and qualitative job requirements, role expectations, and group and organisational norms. Thus, the environment requires individuals to have specific abilities to meet the environmental demand (e.g., language skills, cultural competencies, and verbal, analytic or social skills) (Caplan, 1983).

Adjustment challenges occur because expatriates feel they need help to fully meet the demands of moving to another country or that aspects of the move do not meet their expected needs (Haslberger et al., 2014; Stoermer et al., 2018). Therefore, the success or failure of expatriates' adjustment depends on the extent to which there is a fit between the individual and their environment in the host country (Stoermer et al., 2018).

Factors influencing the expatriates' adjustment

The uniqueness of expatriate adjustment lies in the fact that in addition to the usual factors involved in adjusting to a new environment, workplace or organisation, expatriates often face cultural differences and language barriers, new socio-economic systems, and different ideologies in a new country, that are thus related to person's culture and abilities as well as characteristics of the new environment (Aycan, 1997; Haslberger et al., 2014; Nolan & Morley, 2014). When describing adjustment after arrival to a new country, Black et al. (1992) highlighted three key variables that affect the adjustment of expatriates: *organisational, contextual, and individual*. In other words, the organisational variable could be called 'work adjustment', and the contextual variable could be referred to as 'general' or 'non-work adjustment' (Black et al., 1992; Haslberger et al., 2014; Kumpikaitė-Valiūnienė et al., 2022).

Work-related environment

The work-related environment encompasses all aspects that affect expatriate's work adjustment. These are work-related demand and supply. Role clarity, role discretion, role novelty, role conflict, organisational culture and its novelty (Andreason, 2003; Pinto et al., 2011), work language and documentation (Kräh et al., 2015; Leisyte & Rose, 2016), all of which can be described as the organisational demands to which employees should adjust based on their abilities. Other organisation-related factors, such as the supply of information, organisational and social support, human resource management (HRM) practices, salary and other employee benefits (Froese, 2012; Hajro et al., 2019; Harrison, 1978; Leisyte & Rose, 2016) are required to satisfy employees' needs and influence expatriates' adjustment.

Non-work-related environment

Numerous factors of non-work-related environment can influence non-work adjustment. Environmental supply to fulfil individual needs at the country level could include health care and security, which Leišytė & Rose (2016) revealed when exploring barriers to academic staff mobility in Central and Eastern European (CEE) countries. Immigration policies (Hajro et al., 2019) and European integration policies in social welfare (Papadopoulos, 2012) bring together a variety of practices and well-established economic, political and interpersonal spaces that link with the host society and facilitate expatriate adjustment.

Around 68–70% of expatriates relocate to foreign countries with their families (Breakthrough to the Future of Global Talent Mobility, 2016); therefore, spousal or family adjustment could also be highlighted as influencing expatriate adjustment (Andreason,

2003; Bhaskar-Shrinivas et al., 2005; Pinto et al., 2012). Factors such as information provision related to spouses and families are part of the non-work-related environment supply that expatriates need to receive in new circumstances. Information regarding housing, local transportation, doctors, schools, grocery stores and so on could potentially reduce uncertainty (Copeland & Griggs, 1985; Haslberger & Brewster, 2008) and facilitate adjustment (Torbiörn, 1982; Weeks et al., 2010). Housing and living conditions in the host country are two other supply factors influencing non-work adjustment. Moreover, visas, work permits, and language requirements are examples of factors that are important to a country-level environmental demand (Leisyte & Rose, 2016).

Further demand factors include cultural distance. By analysing the acculturation models of skilled migrants, Harjo et al. (2019) revealed factors such as cultural distance and the ethnocentrism of the host country. Existing research (Black et al., 1991; Hemmasi & Downes, 2013; Jenkins & Mockaitis, 2010) has demonstrated that the more significant the difference between the culture of the host and home countries, the more complex the international adjustment.

Individual characteristics

Individual characteristics also impact adjustment (Black et al., 1992) and are essential to fit the environment's needs at work and non-work levels (Caplan, 1983; Haslberger et al., 2013). Some scholars (Bhaskar-Shrinivas et al., 2005; Hajro et al., 2019; Pinto et al., 2012) have stressed individual characteristics, such as a person's cross-cultural competence related to previous international experience, host language skills, and personality traits. At the same time, Lazarova et al. (2010) found that last international assignments and other international experiences can facilitate the adjustment of expatriates. Additionally, time spent in a foreign country also helps expatriates adapt to and fit the demands of the host country (Black et al., 1992). Furthermore, Peltokorpi (2008) examined expatriate adjustment in Japan and found that Japanese language proficiency is one of the most critical determinants of non-work-related adjustment.

Methodology

Research design

This study follows a qualitative research design that allows us to understand the challenges faced by expatriates in small, newly migrant-receiving countries. It also helps us better understand which environmental facets are relevant for expatriate adjustment. This corresponds with the suggestion by Hippler et al. (2014) that factors of expatriate adjustment should be determined at the individual level. Our findings are based on data from 20 semi-structured interviews conducted with expatriates in our two case study countries, Estonia and Lithuania.

Case selection

The Baltic States include three small countries: Lithuania (population of nearly 2.8 million), Latvia (1.9 million), and Estonia (1.3 million) (European Commission, 2022). They were independent republics from 1918 to 1939, were then occupied by the USSR, and became a part of it from the end of World War II to the early 1990 s. During this period, the mobility of Baltic State citizens towards the global West was largely restricted. Therefore, they stayed homogeneous (dominating one nation and one religion) and closed societies. After the restoration of independence (1990 for Lithuania, 1991 for Latvia and Estonia), the Baltic states have widely been regarded as emigration countries and have shown low short- and long-term incoming mobility. The Baltic States are the only ones from the fifteen ex-USSR republics that have become members of the EU and NATO in 2004. Lithuania and Latvia led the statistics on emigration from countries within the EU for many years. However, recent positive net migration has only been seen in Estonia (from 2015) and Lithuania (from 2019). Therefore, our study focused only on Estonia and Lithuania, not Latvia.

Despite having a few differences, such as dominant religions - Catholicism in Lithuania and Lutheranism in Estonia - and different native languages (Lithuanian and Estonian, respectively), both countries have many similarities, making them appropriate to be analysed together.

The readiness and ability of a country to integrate new immigrants are among the key factors influencing successful immigration policies and an eventual national brain gain. One possible indicator that can be used to understand this readiness is the Migrant Integration Index, comprised of indicators such as labour market mobility, family reunion, education, health, political participation, anti-discrimination, permanent residence, and access to nationality (Migrant Integration Policy Index, 2020). Countries with higher scores (e.g., Sweden (86), Finland (85), the USA (85), and Australia (73)) are characterised as migrant-receiving and multicultural societies. Estonia scored 50, Lithuania 37, and, for example, Japan - 47 on this index, resulting in these countries being described as having homogeneous societies- 84.2% of the Lithuanian population is Lithuanians, whilst 69.1% of Estonia's population is Estonians.

Looking at socioeconomic characteristics that influence the working and non-working environments foreigners need to adjust to in these countries, we used Hofstede's cultural dimensions (e.g. Kumpikaitė-Valiūnienė et al., 2022). Lithuania and Estonia could be described as Individualist societies, and individualism has risen since independence in 1990. This trend can be attributed to increased national wealth, manifested in reduced dependency on traditional agriculture, the adoption of modern technology, urbanisation, enhanced social mobility, improvements in the educational system, and the growth of the middle class. People are tolerant and do not care too much about what others do as long as it does not directly affect them in Lithuania and Estonia. It means that what people do and how they live their lives is their own business. These nations could be described as direct communicators who speak straightforwardly, avoiding exaggeration and understatement. Performance and results are more important than organisational relations, which could be noted in organisational culture and relations with other people.

Both countries exhibit low scores on power distance; therefore, people prefer equality and decentralisation of power and decision-making. They do not favour hierarchical order, centralisation, or autocratic leadership and do not expect to be told what to do or how to behave. However, the older generation, who experienced Soviet occupation, may have a stronger sense of loyalty towards authority and status.

Moreover, both societies could be described as modest and honest. However, due to the consequences of Soviet occupation, their people still harbour an inherent concern about the world around them and process an inner drive to stay busy and work hard.

Data collection and analysis

For this study, we conducted 20 semi-structured, face-to-face interviews with expatriates living in Lithuania and Estonia. Three authors were interviewers (two in Lithuania and one in Estonia). They had ample experience with conducting interviews and had been involved in research on expatriates' integration into foreign contexts prior to this study. Interviews were conducted according to the principles of scientific inquiry, assuring confidentiality and privacy and allowing interviewees the possibility to withdraw at any stage of the interview or after it.

A study was conducted before the COVID-19 pandemic, and the Ukrainian-Russian war started. A snowball sampling technique was applied to identify and interview expatriates. Information on the interviews and the characteristics of expatriates is provided in Table 1. The interview guidelines were adapted from a study of academic staff mobility in Lithuania, one of the case study countries (Rose & Leisyte, 2017). The questions were adjusted to reflect realities outside of the academic context. Based on our literature review, the interview guidelines were extended to cover the following areas: a) the personal characteristics of the interviewees, b) their experiences of mobility, and c) the challenges of adjustment they have experienced in both work- and non-work-related environments. An overview of interview questions is provided in the Annex.

A total of 20 interviews (10 per country) were conducted and the data collection was stopped when thematic saturation was achieved. This sample size corresponds with the findings of recent literature concerning saturation in qualitative research, especially with narrowly defined research objects (e.g. Hennink & Kaiser, 2022).

As interviewers knew several languages (like English, Russian, Lithuanian, or Estonian), interviewees could choose which language was more convenient for them for the interview. Moreover, interviewees were free to choose the environment the most suitable for them even if it was in another city. Before the interview, some general chats were running to ensure trust and a better atmosphere. Once a good contact came, the interview started. Most of our respondents were male, with only two females (one per country) participating in our study. To provide a rich, contextualised understanding of the adjustment of expatriates in the Baltic states, we built a diverse sample. Our respondents differed regarding their age, educational background, country of origin and duration of expatriation, which ranged from 2 months to 7 years in Lithuania and three months to 18 years in Estonia (see Table 1). Interviews were conducted in Estonia in English and in Lithuania in English and Russian. The duration of each interview was between approximately 45 and 60 min.

All interviews were recorded, transcribed and pseudonymised before further qualitative analysis was conducted. The interview data study followed the logic of qualitative content (Mayring, 2000), involving a deductive, theory-driven approach and an inductive, data-driven approach to developing codes. The deductive theory-driven approach was used, acknowledging Lithuania and Estonia as traditionally migrant-sending rather than receiving countries; therefore, we specifically focused on the environment, dividing it into work- and non-work-related environments and individual characteristics (Black et al., 1991; Haslberger et al., 2014; Stoermer et al., 2018). Furthermore, we derived our codes from the P-E fit theory, separating supply and demand codes (Caplan, 1987; Haslberger

Table 1
General information about expatriate participants.

No.	Pseudonym	Sex	Age	Education degree	Country of origin	Host country	Duration of stay in host country	Dependents in host country
1	Mike	M	44	Bachelor's	Canada	Estonia	18 years	Yes
2	Ashley	M	45	Master's	UK	Estonia	12 years	Yes
3	Antonell	F	40 +	Bachelor's	South Africa	Estonia	3 months	Yes
4	Florian	M	30	Two Master's	Germany	Estonia	10 months	Yes
5	Rudiger	M	40 +	Bachelor's	South Africa	Estonia	7 months	Yes
6	Justin	M	40 +	High school diploma	South Africa	Estonia	1.5 years	Yes
7	Matti	M	27	Vocational school	Finland	Estonia	1 year	No
8	Kari	M	40	Master's	Finland	Estonia	3 + years	Yes
9	Samuli	M	27	Bachelor's	Finland	Estonia	2 years	No
10	Mark	M	30 +	Several degrees	South Africa	Estonia	3 months	Yes
11	Murad	M	30	Two Master's	Azerbaijan	Lithuania	2.5 years	Yes
12	Oliver	M	45	Master's	Estonia	Lithuania	7 years	Yes
13	Andrew	M	40	Bachelor's	Ukraine	Lithuania	1 + year	No
14	Julio	M	37	Professional secondary	Ukraine	Lithuania	2 months	No
15	William	M	47	Professional secondary	Ukraine	Lithuania	2 months	No
16	Aaron	M	25	Master's	India	Lithuania	5 years	No
17	Marcus	M	30	Bachelor's	Hungary	Lithuania	2.5 years	Yes
18	Olivia	F	25	Bachelor's	Ukraine	Lithuania	3 years	Yes
19	Jim	M	25 +	Master's	Nigeria	Lithuania	5 + years	No
20	Abishek	M	25 +	Master's	India	Lithuania	5 + years	No

et al., 2014). They served as a base for initial coding. An inductive data-driven approach was used to develop sub-codes and specifications. Two other authors who did not conduct interviews did coding independently. Subsequently, results were compared, discussed and revised to maximise inter-coder reliability (Frankfort-Nachmias & Nachmias, 1996). Reliability was calculated using Cohen's kappa, which in our case was 0.91, suggesting perfect agreement according to Lombard et al. (2002). A final coding tree was then agreed upon by all authors (see Table 2 for the coding tree).

Research Findings

Our respondents report having successfully adjusted in Estonia and Lithuania. One of the reasons for this is the size and homogeneity of both Estonian and Lithuanian societies. Since Estonian and Lithuanian nationals are used to meeting few foreigners, they attempt to interact with them as much as possible.

In the following sections, we first discuss adjustment factors according to the supply and demand of expatriates' work- and non-work-related environments and then discuss how expatriates' personal characteristics influence their adjustment.

Our data suggest no differences concerning factors for the adjustment of expatriates in Estonia and Lithuania; respondents in both countries highlighted all the challenges presented in the following sections.

Work-related environment

We identified a range of work-related environment factors that influence the adjustment of expatriates in Estonia and Lithuania, such as the general situations of their organisations. This includes salary levels, systematised organisational support structures for expatriates, and the organisational culture, explicitly concerning language, which was highly important.

Supply in work-related environments

Compensation. Regarding the compensation provided by organisations, salaries in the Baltic states were mentioned, which were below

Table 2
Coding tree of factors for expatriates' adjustment in Lithuania and Estonia.

