

Towards effective management of expatriate spouses.

by Betty Jane Punnett

Companies with international linkages often find it necessary to use expatriates for a variety of reasons, and the success of these expatriates is frequently critical to the success of the project on which they are working. Many of these companies could potentially benefit from including the spouse in the expatriation process. For example, about 15% of expatriate candidates were reported to have rejected a foreign assignment because of their spouse's career, and this is expected to be a growing reason for rejection, especially in North America and Western Europe. This may also be true in other parts of the world, because of an increasing number of working women, and women with careers, in all parts of the world. Substantial research has indicated that spouses are particularly important to the success of the expatriate process, but, surprisingly, there is little research that looks at the expatriate process from the spouse's viewpoint. This is especially true for spouses with a career and with male spouses; little is known of their situation and concerns. This paper draws on a series of research projects that do address the spouse's viewpoint to suggest practical means by which companies can improve the expatriation process by including the spouse.

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The performance of any expatriate while abroad has major implications for the organization. Various authors have estimated the cost of an expatriate failure - from losses between US\$150,000 and US\$200,000 for each failed expatriate; further, Copeland and Griggs (1988) estimated that U.S. firms lost \$2 billion a year in direct costs due to expatriate failures, and they assumed the damage to company reputation as "frightening." At the same time, according to Solomon (1994a) the Hudson Institute's Workforce 2000 and the Harvard Business Review's Global Workforce 2000 suggest that global mobility is a reality and a necessity in today's global business environment. Together these factors suggest that companies need to pay close attention to developing policies to ensure expatriate success. While much of the research on expatriates has focussed on U.S. firms, it seems that firms from around the world face the same issues when they have international linkages that make it necessary to use expatriates; that is, the success of these expatriates is frequently critical to the success of the project on which they are working.

Canadian HR Reporter (1997) cited a 1994 Foreign Trade Council report that found that 80% of employees who refused international positions did so for family reasons and David Weeks (1993) reported that about 15% of U.S. (and 16% of non-U.S.) expatriate candidates reject foreign assignments because of their spouses' careers. A spouse's career is expected to be a growing reason for rejection, especially in North America and Western Europe because of women's increased workforce participation. This may also be true in other parts of the world, because the number of working women, and women with careers, is growing in much of the world. Research has also indicated that spouses are particularly important to the success of the expatriate process. Surprisingly, in view of this, there is

little research that looks at the expatriate process from the spouse's viewpoint; especially the spouse with a career or the male spouse.

Issues associated with expatriate success have been addressed by scholars for more than a decade (Black, 1990; Black & Gregersen, 1991; Black, Mendenhall & Oddou, 1991; Black & Stephens, 1989; Mendenhall & Oddou, 1985; Takeuchi & Hannon, 1995; Tung, 1982, 1988). Consistently, the role of the spouse has been identified as important in successful expatriation; for example, Black & Stephens (1989) identified a significant correlation between the adjustment of the spouse and that of the expatriate, both of which were positively correlated with the expatriate's intentions to stay rather than return early. In spite of the evidence of the importance of the spouse, relatively few companies pay particular attention to the spouse when making expatriate decisions; for example, Canadian HR Reporter (1997) reported that Noranda, a large Canadian mining company would begin offering spousal cross-cultural training for the first time in the Spring of 1997. A survey of U.S. firms by International Orientation Resources confirmed the lack of attention to spouses, reporting that only 21% of companies include spouses in preselection interviews (reported by Solomon, 1994b). This number is probably higher than for the more general population of expatriates because Fortune 500 companies were surveyed; these companies have substantial global experience and may have developed effective expatriate practices.

The importance of the spouse complicates the expatriate decision for both the company and the expatriate, because including the spouse in selection, training and support adds time and costs to the expatriation process. The evidence suggests, however, that the benefits may substantially outweigh the costs. The benefits derive from a spouse who adjusts successfully and consequently

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contributes positively to the expatriate's adjustment and performance, and may play a positive role in helping other expatriate spouses to adjust successfully. The costs include the most obvious direct costs associated with an international move, as well as a host of other costs resulting from a failed assignment. Among these other costs are lost business in the foreign location, negative public relations, dissatisfaction among foreign employees and managers, and psychological damage to the expatriate and the family, possibly resulting in medical expenses and poor performance back home (Naumann, 1992; Tung, 1988). If firms assess these costs critically, they will recognize the importance of dealing with spousal adjustment in the expatriation process.