Adjustment factors	Code	Sub-code	Specification	Definition
4.1 Work-related environment	4.1.1. Supplies	Compensation	*Salary*	Satisfaction (or dissatisfaction) with salary levels.
		Organisational support	*Pre-departure support*	Existence of pre-departure support for expatriates from sending and receiving organisations.
			Official organisation support at the beginning of the employment	Lack of information/contact person to guide and support as a new hire
			Informal support from colleagues	Satisfaction with hospitable atmosphere among co-workers
	4.1.2. Demands	Organizational culture	*Clash of working cultures*	Situations in which a clash of working cultures has led to problems for expatriates.
		Language	*Working language*	The working language in the organisation.
4.2. Non-work-related environment	4.2.1. Supplies	Transportation	*Remote location and lack of connection and transportation*	The peripheral location of the country within the European Union and difficulties in reaching Estonia/Lithuania (e.g., flights).
		Information	*Information necessary for official issues and everyday life*	Lack of information for living registration, ID card, etc.
		Non-governmental infrastructure	*Difficulties with everyday life issues and the integration of spouse or family*	Issues related to everyday life, such as accommodation, shopping, … e.g., dissatisfaction of spouse or family with the new environment, difficulties in finding jobs/schools/kindergarten for them.
		Safety	*Security*	Security concerns in Estonia/Lithuania.
		Social networks	*Existence of friends before expatriation*	Knowledge about the country from friends and acquaintances before expatriation
	4.2.2. Demands	Geographical location	*Climate*	Climate issues in Estonia/Lithuania.
		Administrative issues	*Bureaucracy and administration in personal life*	High levels of bureaucracy and administration in non-work-related matters (e.g., registration for residency, visa, healthcare, etc.).
		Language	*Language barriers outside the organisation*	When shopping, for example, or trying to establish new contacts.
		Contacts with locals	*Lack of local friends*	Problems in establishing contacts with local Estonians/Lithuanians and finding new friends.
4.3. Individual characteristics	4.3.1. Previous international experience		*Previous experience abroad and international self-orientation*	Did the respondent have any international experience before coming to the host country, or are they internationally oriented?
	4.3.2. Perception and understanding of the host country and its culture		*Negative associations with the country's Soviet past*	Rethinking the move to Estonia/Lithuania because the country is still negatively associated with its Soviet past.
			Country widely unknown	Rethinking the move to Estonia/Lithuania because many people do not know the country.

the European Union average:

> '< …> salary was not like I expected. It is certainly not as high.' (Olivia from Ukraine, three years)

Previous research shows that expatriates have certain expectations of their future salary in the host country depending on their previous experience, individual factors, career attributes, and location (Duarte et al., 2021; Sarkiunaite & Rocke, 2015). Salaries in Estonia and Lithuania are lower than the EU average, which suggests that the pull of highly qualified expatriates to organisations in these countries based on salary might not be successful.

Organisational support. We discovered that respondents found it helpful and more secure when companies provided them with information and support before their arrival.

> 'It was good that I had an interview first. To avoid cheating. There were cases in Ukraine where Ukrainians paid money for work positions and did not get work.' (Andrew from Ukraine, 1 + year)

Our data show that only a few local organisations have experience hiring expatriates. At other companies, expatriates face challenges adjusting to organisational structures, procedures and contexts. This is mainly because they needed more information and a contact person assigned to support them.

> 'Maybe some specific terms were missing at the start. There were also some issues regarding work procedures. I was not asking but just doing as far as I understand. Later, I knew that I could ask for help. But I was not familiar with my colleagues. I did not even know their names to call and ask for help.' (Andrew from Ukraine, 1 + year)

> 'It would be very useful to have a person who might help with different issues or at least provide orientation in the new country. It would be great to ask questions and get answers.' (William from Ukraine, two months)

Organizational support before and during expatriation has been widely researched in expatriation literature, along with its influence on expatriate adjustment. The unpreparedness of organisations in Estonia and Lithuania to employ expatriates aligns with these recently becoming expatriate-receiving countries. Time is needed for companies hiring expatriates to develop strategic expatriate receiving, training, and retaining plans (Tahir, 2018).

Many of our respondents reported that the informal support provided by colleagues was critical in resolving initial difficulties. Despite missing information about formal procedures, respondents considered their colleagues very helpful.

> '< …> there was the most hospitable atmosphere I have ever joined. They helped a lot with the language, with everything.' (Olivia from Ukraine, three years)

Demand in work-related environments

Organisational culture. Our data show that one of the problems expatriates face in the organisational context is the adjustment to different organisational and work cultures.

> 'In the company, there is more competition. I am more used to teamwork. For a company, competition is always better, but I would like to work in a team. Even if we work together, we are still competing.' (Andrew from Ukraine, 1 + year)

Since companies in the same country might have different organisational cultures, it may be easier for expatriates to navigate in certain companies than others.

> 'I did not like the company policy where I was working before. I did not like how we were working there. I did not like the surroundings and how people acted in that company—even my own colleagues. The organisational culture. Problems or differences that led me to change my job. Because I was not feeling well there. < …> I would recommend this one (current company for expatriates).' (Marcus from Hungary, 2.5 years).

Language. Language barriers were lower than expected in atypical expatriate destinations such as Estonia or Lithuania. Respondents reported that many colleagues were willing to interact in foreign languages (e.g., English or Russian) at the workplace.

> 'Yes, I think—I mean, my boss, for example. He speaks to me in English. It's a bit easier because if I have a lot of stress and emotions, it is easier if I speak English and he speaks to me in English because his English is better than my Estonian. So that makes it easier. Plus, lots of colleagues also speak in English.' (Mike from Canada, 18 years)

> '< …> They tend to switch languages as soon as I walk into the room, which is awesome, pretty nice.' (Rudiger from South Africa, seven months)

However, after being an expatriate for a longer period, respondents started to find this behaviour irritating because it prevented them from practising the local language.

> 'I greet others with "Labas" ("Hello" in Lithuanian), but my colleagues automatically switch to English. < …> At the beginning, it was fine, but now I would like to communicate more in Lithuanian.' (Jim from Nigeria, 5 + years)

While language is one of the most common barriers expatriates face in the host country (Zhang & Peltokorpi, 2016), our study shows that Estonians and Lithuanians are well-versed in English and easily communicate with expatriates in English. However, more studies are needed to explore the situations when expatriates do not speak English or the local language.

Non-work-related environment

In addition to issues originating from and resolved within a work-related context, expatriates in Estonia and Lithuania experience the supply and demand of their non-work-related environment. This frequently includes access to practical information, support, bureaucratic procedures, and health care, as well as issues related to the two countries' geographical location.

Non-work-related environment supply

Transportation. Transportation is another significant challenge for expatriates since the Baltic states are in a peripheral location within the European Union, with the small populations of Estonia and Lithuania exacerbating the issue. There are few direct flights to big European cities, with no direct flights to other continents. Respondents mentioned a need for more suitable transport options to their countries of origin.

> *'Flight connection is very poor. But again, that's understandable. Estonia has a small population and, therefore, you are kind of the last choice for a lot of short- and long-haul carriers.' (Ashley from the UK, 12 years)*

Even though the respondents noted international transportation, more studies are needed to explore local commute and transportation-related issues and how they affect expatriates' adjustment.

Information. The Baltic States are not ready to receive many expatriates because their governmental institutions are not prepared to meet the various needs of such individuals. Although websites are officially designed to be bilingual (or cover even more languages), most information is provided in the local language only.

> *'Websites in Estonia are different in Estonian than they are in English. So they have a lot less information on them in English than there is in Estonian.' (Rudiger from South Africa, seven months)*

Again, respondents reported that support from local friends and acquaintances was crucial in such situations.

> *'Like in any country, you rely a little bit on friends from that host country to guide you through a little bit. It isn't realistic that, as a foreigner, you go somewhere and get everything you need; you need a bit of guidance. < …> I just used friends, and they told me to get an ID card and register for taxes.' (Ashley from the UK, 12 years)*

> *'The people I work with gave me a lot of advice regarding registering for an ID card.' (Rudiger from South Africa, seven months)*

Since Estonia and Lithuania are small countries with low numbers of expatriates, the most significant challenges lie in situations previously unknown to government officials (e.g., the immigration of unmarried spouses with children).

> *'Issues were mostly with my daughter, bringing her over because my ex and I are not married. So, getting her into the country—I couldn't do it on my visa. She had to find work. That part was very difficult.' (Justin from South Africa, 1.5 years)*

Non-governmental infrastructure. Expatriates face challenges adjusting to local non-governmental infrastructure. They face accommodation and medical care difficulties because locals and foreigners are treated differently.

> *'Regarding accommodation, one of the trends that I see is that if you phone a person to rent out an apartment, there is hesitance to rent it out. That's something that we experienced when we were searching for one. When I would phone, the apartment would be taken. When my employer would phone, then we were able to have a chance to go and view it at least.' (Rudiger from SA, seven months)*

> *'I had a health problem and contacted a private health centre because I was not able to use free public health care; I had to pay everywhere. But my company returned all the money I have paid for visits, and I got a salary for those days as well. I pay all taxes, including health insurance. But it is not working so far since I do not have residency status.' (Andrew from Ukraine, 1 + year)*

Safety

Our data also revealed that respondents perceive Estonia and Lithuania as very safe countries where a certain living standard can be guaranteed.

> *'Together with us, two other guys are living here, and they came from Donetsk, where a war is going on. We are also telling them that there is no sense to return there.' (Julio from Ukraine, two months)*

> *'My number one factor was safety. So, how is the crime level in Estonia? That was my main gauge as to how liveable the country is. So everything else was secondary to that.' (Rudiger from South Africa, seven months)*

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Social networks. Moreover, our data show that having friends in the country supports the motivation and decision to expatriate to Estonia or Lithuania and eases the adjustment process.

> *'I've had Estonians as workers before coming here, so that way, I've got some help for setting up here.' (Matti from Finland, one year)*

> *'When I get to know about Lithuania, it was from my friend who mentioned that he came for a master's here.' (Aaron from India, five years)*

This is in line with the literature, which notes that, depending on the sources of information an expatriate gathers before their transition, the adaptation might be more straightforward or more challenging (Haslberger et al., 2014; Mezias & Scandura, 2005).

The demand side of non-work-related environment

We identified three groups of non-work-related environment demand factors. These are related to geographical location, visa applications and local language issues.

Geographical location. Since the Baltic states are in Northern Europe, the climate is not very mild and warm. However, the respondents had few negative viewpoints because they expected such a situation before moving to the Baltic states or because they enjoy this climate and nature.

> *'Climate. If it is snow, it is not bad. But when it is windy, it is very hard for me to come safe.' (Aaron from India, five years)*

> *'I am rather attracted to the North than to the South. I would rather enjoy pine forest to palm trees and it always used to be for me. And I already was in love with Estonia and Finland. Lithuania is more southern than them but still considered Northern Europe.' (Marcus from Hungary, 2.5 years)*

Administrative issues. Like many small countries, Estonia and Lithuania do not have embassies in many regions of the world which can cause problems for expatriates when applying for visas.

> *'We went to India (for a visa). To the Estonian embassy there because South Africa doesn't have an Estonian embassy—we have an honorary consulate. So, I applied for a visa on the basis of my husband's visa, and then they came through.' (Antonell from South Africa, three months)*

Language. Although our respondents found it easy to make local friends who were willing to help them in many situations, the language issue was more ambiguous. On the one hand, respondents perceived it as positive that Estonians and Lithuanians would switch to foreign languages (e.g., English or Russian) for them. On the other hand, they did not have many opportunities to practice their host country's local language. Overall, the respondents were learning the local languages but were not always helped by the locals' reactions to their attempts to speak the local languages.

> *'Despite my Lithuanian language is quite good, they switch to English in all meetings, even I am alone foreigner. < ...> Hearing my Estonian accent, they <sellers in fruit market> immediately switch to Russian' (Oliver from Estonia, seven years)*

> *'Estonians are so happy to switch to English immediately, and that way, nobody has the chance to learn the language.' (Florian from Germany, ten months)*

Personal Characteristics

We also focused on the personal characteristics of our interviewees that played a role in their adjustment. These include their previous international experiences and perceptions of their host country.

Previous international experience and self-orientation

In addition to their age, gender, country of origin, and educational background, our respondents differed in their degree of previous international experience. For some, moving to the Baltic States was their first experience outside their countries of origin, whereas others had lived abroad. Many of our respondents reported having had experiences with their host country before deciding to expatriate—either studying there or travelling to it—which sometimes led to an interest in the country's history, politics, landscape, or culture.

> *'I started to study Lithuanian in Hungary, in my university. Then, I was offered a scholarship to come here, but it was not my first time here. Because I went to Estonia, I travelled through here. So, I know what I could expect.' (Marcus from Hungary, 2.5 years)*

> *'I came to the country because I was interested in the history and politics of Estonia, and I got to my current company because I saw the job offering after having finished my master's degree at Tartu University (in Estonia).' (Florian from Germany, ten months)*

> *'I like Lithuanian nature and culture. I got used to it during my master's degree studies in Kaunas (Lithuania).' (Murad from Azerbaijan, 2.5 years)*

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Perception and prior knowledge of a host country

We expected certain factors to present challenges for governments and local businesses in attracting talented workers from abroad to Estonia and Lithuania, such as the size of the country, not being well-known countries, and having a turbulent history—especially their Soviet past. However, our data show that such perceptions of the two countries play a minor role in the motivations and challenges of expatriates. Only a few of our respondents referred to negative historical perceptions in our interviews, for example:

> *'There are some things that I found less developed here than in Hungary. Of course, Hungary is a bigger country - 10 million people. It has not been a part of the Soviet Union but just the Eastern Europe block. There are some times when I feel there is more infrastructure in Hungary and less here. For example, I am going to swim, and there is only one public swimming pool open at this time (autumn) in the whole city.'* *(Marcus from Hungary, 2.5 years)*

In stark contrast to this statement, other respondents highlighted positive perceptions of their host country, for example, declaring Estonia the *'start-up country of Europe'* *(Mark from South Africa, three months).*

However, other respondents reported coming to Estonia or Lithuania with little previous knowledge and expectations.

> *'I had no expectations, but I am so pleased. < ...> It's a very nice environment to work in; the people are very nice. Positive working environment.'* *(Antonell from South Africa, three months)*

> *'I tried to come with as few expectations as possible so as not to be surprised. And it was a pleasant experience. I was greeted quite nicely. Such open and warm people, which was very outside the Estonian stereotype.'* *(Rudiger from South Africa, seven months)*

Discussion

The present study has revealed that in both studied contexts, the environmental supply and demand factors were similar.

In reply to the first research question - what work-related adjustment factors related to environmental supply and demand do expatriates require – we found that the range of supply-side work-related environmental factors mentioned by the interviewees includes lower salaries when compared to other EU countries, limited support structures, and the absence of information before and upon arrival. As expatriates have certain expectations regarding salary based on their factors (Duarte et al., 2021), the lower-than-EU average salaries in Estonia and Lithuania might prevent highly qualified expatriates from choosing these countries for their residences. In addition, limited support structures and information upon arrival were mainly related to government institutions or organisations rather than individuals in the host country. The individual informal support in accessing information and handling language issues offered by fellow employees was a positive aspect of the supply side of the work-related environment. These findings align with studies by Froese et al. (2012) and Kräh et al. (2015), showing that access to and dissemination of organisational information is essential. They may remain unmet needs for expatriates who struggle with language barriers.

On the demand side of the work-related environment, more competitive organisational cultures were perceived negatively, while the willingness of local employees to speak in a foreign language was a positive aspect. Contrary to a study by Hildisch et al. (2015), we found limited social exclusion as a demand of the workplace environment, based on the accounts of respondents, which mainly mentioned the information and language barrier issues, and these were strongly mitigated by the willingness of local employees to speak a foreign language. This might be related to both countries having over 50 years of closed borders while in the USSR, leading to people wanting to appear more worldly and Western. More studies are needed to research how countries that gained democracy after authoritarian rule change and adapt to accepting expatriates on country, organisational and individual levels.

In reply to the second research question - what non-work-related adjustment factors related to environmental supply and demand do expatriates reveal – we noticed that a range of non-work-related environment supply was necessary for the studied expatriates, including information provided by government offices (or lack thereof), transportation, safety, and access to non-governmental infrastructure. The lack of practical information could be highlighted as the most challenging issue, thus confirming the findings of Copeland and Griggs (1985) and Haslberger and Brewster (2008). Furthermore, they were dissatisfied with bureaucratic hurdles, limited international travel connections, and the lack of access to public healthcare for those without resident status. Therefore, general information about legal and administrative issues might contribute to expatriate adjustment (Torbiörn, 1982; Weeks et al., 2010). However, in line with the findings by Peltokorpi (2008) that expatriates who make social initiatives tend to be successful in living and working abroad, we also found a positive impact of social networks on adjustment. Contrary to our expectations, the interviewed expatriates in Estonia and Lithuania highlighted locals' high relational support. It might be explained that these are individualist societies with low power distance. Moreover, locals do not meet too many foreigners and are not 'tired' of them or disappointed with them. Respondents evaluated relations with locals positively since they have foreign and local friends, confirming successful non-work-related adjustment in most of the researched cases (Haslberger & Brewster, 2008; Waxin & Panaccio, 2005). Furthermore, the respondents' social networks were crucial for expatriating to Lithuania or Estonia.

Notably, respondents were largely positive about safety in the explored cases. This is unsurprising since Estonia ranked 11th and Lithuania ranked 36th in the Global Safety Index in 2020, and most of the interviewed expatriates (with some exceptions) came from less safe countries (Safety Index by Country, 2020,20, 2022).

On the demand side of non-work-related environments, respondents pointed out the cold climate and their visa problems, the latter of which were due to a limited number of consulates for the two studied Baltic countries abroad. These results relate to insights from Hippler et al. (2014) on the importance of environmental factors for expatriates. Cultural novelty had less impact on the studied expatriates' adjustment than might be assumed, even though Black et al. (1991) stressed the importance of this factor. Although most

of the interviewed expatriates were from neighbouring cultures, even expatriates coming from faraway countries like Canada, India, or South Africa were accepted without cultural clashes. As noted in the scientific literature review, contextual factors depend on having family in the country. Language also plays a vital role in the adjustment and contextual environment (de Sivatte et al., 2019; Lewis, 1997). However, most respondents did not experience language issues since locals were willing to communicate in a foreign language. However, they faced issues finding information because practical information on websites was more plentiful in the local languages. Moreover, expatriates found it challenging to learn the local languages since they did not have enough opportunities to communicate in the local language of their host country.

To respond to the third research question - what personal characteristics related to their successful adjustment do expatriates reveal – we identified that previous international experience did not play a role in the adjustment of our respondents in both contexts, which does not support previous studies by Lazarova et al. (2010) and Black et al. (1992). However, the information or experience of visiting the host countries positively impacted the adjustment. This implies that doing one's 'homework' before arriving helps the self-initiated expatriates, which corresponds with the anticipatory adjustment highlighted by Black et al. (1991).

Theoretical contributions

The study fills the earlier highlighted research gaps by exploring expatriate adjustment in societies where immigration is still considered a new phenomenon (Egitim & Akaliyski, 2024) and expanding such studies outside rich Western countries (Kunst et al., 2023). Moreover, this study contributes to the literature on adjustment using the P-E fit model (Haslberger et al., 2014), where we investigated in-depth the demand and supply sides of the work and non-work environments. Our study expands knowledge about adjustment in previously unexplored ex-USSR countries. P-E model was studied in homogeneous Eastern European countries that have recently faced an immigration phenomenon with a particular focus on both the environment and the personal characteristics of the respondents.

Practical implications

Based on the results of the present study, we provide suggestions for receiving organisations and policy-makers. To address the supply side of the work-related environment, receiving organisations should prepare *a welcome package* that includes practical information, including contacts and essential information about the organisational structure, the main organisational rules and regulations, responsibilities of employees, and organisational cultural and social fabric to expatriates. This package should reach expatriates before they arrive in the host country. In addition, based on the literature review (e.g., Caligiuri & Lazarova, 2002; Holtbrügge & Ambrosius, 2015) and the results of this study, we recommend assigning a mentor to each expatriate in an organisation (local or foreign) who could help to deal with their everyday work and personal issues at least at the beginning of them starting a new job. A mentor should be introduced to the expatriate immediately after joining the organisation or might even meet them on arrival. Moreover, organisations should support their expatriate employees by helping them before, when, and during their stay. Thus, they could help with practical issues and help them enrol in either language or specific formal courses.

The results revealed that the most significant challenges for adjustment were related to the supply side of the non-work-related environment in the explored countries. This corresponds to our primary idea that Lithuania and Estonia still need to prepare to meet the needs of expatriates at the organisational and country levels since they are changing from expatriate-sending to expatriate-receiving countries. Regarding non-work factors, policy-makers' support should be discussed in terms of providing support to expatriates in adjusting to social life in Lithuania and Estonia. Governments should make all practical information available online in English and Russian, bearing in mind that Ukrainian refugees come to these countries. In addition, it would be beneficial to integrate expatriates into different social activities, increasing their level of integration into the company and providing intensive local language training. Finally, policy-makers should spread goodwill and news about expatriates' positive adjustment experiences in host countries and abroad. For example, the European Commission (European Commission, 2022) highlighted Lithuania as the best country in the EU to employ Ukrainians.

Limitations and future research directions

Since our study is based on a relatively small number of interviewees (20) in two ex-Soviet Eastern European countries, the findings are related to two specific studied contexts and cannot be generalised. Therefore, we suggest using this study's findings as a basis for a large-scale quantitative study spanning different industrial, business, and public sectors. The quantitative and/or qualitative study could be conducted in Estonia and Lithuania, revealing a current situation because, during a period after the study was performed, the COVID-19 pandemic occurred and the Ukrainian-Russian war began. Due to the continuity of the war, many Ukrainian refugees moved to Lithuania and Estonia. Moreover, recent updates of Hofstede's dimensions (Country comparison tool, 2023) show changes in individualism and long-term orientation between Lithuanians and Estonians. Therefore, studies that include different, non-Western countries and cater to gender diversity for future research could be proposed.

Additional limitations stem from the different durations of participants' stays in the host country. Although such sampling has allowed us to investigate the diversity of expatriated adjustment, further research might add another layer of interpretation to our results regarding the time of expatriation. So, further studies can focus on analysing how expatriates who entered a country when it was still a migrant-sending country adjust to the changes brought by it becoming a migrant-receiving country.

Since we investigated only some of the factors describing the supply and demand sides of the using environment, further research

should draw upon the insights provided by this study and include quantitative analyses that provide statistical testing of further elaborated P-E fit models.

In addition to the factors discussed above, such research might include personality features at the individual level (e.g., extroversion (Olivia) and introversion (Marcus)). It could focus on the role of organisational measures in cultural sensitivity (e.g., teamwork training for all staff but not for expatriates (Marcus) or home festivals at host companies (Aaron)) in the work-related environment. Future research might also consider diaspora activities in the non-work-related environment and their impacts on expatriate adjustment.

Finally, this study focused on something other than the specific needs of expatriates. Thus, more studies could be performed to reveal these specific needs regarding support and services, providing valuable recommendations for policy-makers and local institutions.

Conclusions

Our study aimed to reveal environmental factors that might influence expatriate' adjustment in Estonia and Lithuania, once known as expatriate-sending countries. The study fills previously highlighted research gaps to explore adjustment in societies where immigration is still considered a new phenomenon (Egitim & Akaliyski, 2024). We divided our findings into work-related, non-work-related factors and personal characteristics. The findings revealed that, although Estonia and Lithuania are different countries, expatriates noted similar factors affecting their adjustment in both countries. In addition, results show that limited support structures and information upon arrival mainly relate to government institutions or organisations rather than individuals in the host country. The individual informal support in accessing information and handling language issues offered by host country nationals at work and non-work environments was a positive aspect of expatriate adjustment.

In conclusion, the main contribution of this study was to reveal that more research is needed to analyse expatriate adjustment in the countries that gained democracy after authoritarian rule at the country, organisational and individual levels. Such countries are young democracies now, but the historical background still shapes them (government structures and individual people) to be unique in accepting and supporting expatriates.

CRediT authorship contribution statement

Liudvika Leisyte: Conceptualization, Methodology, Supervision, Validation, Writing – original draft, Writing – review & editing. **Vilmante Kumpikaite-Valiuniene:** Conceptualization, Formal analysis, Methodology, Project administration, Supervision, Validation, Writing – original draft, Writing – review & editing. **Jurga Duobienė:** Data curation, Investigation, Writing – original draft, Writing – review & editing. **Anna-Lena Rose:** Conceptualization, Formal analysis, Methodology, Validation, Writing – original draft, Writing – review & editing. **Irma Baneviciene:** Formal analysis, Investigation, Methodology, Supervision, Visualization, Writing – original draft, Writing – review & editing. **Ruth Alas:** Data curation, Investigation, Validation, Writing – original draft, Writing – review & editing. **Kestutis Duoba:** Data curation, Investigation, Writing – original draft, Writing – review & editing.

Annex.　Interview schedule

Introduction

Introduction to the study, use of data and permission to record.

Personal characteristics and professional background

1. Where do you come from?
2. Do you have family or dependent persons at home or living with you here?
3. Could you tell me about your educational background and career before joining the organisation?
4. At the moment: What is your position at your current company, and what are your main responsibilities?
5. What kind of contract do you have, and for how long have you been employed at the company?
6. How would you characterise your immediate work environment in terms of organisation?

Professional mobility

1. When did you first consider coming to the country and your current company, and why?
2. What were the most important positive and negative factors that influenced your decision to come to the country and work for the company?
3. How do/did you like working at this company? What were your expectations, and have they been fulfilled?
4. Have you encountered any problems when coming here or during your stay in the country in general and at the company? If yes, what were they?
5. Has the company, another organisation, community or individual supported you in dealing with these problems and in which way?

Adjustment to the local context

1. How well are you integrated into your company and the local business network?
2. What efforts does the company take to facilitate the integration of expatriates into the local context?
3. In your opinion, to what extent do expatriates have an impact on how things are done within the company? To what extent do they influence (separate questions):

- Organisational procedures and work culture?
- Decision-making at the company?
- Internationalisation and diversity at the company?

4. How satisfied are you, overall, with your decision to come and work in the country, and why?

- How satisfied are you with work-related aspects?
- How satisfied are you with aspects related to your personal life here?

5. Have you considered returning to your country of origin or moving to another country? (If yes, why, where and when?)

Reflection

1. How attractive is your current company as a workplace for expatriates? Has this changed over the years? Why?
2. What could the company do to improve its attractiveness for expatriates?
3. What could be done to facilitate the adjustment of expatriates in the country/ at the company? Sending vs receiving organisation?
4. Do you know any other expatriates at your company or another company that might be interested in participating in our study and that you could recommend us to?
5. Do you have any questions or remarks, or are there any relevant points we have not yet covered in this interview?

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Paper 3

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The Impact That Different Types of Organizational Cultures Have on the Adjustment of Self-Initiated Expatriates

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This paper investigates the adjustment of self-initiated expatriates, with a particular emphasis on organizational culture. One hundred and twenty-five self-initiated expatriates around the globe participated in the online survey. We examined the impact that organizational culture has on self-initiated expatriate work and non-work-related adjustment using multiple linear regression analysis. Four types of organizational culture (clan, adhocracy, market, and hierarchy) were explored. The results revealed that Clan culture has a positive effect on the work and non-work-related adjustment of self-initiated expatriates.

Keywords: organizational culture, culture types, self-initiated expatriates, adjustment, work adjustment, non-work adjustment

INTRODUCTION

Economic globalization requires an increasing number of people to work abroad for short or long periods of time (Cappellen and Janssens, 2010). This includes expatriates (Al Ariss and Özbilgin, 2010; Andresen et al., 2014; Cerdin and Le Pargneux, 2014) and migrants (Guo and Al Ariss, 2015; Hajro et al., 2019) who move abroad for work-related reasons. All of these individuals need to adjust to their new countries and organizations (Black et al., 1991; Haslberger et al., 2014). The multidimensionality of this adjustment process has been discussed in both acculturation and expatriation literature. Researchers who study the adjustment process that expatriates undertake focus on different aspects of their experience, such as adjustment models and types of adjustment (Lysgaard, 1955; Black et al., 1991; Waxin, 2004; Liu and Lee, 2008; Haslberger et al., 2014), adjustment processes (Shaffer et al., 1999; Chen et al., 2002; Rosenbusch and Cseh, 2012), cultural shock (Oberg, 1960; Sims and Schraeder, 2004; Qin and Baruch, 2010; Rajasekar and Renand, 2013), or factors that influence adjustment (Black, 1990; Black and Gregersen, 1991; Aycan, 1997; Hechanova et al., 2003; Mezias and Scandura, 2005; Selmer and Lauring, 2009; Barner-Rasmussen et al., 2014; Feitosa et al., 2014). Moreover, most of the research on expatriate adjustment focuses on individual factors that predict adjustment and performance without paying adequate attention to organizational antecedents (e.g., Black, 1990; Barner-Rasmussen et al., 2014).

The type of organizational culture (Pinto et al., 2011) and cultural novelty (Black and Gregersen, 1991) have been noted to be organizational antecedents of adjustment. Even though

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some studies identified a negative association between culture novelty and adjustment (e.g., Black and Stephens, 1989; Shaffer et al., 1999; Bhaskar-Shrinivas et al., 2005; Pinto et al., 2011), less attention has been paid to the influence that a given type of organizational culture has on adjustment. Therefore, the lack of research on organizational factors, particularly on the influence of organizational culture type, is apparent. Cultural novelty is defined as a person's perception of how different from each other are home and host country (Black and Stephens, 1989). An organization's cultural novelty is usually analyzed by comparing the organizational cultures of an assigned expatriate's home and host countries; however, there is currently an increasing demand for self-initiated expatriates and their growing mobility (Fee and Gray, 2020). Two types of expatriates are most commonly analyzed in the scientific literature: assigned expatriates (AEs) and self-initiated expatriates (SIEs). AEs are described as employees (mostly professionals or managers) who are sent by their employer to a foreign subsidiary (Suutari and Brewster, 2000; Andresen et al., 2014; Przytuła, 2015; McNulty and Brewster, 2017). In comparison with AEs, SIEs could be described as individuals who are not sent abroad by their organization but instead decide to look for international work experience on their own (Suutari and Brewster, 2000; Meuer et al., 2019; Andresen et al., 2020). By their initiative, SIEs join a new organization, which usually has nothing in common with the previous company that they worked for in their home country.

Most studies on expatriate adjustment focus on AEs (e.g., Aycan, 1997; Andreason, 2003; Pinto et al., 2012). The same could be said about research that centers on organizational culture type and adjustment (e.g., Black et al., 1991; Pinto et al., 2011, 2012). This means that current research overlooks the potential influence of organizational culture type on the adjustment of SIEs, which is a gap that this study aims to fill.