The role of the spouse is especially important with the growing number of women seeking expatriate positions, and because of the increased likelihood that both spouses will have careers. This trend appears to be present in many parts of the world, and results in spouses who intend to work in foreign locations but may have difficulty finding meaningful work. A lack of meaningful work puts additional stress on the spouse and consequently the expatriate. Even the United Nations has been concerned with this issue in terms of foreign postings of government employees and, in particular, their spouses.

Workforce - (formerly Personnel Journal, 1994), in a series of articles on expatriates, identifies some companies that are implementing policies for dealing with expatriate spouses. Companies reported to have established spousal assistance programs include Eastman Chemical Company, KPMG Peat Marwick, Monsanto, Motorola and Quaker Oats.

Spousal assistance programs include assessment of the spouse in the selection phase, provision of language and cultural training, pre-assignment visits to the foreign location, and support groups to help the spouse adjust, as well as monetary benefits to assist the spouse in finding productive activities in the foreign location. In addition, a number of human resource executives with whom the author has discussed the issue have indicated recognition of the need to develop more effective programs.

The purpose of this study is to provide practical suggestions which companies can implement to improve their expatriation process. The expatriation process refers to the complete set of activities involved in sending an employee on a foreign assignment. The study draws on the author's studies of dual-career couples internationally (Punnett, Crocker & Stevens, 1992), expatriate wives in Ireland (Moore & Punnett, 1993), and Canadian government expatriates and their spouses, as well as the work of others (Black & Gregersen, 1991; Franke &

Trotman, 1996; Fukuda & Chu, 1994; Hannon & Takeuchi, 1996; Stewart, 1995). All of these work suggests that the issue of spousal adjustment should be an integral part of a company's expatriation process. This work is used to develop specific suggestions for companies for including the spouse in the expatriation process.(1)

A REVIEW OF THREE STUDIES

A series of three studies, completed by the author over the past four years, on expatriate spouses and their views and concerns regarding the expatriate experience, including spousal career issues, serve as the basis for many of the suggestions made in this paper. The following summarizes the three studies:

* Study #1. A small group of human resource executives (n = 15), and a small number of women expatriates (n = 23) and male spouses (n = 7) were interviewed in depth in the field. While the number of interviews for each group is small, there are relatively few women expatriates and male spouses, and the exploratory nature of the project meant that a few in-depth interviews could provide the basis for designing the more broadly-based surveys carried out in Study #2 and #3. The focus of this study was on dual-career couples and the special concerns of male expatriate spouses. The purpose of the interviews was to identify a variety of expatriate spousal concerns, and to develop a list of activities which companies could undertake as part of the expatriate process to improve the male spouse's foreign experience (see Punnett et al., 1992 for details). Companies interviewed included large accounting/consulting practices and manufacturing firm; confidentiality was assured therefore specific firm names are not used in reporting results.

* Study #2. Members of a spouse-support group in Limerick, Ireland participated in four informal focus groups (n = 11) to discuss the project and make suggestions regarding important issues to explore. The results of Study #1 were used as the basis of the focus groups, and a questionnaire-survey was developed following the focus groups. This was pre-tested with a small group of expatriates and spouses, then a mail survey of expatriates and their spouses in Limerick was conducted. The expatriate respondents were all male (n = 24), and the spouses all female (n = 25). The purpose of the study was to evaluate the importance of various spousal concerns and to rate the importance of the various activities for spouses which could be included as part of the expatriate package (see Moore & Punnett, 1993 for details).

* Study #3. Canadian expatriate government personnel and their spouses, currently in foreign assignments were surveyed by mail, using the questionnaire developed in

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Study #2, 111 expatriates and 89 spouses responded, a small number (n = 9) of the spouses were males. This study provided an additional assessment of spousal concerns and further evidence of the relative importance of potential activities for spouses. In addition, differences between spouses who expected to work and those who did not were considered, and the male spouses were examined separately.

DISCUSSION

There are a variety of factors which need to be considered in developing an expatriate process that incorporates the needs of the spouse. In particular, spouses' needs appear to vary depending on their gender and work expectations, and because of personal characteristics, previous experience and knowledge of a particular location.