Our paper is organized in the following way. First, our theoretical framework is presented. This initial section begins with a discussion about the adjustment of expatriates and is followed by an introduction to the different organizational culture typologies and the links between organizational culture types and expatriate adjustment. The research instrument, research sample, and procedure are explained in the methodology section, as are the results of the quantitative research. A final discussion and an overview of conclusions, limitations, future research directions, and practical implications appear at the end of the paper.

THEORETICAL FRAMEWORK

Self-Initiated Expatriate Adjustment

The intercultural adjustment of expatriates is defined as a ratio of human psychological comfort and knowledge of a foreign culture (Waxin and Panaccio, 2005). Unlike AEs, SIEs are not sent abroad by a company and thus do not undergo any preparation for their adjustment to a new organization abroad. Therefore, in their case, anticipatory adjustment, which is utilized in the case of AEs (e.g., Black and Gregersen, 1991), is not formalized, so only in-country adjustment should be highlighted.

According to the most popular classification system, which was created by Black (1990), adjustment after arriving in the host country could be divided into (1) work adjustment, which refers to the comfort associated with the new job requirements abroad; (2) interaction adjustment, which refers to the adjustment associated with the socialization that takes place between the expatriate and their host country's nationals, both at work and beyond; and (3) general or cultural adjustment, which refers to the foreign culture and living conditions abroad.

Some additional classifications of expatriate adjustment could be noted. While exploring individual- and organizational-level predictors for expatriate adjustment, Aycan (1997) analyzed the relationship between general adjustment and work adjustment and did not include interaction adjustment. Similarly, in presenting a framework of international adjustment, Haslberger et al. (2014) highlighted work adjustment and non-work adjustment dimensions. The authors consider interaction adjustment to be a subset of both work and general (non-work) adjustment, explaining that interaction takes place in the work environment (e.g., with other employees or customers) and in general non-work environments (e.g., with people in public or neighbors) (Haslberger et al., 2014, p. 342). We agree with this type of approach and thus focus on work and general non-work adjustment in our study.

Non-work adjustment is related to the environment and factors outside of an organization. Country culture novelty, spouse or family adjustment, and individual features, such as previous international experience, host-language skills, and personal characteristics, could be highlighted as non-work factors that influence expatriate adjustment (Andreason, 2003; Bhaskar-Shrinivas et al., 2005; Pinto et al., 2012).

The work adjustment of expatriates is characterized by both good performance and positive attitudes toward their new work role (Aycan, 1997). While analyzing antecedents of adjustment, Black and Gregersen (1991) highlighted the role of work-related factors, such as job factors and organizational factors. Job factors include role clarity, role discretion, role novelty, and role conflict (Stroh et al., 1994; Pinto et al., 2011). Organizational factors include organizational cultural novelty and social support (Andreason, 2003). As studies on organizational factors' influence on work adjustment concentrated on AEs; the direct application of the terms is not suited for analysis of SIEs work adjustment. Social support for AEs consists of support from the home office, support from co-workers in the host country's subsidiary, and as SIEs had no home office to expect support from, we will not expand on the types of support SIEs receives. Organizational cultural novelty in previous studies concentrated on differences between the cultures at overseas subsidiary and at the home office where AE was sent from Black et al. (1991). In association with SIEs, the organizational cultural novelty would compare differences between the previous workplace and the new workplace taking different countries out of the context. Therefore, SIEs are more similar to national employees entering a new organization, and so we propose that organizational culture type rather than

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organization culture novelty could have an impact on SIEs work adjustment.

Links Between Organizational Culture Typologies and Expatriate Adjustment

Organizational culture could be defined as "shared values and basic assumptions that explain why organizations do what they do and focus on what they focus on" (Schneider et al., 2017, p. 468). These shared values are grounded in the history of an organization and are valid because they have been proven to be effective (Schein, 2010). New members in an organization should adjust to the values that are a part of the organizational culture. If the values are similar to the individual values of the acceptance of these values and transition into the organization become easier. How well a new employee fits into an organization could be described using the person-organization (P-O) fit theory. P-O fit theory is defined as "the compatibility between people and organizations which occurs when: (a) at least one entity provides what the other needs, or (b) they share similar fundamental characteristics, or (c) both" (Kristof, 1996, p. 45). Fit in managerial literature is identified by how similar an individual's characteristics (personality, values, goals, and attitudes) are to an organization's characteristics (organizational culture, values, goals, and norms) (Kristof, 1996; Lee and Wu, 2011). O'Reilly et al. (1991) revealed that organizational culture helps determine a person's "fit" within a particular organization because "fit" includes feeling comfortable with the culture. Hofstede (1993) research highlighted that individual values and organizational practices need to be integrated to increase the degree of P-O fit. Based on these findings, we propose that a particular type of organizational culture increases P-O fit and has a positive impact on the adjustment of expatriates.

Studies that focus on expatriate adjustment also highlight the importance of organizational culture (e.g., Black, 1988; Black et al., 1991; Pinto et al., 2011, 2012). The similarity between a parent organization's culture and the host's organization's culture also positively influences expatriate adjustment (Liu and Shaffer, 2005). As noted before, though, these types of studies mostly focus on AEs and proposed features, such as organizational culture novelty, social support, and logistical help (Black et al., 1991), which do not apply to SIEs because they are not connected to a parent organization; however, based on previous studies on expatriation (Black et al., 1991; Pinto et al., 2011, 2012), organizational culture could foster the work and non-work adjustment of expatriates, and one of the traditional typologies of organizational culture could measure it.

There are many typologies of organizational culture (e.g., Quinn and McGrath, 1985; Cameron et al., 1991; Trompenaars, 1994; Schneider et al., 1995; Goffee and Jones, 1988; Cameron and Quinn, 1999), but the majority of classifications are similar. However, probably the most popular classification is by dividing culture to *Clan, Adhocracy, Market,* and *Hierarchy* (e.g., Quinn and Rohrbaugh, 1983; Cameron et al., 1991; Cameron and Quinn, 1999).

The Clan and Adhocracy types could be described as dynamic and flexible cultures; however, the Clan culture is focused on employee involvement and friendly communication in the organization (Hartnell et al., 2011). Clan culture is characterized by high sociability, friendly relationships, and informality between group members. It is based on high communication and the values of loyalty and interpersonal connections, such as family or teamwork (Barner-Rasmussen et al., 2014). Furthermore, Clan culture is marked by employee commitment and concern and trust in people. We assume that this kind of employee-friendly culture supports new employees and fosters informal interactions that allow expatriates to gather more information related to non-work-related factors, which could be useful for their everyday lives.

Adhocracy culture is oriented around creativity and growth, risk-taking, and autonomy (Hartnell et al., 2011). Focus on community impact and a need for a high degree of flexibility and individuality are the key values for Adhocracy culture. The glue that holds the organization together is a commitment to creativity and innovation (Boggs, 2004). Furthermore, the culture encourages individual initiative and the freedom of employees. We assume that freedom and initiative could help expatriates better adjust and fit the organization. In addition, Adhocracy organization has external focus and differentiation (Cameron and Quinn, 1999), which, as we propose, could foster better non-work adjustment outside the organization.

While exploring the impact of organizational culture types on marketing professionals in the United States, Lund (2003) pointed out that organizational cultures that are guided by fraternal relationships, good mentors, and respect for the individual foster a higher level of adjustment. Focusing on the organizational culture typology created by Cameron et al. (1991), Lund (2003) highlighted that the Clan and Adhocracy types, which emphasize spontaneity and flexibility, encourage better adjustment. Therefore, we propose:

> *H1. Clan culture is positively associated with (a) expatriate work adjustment and (b) expatriate non-work adjustment.*

> *H2. The* Adhocracy *culture is positively associated with (a) expatriate work adjustment and (b) expatriate non-work adjustment.*

The Market culture is centered on competitiveness and achievement among employees (Cameron and Quinn, 1999). The main priority in this type of organization is competition and getting the job done. Its efficiency is measured in terms of achieving the objective. Stability, control, external focus, and differentiation are the main pillars of such an organization (Cameron and Quinn, 1999). The leader is a strict supervisor and demands excellence from the employees. This could influence the stress of employees. Looking at the provided characteristics of the Market culture, we propose that they do not promote the adjustment of expatriates and their fit into the organization. Therefore, the following hypothesis can be formulated:

> *H3. Market culture is negatively associated with (a) expatriate work adjustment and (b) expatriate non-work adjustment.*

The Hierarchy type emphasizes clearly defined roles for employees and highly formalized structures (Cameron and Quinn, 2006). The key value is control in the hierarchy organization. In addition to a high level of control, this culture could be described by bureaucracy, rules, and regulations and is characterized by the security of employment, conformity, predictability, and stability in relationships. Hierarchy culture focuses on internal maintenance and integration and a need for stability (Cameron and Quinn, 1999). The leaders pride themselves on being good coordinators and organizers who are efficiency-minded (Boggs, 2004). This type of culture does not develop deeper relationships among employees and is not friendly to new employees. We propose that a high level of control with plenty of rules and procedures, lack of flexibility and inner orientation do not help new expatriates to adjust either to the organization or outside it. Therefore, we formulate this final hypothesis:

> H4. The Hierarchical culture type is negatively associated with (a) expatriate work adjustment and (b) expatriate non-work adjustment.

Based on the expatriate adjustment models of Quinn and McGrath's (1985) and Black et al. (1991) and Haslberger et al. (2014) organizational culture typology, our research model is presented in **Figure 1**.

METHODOLOGY

Measures

Measures for the study were selected based on the expatriation model of Haslberger et al. (2014), the expatriate adjustment questionnaire of Black et al. (1991), and Cameron and Quinn (1999) organizational culture typology.
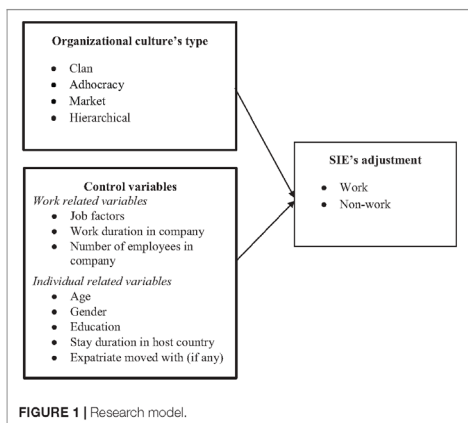

FIGURE 1 | Research model.

Dependent Variables

Work and non-work adjustment were evaluated according to the expatriate adjustment model of Black et al. (1991). The questionnaire was adapted for SIEs, and all questions related to AEs were excluded (e.g., "I would like to stay longer than assigned"). Work adjustment was determined by four statements, such as "The work in this organization so far has been successful" or "I feel adjusted to my organization." The Cronbach Alpha of the scale was 0.886. Five statements, including reversed (R) items, measured non-work adjustment (e.g., "The move so far has been successful," "It is difficult for me to adjust (R)," "I feel adjusted to this country"). The Cronbach Alpha of the scale was 0.887.

Independent Variables

We used Cameron and Quinn (1999) organizational culture typology (i.e., Clan, Adhocracy, Market, and Hierarchical). Organization culture typology was assigned using an organizational culture assessment instrument (David et al., 2018). Each organizational culture typology was evaluated by providing six statements for every culture. For instance, Clan culture examples consisted of statements such as "The organization is a very personal place. It is like an extended family. People seem to share a lot of themselves" and "The management style in the organization is characterized by teamwork, consensus, and participation." The Cronbach Alpha of the scale was 0.814. Adhocracy culture examples consisted of statements such as "The organization is a very dynamic entrepreneurial place. People are willing to stick their necks out and take risks" and "The organization emphasizes acquiring new resources and creating new challenges. Trying new things and prospecting for opportunities are valued." The Cronbach Alpha of the scale was 0.818. Examples that fell under the Market culture classification included statements such as "The organization is very results-oriented. A major concern is getting the job done. People are very competitive and achievement oriented" and "The organization defines success on the basis of winning in the marketplace and outpacing the competition. Competitive market leadership is key." The Cronbach Alpha of the scale was 0.744. Finally, Hierarchical culture was described through statements such as "The organization is a very controlled and structured place. Formal procedures generally govern what people do" and "The organization defines success on the basis of efficiency. Dependable delivery, smooth scheduling and low-cost production are critical." The Cronbach Alpha of the scale was 0.803.

Controlling Variables

Additional individual and work-related variables were incorporated into the questionnaire. Individual related variables consisted of age, gender, education, stay duration in the host country, the people who an expatriate moved with (if any), and citizenship status in the host country. Meanwhile, work-related variables included job factors, work duration in the company, and the number of employees in the company. Job factors, such as role clarity and freedom of actions, were measured according to the Black et al. (1991) questionnaire and evaluated using five statements, including reversed item: "My job responsibilities are clearly defined," "It is difficult to figure out my work role (R)," "I

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am given the freedom to define my work role." The Cronbach Alpha of the scale was 0.642.

A five-point Likert scale from 1 (strongly disagree) to 5 (strongly agree) was used for the measurement of work and non-work adjustment, organizational culture, and job factors.

Sample and Procedure

Data for this empirical study have been collected from expatriates around the world by distributing the surveymonekey.com online survey through the system portal surveymonekey.com. We shared the questionnaire on social media, especially in expatriate groups with members who lived across the globe. We also distributed the questionnaire to contacts around the world and shared it with expatriates on the www.internations.org contact page through direct messages. The questionnaire was written in English.

We collected data in March-May and September-December of 2019. We found many uncompleted questionnaires after the first phase, and therefore we shared our questionnaire link again after summer. In total, we received questionnaires from 259 respondents, of whom 43.2% of the questionnaires were incomplete. Thus, due to insufficient data, incomplete questionnaires were not further analyzed. The focus of the study was SIEs. The status of SIE was tested by the question "By whose initiative did you move abroad?" and all answers if respondents were sent by the organization were excluded from the final analysis. The final sample used for the analysis consisted of 125 SIEs working all over the world. All analysis was carried out using SPSS, version 27.

RESULTS

The Descriptive Statistics

The respondent group was very diverse. The total sample includes 125 respondents from 41 different countries working in 33 host countries. The descriptive statistics of the sample are presented in **Table 1**.

The mean of the SIEs age was 35 years old. Slightly more respondents were female (58.4%). The majority of SIEs had a BA, MA, or Ph.D. (88.8%). Stay duration in the host country varied. The majority of SIEs stayed in their host country for more than 5 years (43.2%), 1–2 years (20.0%), or 3–5 years (16.8%). Approximately half of the respondents (52.8%) moved abroad alone, and approximately one quarter moved with a spouse (24.0%) or their whole family (22.4%).

The work-in-company duration was similarly distributed. It varied between 15.2 and 25.6% of SIEs working up to 6 months and 20.8% working for a period of more than 5 years. The size of the companies that they worked for varied from organizations with 2–9 people (8.0%) to companies with over 1,000 employees (33.6%).

Results of Correlation and Regression Analysis

Correlation and multiple linear regression analyses were conducted to examine the relationship between adjustment and potential predictors (i.e., organizational culture and controlling variables such as individual and work-related predictors). **Table 2** summarizes the correlation analysis results. As the results illustrate, Clan and Adhocracy cultures and job factors are positively and significantly correlated with work adjustment. The SIEs with higher scores on indicated variables tend to be more adjusted to work. Meanwhile, Clan culture and controlling variables such as job factors and stay duration positively and significantly correlated with non-work adjustment.

Multiple linear regressions were run to predict the degree of expatriate work and non-work adjustment abroad in relation to organizational culture and individual and work-related variables (see **Table 3**). Multiple regression models with variables related to (1) individual, (2) individual and work, and (3) individual, work, and organizational culture were produced. The multiple regression models with all 12 predictors (see Step 3) to the work and non-work adjustment produced the following results, respectively: $F(12, 110) = 8.420$, $p < 0.001$, R Square = 0.479 and $F(12, 110) = 5.671$, $p < 0.001$, R Square = 0.382. As **Table 3** shows, job factors ($b = 0.599$, $p < 0.001$) and clan organizational culture ($b = 0.338$, $p < 0.01$) have a significantly positive impact on work adjustment. These two variables [respectively, job factors ($b = 0.480$, $p < 0.001$) and clan culture ($b = 0.322$, $p < 0.05$)] also positively influence non-work adjustment. This indicates that SIEs with higher scores on these scales were expected to have a better adjustment in work and non-work adjustment, which corresponds to H1. Furthermore, the duration of stay in the host country ($b = 0.173$, $p < 0.05$) also has a significantly positive impact on non-work adjustment. All other individual-related variables and work-related variables, such as work duration in the company and the number of employees in the company, did not contribute to the multiple regression model on work adjustment. The same can be said for all the other organizational culture types.

Our study revealed a significant positive correlation between Adhocracy culture and work adjustment ($r = 0.226$, $p < 0.05$); however, the regression analysis did not indicate the impact of Adhocracy culture on work adjustment. Therefore, H2a is not supported. These findings correspond in part to Lund's (2003) study, where a positive impact on work adjustment was discovered while studying local employees. No statistically significant relation was found between Adhocracy culture and general non-work adjustment, not supporting H2b.

Our assumptions that less people-oriented and not flexible Marketing and Hierarchical organizational cultures negatively influence work adjustment and non-work adjustment and our H3 and H4 were not supported. No statistically significant relationship was found between these constructs. Therefore, it could be explained that Marketing and Hierarchical cultures do not influence adjustment and fit organization of expatriates neither helping nor harming this process.

DISCUSSION

This study examined the influence that organizational culture type has on self-initiated expatriate adjustment. The empirical analysis attempted to assess the extent to which the work and

TABLE 1 | Descriptive statistics.

		N	%	Mean	SD
Dependent variables					
Work adjustment		125		3.94	0.85
Non-work adjustment		125		3.97	0.80
Individual related variables					
Age*				35.14	9.87
Gender	Female	73	58.4		
	Male	52	41.6		
Education	High school degree	14	11.2		
	BA, MA, PhD	111	88.8		
Stay duration in host country	Up to 6 months	15	12.0		
	6–11 months	10	8.0		
	1–2 years	25	20.0		
	3–5 years	21	16.8		
	More than 5 years	54	43.2		
Expatriate moved with (if any)*	Alone	66	52.8		
	Spouse	30	24.0		
	All family	28	22.4		
Work related variables					
Job factors		125		3.49	0.71
Work in company duration	Up to 6 months	32	25.6		
	6–11 months	19	15.2		
	1–2 years	24	19.2		
	3–5 years	24	19.2		
	More than 5 years	26	20.8		
Number of employees in company	2–9 people	10	8.0		
	10–50 people	18	14.4		
	51–100 people	13	10.4		
	101–250 people	8	6.4		
	251–500 people	18	14.4		
	501–1,000 people	16	12.8		
	Over 1,000	42	33.6		
Organization culture					
Clan				3.44	0.77
Adhocracy				3.01	0.80
Market				3.32	0.73
Hierarchical				3.52	0.76

*N = 124.

non-work adjustment of SIEs, in particular, could be explained by organizational culture type. Several interesting results emerged from the analysis.

Hypothesis 1 suggests that organizational culture types that promote close relationships, communication, and teamwork positively correlate with work and non-work adjustment. Results showed a positive impact of Clan culture on work and non-work-related adjustment and supported H1. Clan culture thus appears to offer the best fit between the organization and the person, corresponding with the P-O fit theory. As Pinto et al. (2011) noted, frequent social interactions are required to establish relationships in an organization, and expatriates who do not have local networks have trouble meeting these conditions. Clan culture is like an extended family and characterized by teamwork, consensus, and participation, which makes it easier for expatriates to make

social connections. In this type of work environment, SIEs can establish friendships, which is important for foreigners living in a host country. These insights align with Haslberger et al.'s (2014) belief that interaction with people is important for both work and non-work adjustment. Moreover, we note that the work-related adjustment of SIEs could be explored in relation to new local employees. Our findings correspond with Lund's (2003) results, showing that family-relation-based culture helps new employees adjust inside an organization.

The results revealed that individual-related control variables, such as age, gender, and education, do not correlate with work and non-work adjustment. These results do not support the findings of Pinto et al. (2011), who explored assigned expatriates; however, with respect to gender issues, Selmer and Leung (2003) also did not find a relationship between gender difference

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TABLE 2 | Correlation analysis.

	1	2	3	4	5	6	7	8	9	10	11	12	13	14
1. Work Adj.														
2. Non-work Adj.	0.664**													
3. Age	0.123	0.078												
4. Gender	-0.028	-0.151	-0.165											
5. Education	0.021	0.028	0.048	-0.112										
6. Stay duration	0.156	0.225*	0.419**	-0.007	0.068									
7. Expatriate moved with (if any)	0.003	-0.006	0.422**	-0.164	-0.119	0.179*								
8. Job factors	0.546**	0.353**	0.128	0.080	0.063	0.110	-0.080							
9. Work duration	0.201*	0.123	0.564**	-0.096	0.073	0.721**	0.231**	0.271**						
10. Number of employees	0.103	0.094	0.033	-0.056	0.210*	0.033	-0.001	0.016	0.024					
11. Clan	0.403**	0.299**	-0.141	-0.015	-0.006	0.029	0.029	0.398**	-0.022	-0.200*				
12. Adhocracy	0.226*	0.063	-0.047	0.138	-0.113	0.049	-0.123	0.394**	0.067	-0.267**	0.575**			
13. Market	0.012	-0.122	-0.031	0.182*	-0.014	0.071	-0.054	0.079	-0.011	-0.090	0.022	0.410**		
14. Hierarchical	0.160	0.164	0.000	0.022	0.148	0.150	-0.032	0.148	-0.004	0.267**	0.212*	0.080	0.040	

**Correlation is significant at the 0.01 level (2-tailed).
*Correlation is significant at the 0.05 level (2-tailed).

and non-work adjustment, though they did find that female expatriates had higher levels of work adjustment than males. In relation to gender, more contradicting results could be found. Pinto et al. (2011) found that female expatriates have more non-work adjustment difficulties than male expatriates, but this does not correspond with the results of our study or the work of Selmer and Leung (2003). This difference may stem from the fact that SIEs differ from AEs in that they are more self-oriented. Also, more females recently decided to take international assignments on their own, so these gender issues could become less prevalent in the future. Nevertheless, these insights need deeper support and need to be explored in more detail in future studies.

It was also indicated that stay duration has a positive impact on non-work adjustment. This finding was unsurprising, as time spent abroad allows individuals to become more familiar with a country's culture and environment.

After analyzing work-related control variables, years spent in an organization did not predict work adjustment, which aligns with the findings of Stroh et al. (1994); however, interestingly enough, time spent in an organization was negatively associated with non-work adjustment, which calls for additional analysis that explores this issue in more detail. Finally, job factors related to role clarity and freedom at work positively contribute to work and non-work adjustment and confirm the previous findings of Black (1988) and Stroh et al. (1994).

Overall, our results highlight that Clan culture type and job factors affect the work and general non-work adjustment of self-initiated expatriates.

Theoretical Contributions

First, this study expands our understanding of SIE adjustment. It contributes to the scarce SIE management literature by investigating the understudied topic of the role that organizational culture typology plays in the adjustment process. Second, this study in relation to O'Reilly et al. (1991) research, who revealed the importance between an individual's preference for a particular culture features in P-O fit, adds primary insights that particular organizational culture such as Clan culture that is based on friendly and supportive relations and values fits SIE's values foster SIEs adjustment and fit to the organization.

Implications for Managerial Practice

This study is important from a practical point of view. Retention of employees is a serious concern for organizations. If employees do not adjust, they leave the organization, and then the organization spends extra time and money on new employee hiring, training, and adjustment. As the flow of SIEs is growing globally, their adjustment issues are becoming very important. Moreover, foreign employees are becoming a norm in both international and local organizations. As local organizations do not have deep experience and have developed procedures to employ foreign employees, they could face more problems with SIE adjustment and retention. To successfully adjust in local organizations, SIEs need support from inside the organization; however, not much research has been done exploring how human resource groups in local organizations train local managers for an influx of foreign

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TABLE 3 | Multiple linear regression predicting the degree of expatriates' adjustment abroad.

Predictors	Work adjustment			Non-work adjustment		
	Step 1	Step 2	Step 3	Step 1	Step 2	Step 3
(Constant)	3.609***	1.461*	0.513	3.781***	2.057***	1.907**
Step 1—Individual related variables						
Age	0.009	0.004	0.008	0.006	0.006	0.010
Gender	−0.033	−0.133	−0.088	−0.220	−0.318*	−0.230
Education	−0.026	−0.215	−0.185	0.003	−0.142	−0.143
Stay duration in host country	0.086	0.108	0.048	0.131*	0.218**	0.173*
Expatriate moved with (if any)	−0.126	−0.053	−0.099	−0.113	−0.063	−0.126
Step 2—Work related variables						
Job factors		0.774***	0.599***		0.576***	0.480***
Work in company duration		−0.080	−0.016		−0.170*	−0.121
Number of employees in company		0.027	0.042		0.032	0.037
Step 3—Organization culture						
Clan			0.338**			0.322*
Adhocracy			−0.085			−0.217
Market			0.102			−0.018
Hierarchical			0.022			−0.019
F	0.961	10.431***	8.420***	2.083	6.956***	5.671***
R Square	0.039	0.423	0.479	0.082	0.328	0.382
Change in R Square	0.039	0.384	0.056	0.082	0.246	0.054

Significant at *$p < 0.05$, **$p < 0.01$, ***$p < 0.001$.

employees. Based on our results, we could suggest that companies hiring SIEs should develop an organizational culture based on trust, flexibility, and high sociability. Its key features should be friendly relationships, open communication, and informality between group members. This will bring satisfaction, loyalty, and commitment to the work of employees and will increase their retention. Furthermore, SIEs influence the organizational culture of their companies, and local employees also need support and training to adapt to working within international teams to understand cultural, communication, and work-related differences. Therefore, the SIE adjustment issues should be studied more widely and expanded to all aspects of organizational existence.

CONCLUSION

The main conclusion of this study is that organizational culture type could foster the adjustment of self-initiated expatriates self-initiated at work and in their host country. The study's findings encourage the use of the P-O fit theory to explain the work adjustment of SIEs. Following the P-O fit theory's approach, we determined that the best fitting culture (i.e., the one that corresponds with SIE needs and values and helps them adjust) is Clan culture. This type of culture has a positive relation to the work and non-work adjustment of self-initiated expatriates. Moreover, the results demonstrate that organizational culture type rather than time spent in an organization influences expatriate work adjustment, which highlights the importance of this study.

Limitations and Future Research Directions

The first limitation of this research is the use of a cross-sectional design, as all variables were collected through the same questionnaire. The second limitation concerns the use of self-reported data, which may be under the influence of common method variance. To prevent this, however, we shortened the questions and the questionnaire as much as we could, but we still received a low percentage of responses. Actually, larger international samples are difficult to access and, as Shaffer et al. (2006) have noted, the response rate for expatriates is low, averaging only 15%. Therefore, this study design was considered adequate to address the research questions. Another limitation is that the survey was limited to those with access to the Internet and who self-selected to participate; however, this kind of mean is adequate, and the majority of expatriates use the Internet for their communication, especially in their home country. Consequently, we suggest that future studies use multiple data collecting methods. Our research was also limited with respect to the different periods of time that SIEs spent in their host countries. Larger samples that include respondents who spent a similar amount of time in their host country or samples that focus on fixed short-term stays could be used in future studies. This study neglected the culture of the host country, as the research focused on a world sample. Studies that center nationals from a single country who expatriated to different countries or expatriates from different home countries who reside in the same host country could be pursued in the future. We also did not test culture novelty, spouse or family adjustment, previous

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international experience, and host language skills in the current study, which should be explored in future studies.

Finally, a theoretical limitation relates to the P-O fit theory. It is limited when applied to organizational levels and work adjustment and thus could be expanded by person-environment fit theory if researching the non-work adjustment of expatriates. Moreover, other typologies of organizational culture could be analyzed in future studies.

DATA AVAILABILITY STATEMENT

The raw data supporting the conclusions of this article will be made available by the authors, without undue reservation.

AUTHOR CONTRIBUTIONS

All authors contributed to the design and implementation of the research, the analysis of the results, and the writing of the manuscript.

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RESEARCH ARTICLE

International experience of a direct supervisor–does it matter for self-initiated expatriates' adjustment?

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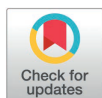
Abstract

Due to increasing global mobility flows, self-initiated expatriates (SIEs) in both employee and managerial roles are now commonplace. However, the influence of direct supervisors' international experience on the adjustment of SIEs remains underexplored. This study, grounded in signaling and similarity-attraction theories, addresses this gap through a qualitative examination of supervisors with international experience and at least one SIE under their supervision. The findings indicate that both foreign-born and locally born supervisors perceive their international experience as valuable in managing their international teams. Foreign-born supervisors, more frequently than their locally born counterparts, interpreted the uncertainty signals from their SIE employees as a reflection of empathy and open-mindedness, attributes shaped by their international backgrounds and cultural insights. Furthermore, the results suggest that all direct supervisors focus their support and actions primarily on facilitating SIEs' adjustment in the work environment, rather than in the non-work environment. This research offers theoretical and practical insights for international human resource management, highlighting the positive impact of supervisors with international experience on the onboarding and adjustment processes of new SIEs, thereby enhancing the management of international teams.

Introduction

This study addresses the growing global mobility trend and its implications for local organizations employing foreign-born employees. It focuses on self-initiated expatriates (SIEs), defined by Cerdin and Selmer [1] as individuals who voluntarily relocate to a foreign country for work without support from an employer. This research explores how the international experience of direct supervisors—whether foreign-born or locally born—affects the adjustment of SIEs working under their supervision.