Spouses appear to fall into three categories, each of which is affected somewhat differently by the expatriate assignment, and each of which may require a somewhat different expatriate package. The three groups are:

1. Female spouses, who do not expect to work in the foreign location,
2. Female spouses who do expect to work in the foreign location, and
3. Male spouses, who predominantly expect to work in the foreign location.

Female Spouses who do not Expect to Work in the Foreign Location - may be thought of as the "traditional" expatriate spouse, and most of the previous research has been geared towards this group. The most important concern with this group is that the wife will suffer substantial culture shock in the foreign location and will shut herself away from the world. When this occurs, it seems possible that the expatriate may decide it is better to return home prematurely rather than risk his wife's emotional, physical, and psychological health, and possibly their marriage. For this group, the important need is an ability to deal with culture shock effectively. A realistic preview of what it means to live in the foreign country is important as well as training that will allow the wife to function on a day to day basis in the new environment. Understanding the nature and inevitability of culture shock as well as how to deal with it is important. Support systems in the foreign country to help the wife through bad periods and to monitor progress help ensure that the transition to successful adaptation is more likely to take place. Once a successful transition occurs, these spouses very often become an integral part of the system - providing support for others who arrive and providing realistic previews once

they return home. Of course, returning home is not as simple as it sounds, and returning wives need to be aware that they will again face culture shock, and they will need initial support in reestablishing a life at home.

Female Spouses Expecting to Work Outside the Home - face the issue of culture shock as well, but they have the added concern of their own job situation. This group is likely to increase in size as more women around the world participate in the workforce and have careers. In the case of Canadian government personnel, for example, close to 50% expected to work outside the home. These spouses describe themselves as knowing relatively little about the possibilities for work in the host country and as being relatively unprepared for the foreign work/employment environment. They consider a lack of productive activities more of a contributor to stress than those who did not expect to work. The important issue for this group is help in finding jobs or other productive career-related opportunities. These spouses need to understand the job situation that they will face in the foreign location before getting there. They need assistance in obtaining work permits and other necessary documentation, and, once on site, they need company support to identify appropriate opportunities. For these spouses, adequate time to prepare for the move is important. This gives time to make arrangements with their current employer (for example, a leave of absence may be possible) as well as to make initial inquiries about job possibilities in the foreign location (e.g., other companies with subsidiaries in the foreign country can be contacted). Once in the foreign location, these wives need the company's assistance in making contacts. This can be in the form of introductions to appropriate people in other organizations, as well as provision of office space and administrative assistance in the job search. If locating a job is likely to be difficult, or work permits are unlikely, then alternatives can be explored. For example, research or educational opportunities may be available. Solomon (1994b) cites the successful example of a woman manager of a museum who went with her husband from Canada to Hong Kong; there she worked closely with schools and museums to become an expert in Asian art. Women in this group who do not find work or other productive activities outside of the home often mention the importance of the work that they do for their husband's company, in the form of entertaining, providing support for other new arrivals, and so on. These women feel that this contribution goes largely unnoticed, thus companies may benefit from doing more to identify and celebrate these contributions. When these women return home they will need support in reestablishing a career at home. Again, the company can provide networking support as well as an office environment from which to conduct a job search.

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Male Spouses - appear to be a relatively small group at present (about 10% of U.S. spouses according to Solomon, 1994b) but all indications are that this group will grow as more women reach middle management levels and seek international assignments. It seems likely that the number of male spouses in foreign locations will increase as more women have careers and accept foreign postings. The Royal Bank of Canada's Manager of Relocation Services in Toronto recently reported that more women were relocating, and KPMG's Director of International Executive Services pointed to cases where husbands of transferred women executives found the situation so stressful that it led to break-up of the marriage (Canadian HR Reporter, 1997). Male spouses, almost universally in Studies 1 and 3, intended to work outside the home and they feel particularly strongly that the company should assist them in finding productive activities. Male spouses who are unable to find productive work are, moreover, in a situation that is somewhat unique. Most of the other spouses are women and the male spouse is considered atypical, nonworking men may be seen as somewhat unacceptable in certain locations, and they themselves have been conditioned to feel less worthy if they are not contributing financially. This suggests that male spouses may need substantial support in adjusting to the expatriate spouse life. They need the same understanding and support as their women counterparts, but they may need more emotional support, and this may be difficult to find. A CBC radio report in 1995 described the development of a telephone hotline in Europe run for male spouses by male spouses, and more support systems of this kind are likely to emerge as the number of male spouses increases. The expatriate's firm can help identify such systems, but, most importantly, it seems that male spouses want the company to pay attention to their needs. This group feels especially strongly that the company should provide financial support to the spouse - this may be in the form of creating a job for the spouse, providing an office with equipment so that the spouse can work on his own, providing money to support research and education, and so on. This group also emphasizes the need for financial support on returning home while the husband reestablishes a career. They see this reestablishment as taking time and that during that interval [TABULAR DATA FOR TABLE 1 OMITTED] the family suffers financially because at home they need two incomes. They believe that the wife's company should accept the responsibility of making up this loss in income.