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Self-initiated expatriates (SIEs) encounter many of the same challenges as newly hired employees; however, these are compounded by the need to adapt simultaneously to unfamiliar cultural, organisational, and interpersonal contexts. A key factor influencing their adjustment is the social support received in the host environment, particularly from coworkers and direct supervisors [2–4]. Among the various organisational influences on SIE adjustment, the role of the direct supervisor emerges as especially significant. Recent studies suggest that supervisors with prior international experience are better positioned to recognise and respond to the specific needs of expatriates, offering tailored support that facilitates both professional integration and psychological well-being [5]. Consequently, supervisor support is often more instrumental in fostering work adjustment than peer support, as supervisors are typically more accessible for addressing task-related queries and providing performance guidance [6,7]. Similarly, mentors with international experience have also been shown to influence expatriate outcomes positively [8].

The importance of supervisory support becomes even more pronounced when considering regional variations in expatriate experiences. For example, European SIEs in China and Turkey report differing patterns of social interaction and psychological well-being, shaped by the varying degrees of cultural distance and regional familiarity [9]. In several Asian contexts—such as China, Taiwan, and South Korea— research indicates that SIEs benefit considerably when supervisors deeply understand the host country's cultural and institutional dynamics, often informed by their own international exposure [10,11]. In sub-Saharan Africa, the presence of robust local support systems is essential for expatriate success [12,13]. While empirical evidence from Africa and Latin America remains more limited, existing studies underscore the universal relevance of culturally informed supervision. In these contexts as well, supervisors with global insight can play a pivotal role in bridging cultural divides and guiding SIEs through unfamiliar social and professional landscapes [14].

While these findings highlight the value of supervisor support, particularly when informed by international experience, there remains limited understanding of how such experience specifically shapes SIEs' adjustment processes. Although some studies suggest that supervisors with global exposure are better equipped to provide effective support [6,7,15–18], the underlying mechanisms through which this occurs remain underexplored. To address this gap, the present study investigates **how the international experience of both local and foreign-born supervisors intersects with SIEs' adjustment across work and non-work domains.**

The novelty of this study lies in its investigation of how direct supervisors interpret and act on the behaviours and uncertainty signals of SIEs. The research draws on signaling [19] and similarity-attraction theories [20] to propose that supervisors with international experience, whether foreign-born or locally born, are more attuned to the uncertainty signals of SIEs. Uncertainty signals encompass a range of verbal and non-verbal cues through which individuals convey doubt or a lack of clarity. These may include direct verbal expressions, such as questions aimed at seeking clarification, as well as non-linguistic features like hesitation, rising intonation, or speech disfluencies [21,22]. Non-verbal manifestations—such as gestures, body posture,

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and facial expressions—also play a crucial role in signalling uncertainty during interpersonal interactions [23,24]. These supervisors, recognising shared experiences, are more likely to offer support, thus facilitating SIEs' adjustment. This is particularly pertinent as global mobility flows increase, resulting in a growing number of SIEs in local workforces, which, in turn, impacts management practices.

The contributions of this study are threefold. First, the theoretical implications align with signalling theory, suggesting that while SIEs may express uncertainty, these signals are not always directed at and noted by their supervisors. Supervisors with international experience are more likely to recognise and interpret these signals regardless of their national origin. However, foreign-born supervisors are more adept at identifying and interpreting SIE uncertainty signals than locally born supervisors, though the latter tend to take more actions to assist SIEs' general adjustment. Further research is needed to explore why foreign-born supervisors, despite similar experiences, do not provide more comprehensive support.

Second, the managerial contributions of this study highlight the role of foreign-born supervisors in recognising SIE uncertainty signals and taking proactive steps to assist. A failure to recognise these signals could lead to misunderstandings, disrupting workplace dynamics. This finding underscores the importance of supervisor cultural diversity in organisations with incoming SIEs. While foreign-born supervisors may not always be familiar with working in multinational teams, they are more attuned to the adjustment challenges SIEs face, often initiating conversations or seeking HR assistance when needed.

Third, this study provides valuable insights for employers regarding managerial staffing strategies. The results demonstrate that foreign-born supervisors, with their initial connections to incoming SIEs, are more likely to reduce turnover and enhance productivity during the adjustment period. Therefore, employers should consider hiring SIEs into managerial positions to support the integration of new SIEs into the workforce. Moreover, from a practical standpoint, this research suggests that Human Resource Management (HRM) professionals need to adopt more strategic, interventionist roles, employing tools such as cross-cultural support, regular communication, and culturally diverse mentoring to help ease SIEs' transitions. Encouraging supervisors to leverage their international experience to support SIEs can facilitate smoother adjustments and increase workplace performance.

The article proceeds as follows: a theoretical framework outlining signalling and similarity-attraction theories; a review of the literature on expatriates' international experience and cross-cultural adjustment, with a focus on the supervisor-SIE relationship; a description of the methodology, including research design, data collection procedures, participant information, and data analysis; and finally, a discussion of the findings, limitations, future research directions, and practical implications.

Theoretical framework

Signaling theory

Signaling theory was first formulated by Spence [19] based on the signaling function of job applicants' education to potential employers. Since then, it has often been used to research various phenomena in business and management. The primary elements in signaling theory are the *signaler*, the *receiver*, and the *signal* itself [25]. When scholars discuss the signaler in their studies, they differentiate between credible, reliable, and inferior "cheat" signals the signaler sends [26–28]. Signaling theory scholars also emphasize the receiver's attention to the signals and their interpretation [29–31]. The studies in the management field primarily focus on signalers and receivers who are interested in the processes within the organization, including recruiters [32–34], managers [35–37], employees [38–40], and corporate headquarters and subsidiaries [41,42].

In our study, the newcomer *SIE is a signaler*. As SIEs enter a new foreign workplace, they presumably send uncertainty signals. Their uncertainty arises because they are new to the organizational culture, its requirements, and the relationships with coworkers. Therefore, they ask questions and seek assistance from their direct supervisor or coworkers. Also,

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incoming SIEs observe and try to gauge others' reactions to their behavior, appearance, or use of language. Doing so makes them most likely to send uncertainty signals by appearing too cautious or overly excited. Although the signals are not necessarily targeted at the direct supervisor, *a direct supervisor with international experience as a signal receiver* will likely notice and interpret them based on their personality and experience. Through the similarity-attraction perspective, we view a direct supervisor's international experience as driving the supervisor to pay more attention to SIE uncertainty signals and expand their scope of interpretation.

Similarity-attraction theory

Similarity-attraction theory posits that people tend to have more positive interactions with others who share similar characteristics [20,43,44]. The relationship dynamics between direct supervisors with international experience and SIEs can be influenced by their shared international experiences [20,45]. This international background provides supervisors with an additional lens through which they perceive SIEs upon joining the organization. Despite potential differences in the nature and extent of their international experiences, this shared background becomes an initial and easily recognizable point of commonality between the SIE and their direct supervisor during the early stages of their working relationship. This, in turn, should be helpful for SIEs' adjustment.

International experience and cross-cultural adjustment

International experience encompasses the various experiences gained through working, living, studying, and traveling abroad [46]. Takeuchi et al. [47] examined the impact of international experiences on assigned expatriates (AEs) and their cross-cultural adjustment. They differentiated between previous work experiences (in terms of number and length) and travel experiences. They discovered that prior international experiences do not directly cause cross-cultural adjustment but moderate it [47]. Dimitrova et al. [48] adopted a Job Demands-Resources perspective, suggesting that international experience contributes to resources like social and human capital, which can facilitate adjustment to new assignments. Grill et al. [49] highlighted that international cross-cultural experience primarily impacts the adjustment of inexperienced expatriates. However, Fenner and Selmer [50] found no significant relationship between international experience and expatriates' psychological adjustment in a study investigating expatriates' adjustment across public and private sectors.

These controversies in the literature underscore the relevance of studying the effects of international experience on SIEs. In this context, the international experience of both direct supervisors and employees can serve as a mutual understanding of the difficulties associated with living and working abroad. The argument is that the international experience of direct supervisors and SIEs can bring them closer together, enhancing SIEs' adjustment in both work and non-work environments.

Supervisor-SIE relationship

Direct supervisors play a critical role in communication and the implementation of organizational strategy [51–53], and the supervisor-employee relationship has been a longstanding focus of research. This relationship is multifaceted [54], with extensive research examining how newcomers interact with their managers. Key areas explored include socialization behaviours [55–57], leadership styles [58,59], trust and support [60–62], expectations and experiences of both newcomers and supervisors [59,63], and creativity among newcomers [64].

Self-initiated expatriates (SIEs), who enter the foreign workforce, are also newcomers to an organisation, whether domestic or multinational. These individuals bring diverse cultural backgrounds, socialisation practices, languages, and expectations, which complicate communication within multicultural teams [65]. The dynamics between supervisors and employees in these teams introduce additional challenges, likely influencing SIEs' adjustment. Existing research on supervisor-employee relationships, particularly in management and global mobility contexts, largely focuses on assigned expatriates in managerial roles [66–68] and their local subordinates [69–72].

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The role of a direct supervisor's international experience in SIEs' adjustment holds significant importance for several reasons. According to Kaur et al. [15], SIEs perceive supervisors with international experience as more reliable in fostering trust and establishing supportive interpersonal relationships, which are crucial for adjustment. Supervisors with international experience, equipped with knowledge of historical, legal, and employment contexts, are better positioned to facilitate smoother transitions and align expectations for SIEs within an organization [17]. From a human resource management perspective, hiring supervisors with international experience ensures readiness to support incoming SIEs and reduce adjustment-related challenges [16,18].

Takeuchi and Chen [46] have called for further research across different contexts to explore how the international experience of direct supervisors influences the adjustment of SIEs. This study responds to this call by investigating the impact of direct supervisors' international experience on SIEs' adjustment in both work and non-work environments, drawing on signaling [19,25] and similarity-attraction [43] theories. It is suggested that direct supervisors with international experience develop a unique relationship with subordinate SIEs, characterised by supportive attitudes and higher levels of social support, which positively influences SIEs' adjustment in both work and non-work environments.

Methodology

Research design

The study follows a qualitative research methodology [73], which uncovers deeper processes in individuals, teams, and organizations and allows researchers to understand what individuals experience and how they interpret their experiences [74]. Given the study's focus on understanding the subjective experiences and socially constructed meanings of SIEs, this research adopts an interpretivist philosophical stance [75,76]. Interpretivism is particularly well-suited for qualitative inquiry as it emphasizes contextual understanding, researcher reflexivity, and the co-construction of meaning between researchers and participants [77]. This approach allows for the exploration of complex social phenomena, such as cross-cultural adjustment, within their natural settings, where individual perceptions, meanings, and interactions are central. It supports a flexible, nuanced examination of how SIEs and their supervisors navigate cultural and institutional environments.

Procedures of data collection

For this study, 20 semi-structured interviews were conducted with direct supervisors with international experience who also met some other selection criteria: (i) being an SIE in the US for more than ten years or (ii) being locally-born but having international experience, such as engaging in extensive international activities like studying, working, or traveling abroad for extensive periods. Furthermore, all participants should have at least one SIE (i.e., a foreign worker legally employed and displaced in the US on their own initiative) under their supervision. The United States was chosen for this study as it is a multicultural country, and local organizations are more likely to hire SIEs. In this study, the United States is considered the "home country" to analyze the experiences of foreign-born or locally born supervisors with international experience outside the US, and the "host country" for the SIEs under their supervision. Following initial contact with local supervisors who had international experience through the first author's network, a snowball sampling technique was used to identify additional interviewees who met the selection criteria. Data collection was stopped when thematic saturation was achieved [73]. Purposeful sampling, with a specific focus on managers supervising self-initiated expatriates within a particular regional context, facilitated the achievement of both thematic and meaning saturation. Thematic saturation was reached when no new codes or themes emerged from the data, while meaning saturation—defined as obtaining a rich, nuanced understanding of the identified themes—was also attained. These procedures are consistent with previous research, which suggests that 16–24 interviews are typically sufficient to reach both types of saturation in qualitative studies [78]. The sample size of 20 is considered adequate to comprehensively address the research question in qualitative research with narrowly defined research objects [79–81].

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The research has been approved in accordance with Kaunas University of Technology's Description of the Procedure for Ethical Assessment of Research, as approved by the Kaunas University of Technology Rector's Order No. A-201 of 23 April 2021, and the Kaunas University of Technology Research Ethics Commission Protocol No. M4-2022-15 of 28 October 2022. The interviews, conducted from November 1, 2022, to May 31, 2023, aimed to capture the insights and perspectives of direct supervisors who could provide firsthand knowledge of managing SIEs within the US context (see the interview protocol in S1 Appendix). All interviews were conducted in English and were done by the same researcher. Interviews were conducted face-to-face or via video conference, recorded, and transcribed for analysis. Before each interview, verbal permission to record was obtained, and this permission was recorded along with the interview. Each interviewee was free to refuse to answer any question if they felt uncomfortable sharing information and to withdraw from the study at any time, during or after the interview. Also, interviewees were assured of the confidentiality and privacy of collected data. The average duration of the interview was 27 minutes.

Research participants

In this study, a cohort of 20 respondents actively participated. The age ranged from 30 to 63 years old, with ten individuals of each gender. Six respondents were locally born Americans with diverse international experiences, while fourteen were foreign-born. Furthermore, all participants had accumulated significant supervisory experience, ranging from 2 to 14 years. They all managed teams that included at least one SIE who was not of the same nationality. All foreign-born participants held undergraduate or graduate degrees in higher education, whereas half of the US-born supervisors had high school diplomas. These demographics provided a diverse and well-rounded participant pool for gathering insights on how direct supervisors with international experience manage SIEs. Information and details of the interviewees are summarised in S2 Appendix.

Inclusivity in global research

Additional information regarding the ethical, cultural, and scientific considerations specific to inclusivity in global research is included in the Supporting Information (SX Checklist).

Data analysis

MAXQDA software was used to analyze and code the transcribed interviews to ensure transparency and reliability in the coding process. A thematic content analysis was conducted, employing both inductive and deductive coding approaches [82]. A thematic coding structure was developed in multiple steps to ensure systematic analysis (presented in Fig 1). First, demographic data were coded, including gender, nationality, age group, years in the United States, years as a supervisor of a multinational team, and educational level. Second, the main thematic coding categories were developed based on the study's research questions. Third, these main themes were further subdivided into sub-themes through an inductive, data-driven approach informed by data interpretation. To support coding transparency and consistency, collaborative practices were followed as suggested by Ortloff et al. [83]. All coding decisions were discussed among all co-authors, and any discrepancies in interpretation were resolved through consensus. This collaborative process also ensured analyst triangulation, enhancing the trustworthiness of the findings. The lead author's extensive experience working with and supervising SIEs within the U.S. context supported the initial data interpretation.

Following the development of main themes, all authors reviewed and refined the coding, resulting in an agreed-upon final code list [84]. This collaborative approach strengthened the reliability and validity of the qualitative analysis. The grouping was based on the facets of the Black et al. expatriate adjustment model, which includes work adjustment, general adjustment, and interaction adjustment [85]. Following, an additional categorisation was introduced, distinguishing between adjustments in work and non-work environments [85,86].