Table 1 uses ratings of a variety of corporate activities for spouses, drawn from Study #3, to rank potential company initiatives in order of importance, and to compare female and male spouses. These activities may serve as a starting point for companies wishing to identify activities that can be incorporated into the expatriation process.

If current social trends continue it is likely that male spouses and spouses with careers will increase in the future. This means that workrelated issues for spouses will be increasingly important considerations. They will be important for those selecting employers as well as for those accepting foreign postings. The Globe and Mail (1993) cited Ciba Geigy as paying \$1500 for job counseling for a transferred executive's husband, CARE International as offering formal job hunting and support for spouses, and Ameritech as providing \$1000 per month for commuting for one year. These examples illustrate the kinds of initiatives being implemented by companies that have realized the importance of spousal satisfaction in an effective transfer. Companies need appropriate policies and practices for these spouses if they want to attract and retain the best candidates.

In developing specific policies and practices for expatriate spouses, a company can also consider the personal characteristics of a given spouse, as well as previous experience and knowledge of a particular country. All spouses making a move to a foreign location will need some training and support, but some will need more than others. In general, if a spouse is flexible and adaptable, has previous successful foreign experience, and is familiar with a particular country, the need for training and support will be lower. Where the reverse is true, the need for training will be substantial.

The Expatriate Assignment Life Cycle

Spousal needs also seem to vary depending on the stage of the "life cycle" of the assignment and the spouse's apparent success at adapting to the new environment. The life cycle concept is familiar in terms of products and services, but it applies in many other situations as well. In the expatriation process, spouses progress through varying degrees of involvement in the international environment. As spouses progress through the stages of expatriation, their needs change. Companies can use these life cycle characteristics to design spousal programs which are both effective and cost efficient. Windham International, Citibank, Allen Bradley, and the Royal Bank are among companies providing spousal relocation services; these services seem, however, to focus on the early stages of the relocation process (Solomon, 1994b; Canadian HR Reporter, 1997). For example, a Royal Bank executive stressed the importance of the first six months of an assignment. These first months are likely to be critical, but the following discussion illustrates issues to be considered throughout the expatriate assignment.

The expatriate life cycle can be thought of as encompassing four stages - pre-assignment, early assignment, late assignment, and post-assignment. The

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following looks at each stage and the special concerns of each stage.

The Pre-assignment Stage - the company wants to select the best candidate for the assignment. Given the importance of the spouse, this means assessing the spouse as well as the candidate. The spouse must be willing to relocate, and preferably want to relocate. Relocation will be stressful, and each party needs to be able to provide support for the other. The spouse should be flexible, adaptable and open to cultural differences (Exxon is reported to believe that language ability is the best indicator of cross-cultural adaptability). This is at least as important, or more important, for the spouse because the spouse has to interact in the foreign culture on a daily basis - buying food, finding transportation, taking children to school, and so on. To assess spouses, a company will usually interview them, and often have a returned spouse participate in the interview. Various psychological tests are available and should be evaluated to determine if they provide valid information on important psychological traits. These may be useful if the spouse is willing to undergo such testing.

Once a candidate and spouse have been identified for a specific position, it is then appropriate to provide a realistic preview of the location before proceeding to training. The intent is to ensure that the couple understand what this foreign assignment will be like, so they can make an informed decision about accepting. This preview should focus on the nature of culture shock as well as the specifics of the particular location. Returned expatriates and spouses are often helpful in providing an accurate preview. Inpatriates (as described by Harvey & Buckley, forthcoming) from target countries can also provide an "insiders" view, including a sense of how the expatriates can expect to be accepted into local society. As well, a trip to the country in question can be incorporated into this stage. According to Solomon (1994b) a pre-assignment trip is relatively common - offered by about 75% of companies - but it is not always used effectively. Such a trip allows the couple to experience the reality of the foreign location first hand, but to be helpful it must be long enough and structured to explore areas of concern (housing, schools, entertainment, job opportunities, and so on) not simply as a sight-seeing tour.