In line with the interpretivist paradigm underpinning this study, the positionality of the researchers and the reflexive nature of qualitative inquiry are acknowledged. Given varying degrees of intercultural experience and familiarity with
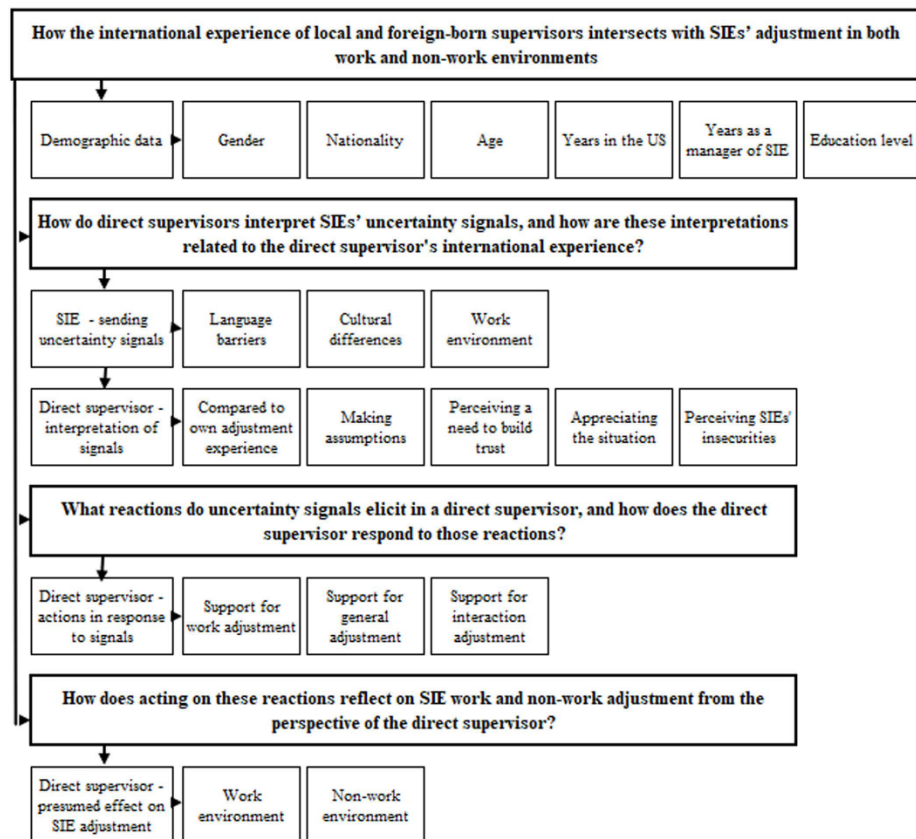
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Fig 1. Thematic coding structure.

expatriate contexts, the researchers were positioned not as detached observers but as active participants in the co-construction of knowledge. Interpretations were shaped by cultural backgrounds, disciplinary training, and pre-existing assumptions concerning global mobility and adjustment. To address this, continuous reflexivity was embedded throughout the research process, particularly during data collection and analysis, to examine critically how researcher perspectives may have influenced participant interactions and the interpretation of narratives. The use of reflective field notes and peer debriefings contributed to the mitigation of potential biases and supported the credibility and transparency of the study's findings.

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Findings

The following key findings distinguish between two main categories of supervisors, all of whom possess international experience: (i) those born abroad, and (ii) those of local origin who have gained such experience through studying, working, or residing for extended periods in foreign contexts. In each table, the numeric data refers to the total number of respondents and references, organized in descending order. Several subsidiary questions were developed to explore the main research question: How does the international experience of a direct supervisor influence the adjustment of self-initiated expatriates (SIEs) in work and non-work environments?

How do direct supervisors interpret SIEs' uncertainty signals, and how are these interpretations related to the direct supervisor's international experience?

Table 1 presents the main uncertainty signals that the foreign-born and locally born direct supervisors observed, which we grouped into three categories: language barriers, cultural differences, and work environment.

One of the most frequently observed uncertainty signals noted by all supervisors was *poor English language skills*, identified by 13 participants. The US is an English-speaking country, and English is the official business language; therefore, newcomers are expected to have sufficient English proficiency to communicate effectively. Therefore, most incoming SIEs are learning English as a second language, which may lead to initial communication challenges. The results confirm that:

"English is not their first language, so conveying information to them can be difficult. It seems they understand English well, but trying to get it out and that <> colleagues would understand, you know, can be difficult." (Participant 8, locally born)

Another uncertainty signal observed was the *behavior of SIEs*, which ten supervisors noted. This behavior often distinguishes SIEs from local employees, particularly when multiple individuals from the same nationality are present.:

Table 1. The codes of the main uncertainty signals observed by the direct supervisor.

Uncertainty signals	Foreign-born supervisors		Locally-born supervisors	
	Individuals reporting the reference	Number of references made	Individuals reporting the reference	Number of references made
Language barriers				
Poor English language	8	12	5	7
Thick accent	3	6	0	0
Cultural differences				
Behavior	8	12	2	2
Appearance	2	4	0	0
Food	1	1	1	1
Work environment				
Work ethic	8	14	3	6
Organizational culture	4	7	0	0
Complaints of inequality	1	4	0	0
No basic understanding of work processes	1	1	0	0

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"In some cultures, I can see that cult mentality. They group, they keep secrets and information, and that is definitely there." (Participant 6, foreign-born)

Another signal noted by both foreign-born and locally born supervisors (11 participants) was that, generally speaking, most SIEs exhibit *strong work ethics* with only a few exceptions:

"In general, immigrants have a stronger work ethic, maybe because of the countries they come from. <…> Based on my experience, immigrants I have hired and supervised have had a strong work ethic." (Participant 2, foreign-born)

This study reveals that supervisors with international experience, especially foreign-born supervisors, are more likely to recognize uncertainty signals from incoming SIEs. Locally born supervisors identified fewer uncertainty signals than their foreign-born counterparts, suggesting that foreign-born supervisors were more attuned to the challenges of SIEs.

Table 2 depicts how direct supervisors interpret uncertainty signals coming from SIEs. Five main themes were identified: comparing one's own adjustment experience, making assumptions, perceiving a need to build trust, appreciating the situation, and perceiving SIEs' insecurities.

One of the most notable interpretations made by foreign-born supervisors is *comparing their own adjustment experiences* (as reported by 8 respondents). Based on that, all participants recognized the warning signals of SIEs' need for assistance or support for their adjustment, either in the work or non-work environment:

"I have an empathy for folks that are immigrants over here, just having gone through it myself, I think a lot of the challenges are very similar with immigrants." (Participant 5, foreign-born)

Another interpretation, mainly by foreign-born supervisors, was making assumptions by *generalizing individuals' behavior toward nationalities* (9 interviewees):

"<…> I have also been in nursing school with Nigerian nurses who were learning to be nurses. Some of them were okay, but most of them had unappealing personalities. There have been multiple instances where items were not completed for the next shift. <…> [Next time] somebody else comes in, and you can see that they are also from that region, and right away, you think, 'OK.' Hopefully, it will be a better day. (Participant 13, foreign-born)

In addition, only foreign-born supervisors voiced the *insecurities* that SIEs face (4 participants):

Table 2. The codes of the direct supervisor's interpretation of signals.

Topics of interpretation	Foreign-born supervisors		Locally-born supervisor	
	Individuals reporting the reference	Number of references made	Individuals reporting the reference	Number of references made
Compared to own adjustment experience	8	18	1	2
Making assumptions				
Generalizing toward nationalities	8	15	1	2
Noticing biases because of different cultures	6	9	2	4
Perceiving a need to build trust	6	9	3	3
Appreciating the situation				
Appreciation from the direct supervisor	6	7	2	3
Appreciation from SIE	1	1	1	1
Perceiving SIEs' insecurities	4	4	0	0

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"Asking for stuff and asking for help are also issues. When people do not know how to ask for help or are afraid to ask for help due to a language barrier, they often feel that their skills are lacking. (Participant 13, foreign-born)

The results highlight that many foreign-born supervisors generalize their experiences (positive or negative) with a particular individual, attributing them to their nationality and projecting that generalization toward workers from the same origin. It may stem from their own experience as foreigners, where they recognize that they are different from locals; therefore, they attribute other people's differences to their country rather than individuality. Additionally, foreign-born supervisors are more likely to recognize biases that stem from different cultural backgrounds. More research is needed to understand why foreign-born supervisors are more judgmental than locally born direct supervisors and why they feel insecure in the US despite having achieved substantial careers there. The following questions arise: Do foreign-born supervisors have preconceptions that any deviation from behavioral norms must be attributed to cultural differences? Do locally born supervisors, despite having international experience, exhibit fewer cultural preconceptions and biases, or are they less forthcoming about this in interviews?

Additionally, participants highlighted distinct cultural groups, such as Asians or Europeans, and separate countries, including Eritrea or France. It is unclear whether the direct supervisors' observations of SIEs from different nations on the same continent would differ if few were on the same team. Additionally, we have not identified a pattern indicating which group of participants generalized their SIEs by continent versus country. More research is needed to analyze the generalization factors.

Foreign-born direct supervisors provided a wider variety of interpretations than locally born direct supervisors, highlighting that direct supervisors who immigrated and had to adjust are more attuned to the SIEs' adjustment issues than those with no firsthand experience.

What reactions do uncertainty signals elicit in a direct supervisor, and how does the direct supervisor respond to those reactions?

Table 3 illustrates the direct supervisors' actions in response to interpreting the SIEs' uncertainty signals, thereby supporting their cross-cultural adjustment. We grouped the results into three categories of support for SIEs' adjustments: work, general, and interaction adjustments.

Table 3. The codes of the direct supervisor's actions in response to uncertainty signals.

Actions in response to uncertainty signals	Foreign-born supervisor		Locally-born supervisor	
	Individuals reporting the reference	Number of references made	Individuals reporting the reference	Number of references made
Support for work adjustment				
Training help	5	6	2	3
Helping with work situations	4	5	2	2
Motivating, encouraging	2	3	1	1
Support for general adjustment				
Mentoring	3	3	2	2
Making efforts to improve SIE confidence	2	2	1	1
Support for interaction adjustment				
Making efforts to understand SIE better	6	9	4	5
Making efforts to improve communication	3	5	0	0
Getting to know SIE better	2	2	2	2

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Supervisors' actions to support SIEs' work adjustment primarily manifest in *training help* (7 participants). This result is not surprising and may not be directly related to international experience, as a supervisor's primary function at work is to train incoming employees to perform their duties effectively.

"One of them had a lot more issues that we had to purchase a special program for her to check her spell check because she could just not do it." (Participant 1, foreign-born)

Only five direct supervisors noted that they advise on general adjustment. They mostly see themselves *as mentors to* their SIEs. As the supervisory function is work-related, the results were not surprising:

"Give them advice on things, show them how things work financially in America, how to build their credit. Stuff like that. Like housing. (Participant 11, locally born)

All direct supervisors paid close attention to facilitating interaction adjustments. However, only foreign-born supervisors have noted *efforts to improve communication* (3).

"I can adjust my own personal communication style based on where people are coming from. Speak more directly to some people. That is one way. So, just adjusting the communication style is one way." (Participant 15, foreign-born)

All participants, foreign-born and locally born, were more actively listing their actions to support SIEs in work and interaction adjustments rather than general adjustments. All direct supervisors understand the responsibility of training and integrating incoming SIEs into the team, ensuring that work and interactions within the international team result in the expected performance. However, only foreign-born supervisors adjusted their communication style to achieve better communication with SIEs.

The expectation was that foreign-born supervisors would have provided more guidance to their SIEs to support their general adjustment, given the similarity of their experiences in foreign countries. That was not observed in this research: supervisors from both groups mentioned very few examples of their actions to support SIEs' general adjustment. One reason might be that the SIE or supervisor is uncomfortable discussing personal matters in the work environment, especially with someone in a higher-level position.

How does acting on these reactions reflect on SIE work and non-work adjustment from the perspective of the direct supervisor?

Table 4 presents the views of direct supervisors regarding their contributions to SIE's adjustment. The results are grouped into two dimensions: work and non-work environment.

With regard to SIEs' adjustment in the work environment, seventeen direct supervisors reported that their international experience enhances their understanding of SIEs, improves communication, facilitates conflict resolution, and contributes to a greater sense of workplace integration for SIEs:

Table 4. The codes of the direct supervisor's presumed effect on SIE adjustment.

Direct supervisors' effect on SIEs' adjustment	Foreign-born supervisor		Locally-born supervisor	
	Individuals reporting the reference	Number of references made	Individuals reporting the reference	Number of references made
Work environment	13	17	4	8
Non-work environment	3	5	2	5

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"I can guide them, I guess, more effectively and provide some of the methods and solutions that I have employed before for them to test it out to see if they would work for them as well." (Participant 5, foreign-born)

Only five direct supervisors noted that their advice and guidance might assist SIEs in their adjustment to a *non-work environment*:

"he wants to own his own home one day and provide for things like that. So that is how I like, give them advice on things like that, but never like how to behave like he." (Participant 11, locally born)

The results show that foreign-born and locally born direct supervisors implied that they might affect SIEs' adjustment more frequently in the work environment than in non-work environments.

Discussion

Drawing on signaling [19,25] and similarity-attraction theories [20,43] this exploratory study investigated how the international experience of foreign and locally born direct supervisors intersects with and influences the adjustment of SIEs in work and non-work environments.

The findings indicate that supervisors perceive their international experience as a powerful tool to help them better understand the adjustment challenges of incoming SIEs. All participants reported noticing uncertainty signals from SIEs due to their international experience. However, locally-born supervisors with international experience were less attuned to those signals than foreign-born supervisors. This aligns with signaling theory research, which states that not all recipients interpret signals similarly [87–89]. Therefore, locally born direct supervisors with international experience might have noticed the signals but did not recognize them as uncertainty signals. On the other hand, why is the international experience of locally born supervisors insufficient to make them equal recipients of uncertainty signals? Why are they less perceptive? The scientific literature analyzed types of international experience based on the number of experiences [90,91], length [92,93], or international education [94]. Each influences individuals' attitudes, behaviors, values, and knowledge [95]. However, people interpret situational cues depending on several factors, including past experiences [96]. Therefore, as locally born direct supervisors lack the migration experience of foreign-born supervisors, this may explain why they are less perceptive in interpreting uncertainty signals. This is also consistent with the similarity-attraction theory [20,43]. It posits that perceived similarity fosters attraction, leading to positively biased decisions and evaluations [97]. The results highlight the distinctive knowledge of foreign-born supervisors regarding cultural and regulatory differences between their home and host countries [98]. This knowledge makes them more confident in their ability to manage incoming SIEs and support their adjustment to the workplace.

Howe-Walsh and Schyns [99] emphasize that direct supervisors play a crucial role in implementing HR policies and should be provided with various support strategies for working with SIEs. Our research suggests that the reverse may also be true: direct supervisors with international experience, especially foreign-born supervisors, can be valuable resources for HR professionals in developing strategies to support and facilitate the adjustment of incoming SIEs in local organizations.

Foreign and locally born direct supervisors were similarly engaged in actions that supported SIEs' work and interaction adjustments. However, they were much less engaged in supporting SIEs' general adjustment. In addition, the results indicate that direct supervisors consider themselves more effective in facilitating SIEs' adjustment in the work environment than in the non-work environment. Existing research provides several explanations for this phenomenon. Haslberger et al. [100] observed that direct supervisors typically refrain from involvement in subordinates' personal matters, as non-work adjustment is perceived to fall outside their sphere of influence, control, or responsibility. Since SIEs join organisations to fulfil specific professional roles, supervisors tend to focus on their adjustment within the workplace, ensuring that they

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can effectively perform their tasks and promptly contribute to overall organisational performance [101]. As argued by Lazarova and Cerdin [102], although cultural integration and social adjustment are important for long-term retention, most organisations prioritise short-term performance objectives. Consequently, direct supervisors are under pressure to ensure incoming SIEs concentrate on work-related aspects, leaving broader integration and adjustment efforts to the individuals themselves. Furthermore, Tharenou [98] noted that SIEs are often perceived as more self-sufficient and independent than corporate expatriates, given that they have voluntarily relocated. As a result, supervisors may not recognise the extent to which SIEs require support in the non-work environment. More research would be beneficial, as foreign-born supervisors often have their own experiences with general adjustment and can guide new SIEs. On the other hand, locally born supervisors living in the country have local experience and may present more options for SIEs to choose from during their general adjustment.

The results suggest that foreign-born supervisors are more likely to exhibit stereotyping than locally-born supervisors. It is unclear why stereotyping or attributing biases appear prevalent among foreign-born supervisors in this research. As foreign-born supervisors are from different cultural groups than locally born supervisors and are considered a minority, they may initially view other SIEs as representatives of another cultural group, unconsciously differentiating themselves from them while generalizing them as outsiders. Berry [103] suggested that those who integrate deeply into a host country's society and culture might distance themselves from "outsiders" to avoid being associated with them. This also aligns with social identity theory [104], which suggests that individuals tend to view themselves and others in different categories, leading to ingroup favoritism and outgroup differentiation. Therefore, if supervisors consider themselves assimilated host-country professionals, they might stereotype the incoming SIEs as 'outsiders' and prefer not to assist them with their adjustment. On the other hand, if supervisors identify themselves with expatriates, they, based on their own experience, may assume that incoming SIEs will struggle with adjustment and need assistance. Moreover, if supervisors had difficulties with their adjustment in the past, some may experience a contrast effect [105], expecting incoming SIEs to endure the same struggles without offering them much assistance. Stereotyped behavior might also be a product of confirmation bias [106], suggesting that previous negative experiences with supervising SIEs might have led some direct supervisors to overgeneralize the challenges they faced, assuming the incoming SIEs would fail to integrate into the new organizational culture, struggle with workplace norms, or lack the commitment to fully adjust. Further research may be beneficial to clarify this issue.

Limitations and suggestions for future research

This study presents the views of direct supervisors with diverse international experiences and their perceptions of themselves as better equipped to manage and guide SIEs on their teams within the US context. However, this study has several limitations. First, most participants worked in the San Francisco Bay Area, considered the world's sixth most culturally diverse population [107]. Therefore, research with samples from other areas of the US and other countries may reveal different perspectives on the importance of direct supervisors' international experience. Moreover, comparative studies involving participants from different regions or across multiple regions could help to assess cultural differences in SIE-supervisor-SIE-employee dynamics and provide a more comprehensive understanding of the impact of direct supervisors' international experience on the adjustment of SIEs.

Secondly, as the Bay Area is a metropolitan region, studies involving participants from rural areas may produce different findings regarding stereotyping and the distinct characteristics of work and non-work environments. Moreover, comparative studies examining the rural vs urban adjustment contexts for SIEs might lead to additional insights in the field.

Thirdly, participants emphasize separate cultural groups, such as Asians or Europeans, and separate countries, like Eritrea or France; therefore, research concentrating on SIEs from a specific cultural group or country might yield notable results.

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Fourth, all study participants have some international experience; however, many direct supervisors in the local workforce generally have no international experience. Comparative research with supervisors without international experience to serve as a control group may reveal the similarities and differences in perceptions, yielding meaningful and valuable insights.

Fifth, this study presents a one-sided perspective, focusing solely on the direct supervisor. Dyadic research incorporating both perspectives of self-initiated expatriates (SIEs) and of their direct supervisor would offer a more comprehensive understanding of their adjustment in both work and non-work environments. Additionally, a multi-perspective approach could reveal not only shared perceptions of the impact of supervisors' international experience but also potential differences in how each group interprets and understands these effects.

Finally, this study did not distinguish participants based on occupation or industry. Future research focusing on specific occupations or industries may provide alternative perspectives and reveal variations in the applicability of the findings. A comparative analysis of direct supervisors' international experience across different sectors (e.g., manufacturing versus services) could offer deeper insights into the specific challenges and dynamics of SIEs' adjustment.

Theoretical contributions

This study presents an original analysis of the international experiences of foreign and locally born direct supervisors. To the best of the authors' knowledge, this is the first empirical study to investigate how the international experience of a direct supervisor affects the adjustment of incoming SIEs. The results revealed direct supervisors' inclinations towards assisting SIEs in adjusting to the workplace, thereby uncovering a research gap that requires further attention from international human resource management researchers. This study paves the way for future research to delve deeper into this area, notably by addressing a few unanswered questions: (i) What are the differences between direct supervisors' effect on SIEs' work and non-work adjustment in metropolitan and rural areas of the US, different US states, or different countries? (ii) What are the similarities and differences between direct supervisors' perceptions, interpretations, and actions upon uncertainty signals when all SIEs are of the same nationality as their direct supervisor, compared to when all SIEs are of the same nationality but the direct supervisor is of a different nationality? (iii) How would direct supervisors without international experience detect, interpret, and respond to SIEs' uncertainty signals compared to direct supervisors with international experience? (iv) What are the similarities and differences in the effect of direct supervisors on SIE adjustment when the direct supervisor is from upper management versus a first-line supervisor?

Secondly, the results underscore the importance of uncertainty signals detected by direct supervisors, manifested in SIEs' behavior, appearance, and actions in the new environment. Often unintentional and not directed to the supervisor, these signals can provide valuable insights into the SIEs' adjustment process. The study aligns with signaling theory [19,25], indicating that the interpretation of the signals depends on the receiver. Foreign-born supervisors were more likely to notice uncertain signals and provide more interpretations of various signals than locally born supervisors, even though they also had some international experience. This highlights the unique application of signaling theory [19,25] in specific circumstances, which is more clearly understood in conjunction with similarity-attraction theory [20,43]. Drawing on their unique international experience, foreign-born supervisors often find SIEs more relatable and attractive. This shared background fosters greater support for SIEs, making them appear more approachable.

Managerial contributions and recommendations for practice

This study advances our understanding of self-initiated expatriates' (SIEs) interactions with local supervisors and their adjustment. It offers valuable insights for US employers, HRM professionals, foreign and locally born supervisors, and SIEs themselves.

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For US employers, the findings underscore an undeniable trend: the increasing diversity of the workforce, which now includes a growing number of SIEs in supervisory and managerial roles. This emerging talent pool contributes significantly to the local economy, yet it also necessitates changes in recruitment, integration, and ongoing management practices. While local employees are expected to be familiar with local values and workplace regulations, such assumptions should not extend to foreign-born supervisors and employees. This calls for an initial effort in providing information and fostering acculturation, without undermining foreign workers' valuable skills, such as knowledge of different cultures (and languages), a strong sense of agency, and work ethics. Building a cohesive yet diverse workforce is both a requirement and a worthwhile investment for organisations.

The findings also highlight the need for a more proactive and strategic role for HRM professionals. Locally managing an internationally diverse workforce requires additional HRM tools, including regular communication, cross-cultural support, training, and culturally diverse mentoring. HR professionals should first acknowledge the unique challenges faced by incoming SIEs and provide them with practical examples of different approaches to managing changing dynamics within teams.

For local supervisors, the findings serve as a cautionary note regarding the potential impact of stereotypes about foreign nationals on their attitudes and behaviours towards foreign-born workers. Despite efforts to adopt a personalised approach, such supervisors may inadvertently overlook foreign employees' challenges, including their unique strengths. This could increase team friction, ultimately affecting individual and team performance.

For foreign-born supervisors, the findings reinforce the importance of recognising signs of misadjustment and well-being issues among other SIEs. Supervisors are encouraged to take proactive steps rather than neglect or minimize these signs, leveraging their international experience to support SIEs and foster a more inclusive and high-performing work environment.

Lastly, for SIEs working in the US, the findings present both disheartening and optimistic perspectives. On the one hand, the results confirm what many SIEs already feel: the lack of support for their misadjustment and ill-being, particularly if they do not communicate these challenges clearly. On the positive side, the study also highlights that those who have previously experienced similar challenges are the most likely to empathise with SIEs' difficulties and provide meaningful support. These individuals, even in supervisory or managerial roles, can offer valuable assistance. This agency, in turn, leads to greater inclusivity, support, and smoother work adjustment for SIEs.

Conclusion

The primary purpose of this exploratory study was to understand how the international experience of local and foreign-born supervisors intersects with SIEs' adjustment in both work and non-work environments. Drawing on signaling [19,25] and similarity-attraction theories [20,43], a qualitative study was conducted with 20 direct supervisors with varied international experiences and at least one SIE. The results show that direct supervisors consider their international experience an additional tool for managing their international team and assisting SIEs under their command in adjusting to the work environment. The findings further revealed that foreign-born supervisors detect more uncertainty signals from SIEs and provide broader interpretations based on their international experience and their similarity with incoming SIEs. Participants noted that they are more open-minded, observant, and considerate towards SIEs because they are more knowledgeable about different cultures and personal migration experiences than their work colleagues; therefore, they are better equipped to assist incoming SIEs during their adjustment challenges.

As migration increases, more SIEs are entering local organizations. The study indicates that when these employees have foreign-born supervisors with international experience, their adjustment process is notably smoother, enabling them to integrate and contribute to the organization more effectively and in a shorter timeframe.

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Supporting information

S1 Appendix. The interview protocol.
(DOCX)

S2 Appendix. General information about participants in the study.
(DOCX)

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CURRICULUM VITAE AND DESCRIPTION OF CREATIVE ACTIVITIES (CV)

Irma Baneviciene
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Education:

1987 – 1992	UNIVERSITY DIPLOMA, MATHEMATICS TEACHER	
	Vilnius Pedagogic University, Lithuania	
1994 – 1996	MASTER OF SCIENCE, MANAGEMENT OF EDUCATION	
	Kaunas University of Technology, Lithuania	
2009 – 2013	ASSOCIATE IN ARTS, BUSINESS/ACCOUNTING	
	Peralta Colleges, CA, USA	
2019 – 2021	ASSOCIATE IN ARTS, BUSINESS MANAGEMENT AND SUPERVISION	
	Peralta Colleges, CA, USA	
2020 – 2025	DOCTORAL STUDIES, BUSINESS MANAGEMENT	
	Kaunas University of Technology, Lithuania	

Professional experience:

1992 – 2003	Mathematics and Physics Teacher, School Principal
	Various secondary schools of Kaunas city and county, Lithuania
2004 – 2020	AP Supervisor
2020 – 2021	AP Team Supervisor
2021 – 2024	Assistant Manager, AP
2024 - now	Accounts Payable Manager
	Grocery Outlet Inc., Emeryville, CA, USA
2022 – now	Junior Researcher
2025 – now	Associate Professor (Practitioner)
	Kaunas University of Technology, Lithuania

Areas of research interest:

International Human Resource Management: This includes topics like international migration, expatriation processes, and the adjustment of international employees.

International Migration: This involves studying the motivations and reasons for international migration, self-initiated expatriates, and the role of universal values in migration cultures.

Scientific papers related to the topic of the dissertation:

1. Baneviciene, Irma; Andresen, Maike; Kumpikaite-Valiuniene, Vilmante. Assessing the status quo of international employees' adjustment research, 1990–2022: a review and future research agenda // Humanities and social sciences

communications. London: Springer Nature. ISSN 2662-9992. eISSN 2662-9992. 2024, vol. 11, iss. 1, art. no. 633, p. 1-20. DOI: 10.1057/s41599-024-03098-y

2. Kumpikaitė-Valiūnienė, Vilmantė; Leišytė, Liudvika; Rose, Anna-Lena; Duobienė, Jurga; Duoba, Kęstutis; Alas, Ruth; Banevičienė, Irma. Factors influencing expatriates' adjustment in Estonia and Lithuania // International journal of intercultural relations. Oxford: Elsevier. ISSN 0147-1767. eISSN 1873-7552. 2024, vol. 100, art. no. 101967, p. 1-15. DOI: 10.1016/j.ijintrel.2024.101967. 3. 1.

3. Kumpikaitė-Valiūnienė, Vilmantė; Žičkutė, Ineta; Banevičienė, Irma; Gao, Junhong; Torres, Denisse. The impact that different types of organizational cultures have on the adjustment of self-initiated expatriates // Frontiers in Psychology. Lausanne: Frontiers Media. ISSN 1664-1078. 2022, vol. 12, art. no. 804947, p. 1-10. DOI: 10.3389/fpsyg.2021.804947.

4. Baneviciene I, Pinto LH, Kumpikaite- Valiuniene V (2025) International experience of a direct supervisor–does it matter for self-initiated expatriates' adjustment? PLoS One 20(6): e0326848. https://doi.org/10.1371/journal.pone.0326848

Scientific conferences:
1. Irma Baneviciene. "The role of line manager in migrant employees' adjustment process in the context of local organizations" EURAM Doctoral Colloquium, 14-15 June 2021, ONLINE

2. Irma Baneviciene, Vilmante Kumpikaite-Valiuniene. "Effect of the Direct Supervisor's Migration Experience on His/Her Attitude towards Self-Initiated Expatriate", 2nd International Conference on Self-Initiated Expatriation, 11-12 April 2022, Bamberg, Germany, ONLINE

3. Irma Baneviciene, Vilmante Kumpikaite-Valiuniene. "How Digital Transformation Affects International Employee Adjustment: Literature Review", MakeLearn & TIIM International Conference, 19-21 May 2022, Kaunas, Lithuania, ONLINE

4. Irma Baneviciene, Vilmante Kumpikaite-Valiuniene. "A Bibliometric Analysis of International Employees' Adjustment Research Published from 1990 to 2021" EURAM Conference, 15-17 June, 2022, Winterthur, Switzerland

5. Irma Baneviciene. "The Effect of Supervisor's Different International Experiences on International Employee Adjustment in Organization" Doctoral Student Consortium at AOM, 7 August 2022, Seattle, USA

6. Irma Baneviciene, Vilmante Kumpikaite-Valiuniene. "International Employees' Adjustment Research: Retrospective Overview Using Bibliometric Analysis", 82nd Annual Meeting of the AOM, 5-9 August 2022, Seattle, USA

7. Vilmante Kumpikaite-Valiuniene, Deividas Kacinauskas, Irma Baneviciene. "Direct Supervisor's Support for the Expatriate at Different Stages of Expatriation", The 16th International HRM Conference, 28-30 June 2023, London, United Kingdom

8. Irma Baneviciene, Vilmante Kumpikaite-Valiuniene, Luisa Helena Pinto. "Previous International Experience of a Direct Supervisor – Does It Matter for International Employees' Adjustment?", The 16th International HRM Conference, 28-30 June 2023, London, United Kingdom