Once a couple has accepted a foreign assignment, then training should be provided. Chevron Overseas Petroleum provides expatriates with an expatriate manual as a first step in preparing them for relocation (Solomon, 1994b). This manual details company policies that apply to expatriates. For the spouse this training should focus on functioning effectively on a day-to-day basis and dealing with the negative aspects of culture shock. Language

training is usually a critical component of this training, but other aspects of the culture are important, as well as practical issues such as understanding the foreign currency, food habits, and so on. For spouses expecting to work, training should include the employment situation in the foreign location, and consideration of options other than paid employment. This training can be done in-house by the company, but there are cross-cultural training consultants available, and some companies, especially small and medium sized companies and those with only a small number of expatriates may prefer to avoid devoting internal resources to cross-cultural training issues. These companies may find it effective and more cost efficient to use these services rather than develop in-house programs. There are a wide variety of companies offering cross-cultural training. For example, a review of the articles cited in this paper identified the following Canadian and US-based firms - Calgary's Expatriate Group, Cornelius Grove & Associates, Family Guidance International, the Impact Group, International Orientation Resources, Maenner Relocation, Windham International.

The Early Assignment Stage - having completed the pre-assignment stage, the couple should be prepared for the move, and ready to enter the foreign country. They are now entering the early assignment stage, which coincides with the "honeymoon stage" described in the literature on culture shock (Black & Mendenhall, 1991). Initially, most couples will enjoy the foreign experience, but they may need additional language training, and they will need a support system made up of people who can help them make the necessary arrangements for housing, schooling, transportation and so on. Traditionally this support system is informal, provided by other expatriate spouses. Companies can ensure that it is successful by assisting in the organization of mentoring and telephone hotlines, social events, providing meeting places, and so on. This provides the company with an opportunity to assist the newcomer while acknowledging the contribution of those already there. The company can also involve spouses of local managers in support groups to ensure that the expatriate spouses have an entree into the local society.

This support system becomes especially important as spouses move from the honeymoon stage of culture shock to the crisis stage, where adjusting to the reality of the new culture is difficult. It is predictable that expatriates will experience a period where the excitement of moving wears off, and the reality of the foreign location is seen in a negative light. During this period, spouses tend to withdraw, and they particularly need other expatriates with whom they can discuss their concerns. This stage can be especially difficult for spouses expecting to work who have not been able to find work or other productive activities. Support groups need to be in contact with spouses as

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often as possible to evaluate their progress and take appropriate steps to ensure recovery and adjustment. For some spouses, this may require psychological counselling, and the company should be prepared to make such counselling available when it will be helpful.

The late Assignment Stage - the successful expatriate couple will come through the crisis stage and adjust to the foreign location. Usually the assignment will then be a success. The couple is then entering the late assignment stage, which lasts until the assignment is completed. This period is one of less involvement for the company because the adjustments have been made successfully. However, during this period, maintaining contacts with the home country becomes important. Some companies (for example, Allen-Bradley has an integrated global program, which incorporates family members, Milwaukee based mentors and an annual Human Resource review, see Solomon, 1994b) maintain home-based mentors for their expatriates to ensure they are not forgotten; similarly, spouses need to keep in touch with events at home. Returning spouses can be encouraged to keep in touch with those still in foreign locations. This can help the returnee express their own culture shock at returning home while preparing others for a similar experience.

The Post Assignment Stage - the final stage of the expatriate assignment is post assignment. Although researchers have pointed to the importance of managing this stage, companies have tended to assume that "coming home" should be easy. This is not the case. Spouses face many of the same issues coming home that they did in moving away. They have to reestablish themselves in a new environment. For those seeking work who have been out of the job market for some time, finding appropriate work at home may be difficult. Couples find themselves going through another cycle of culture shock. All of this is especially hard to deal with because this is home and it seems that it should be easy to reestablish one's life. Companies can provide support to get couples through this stage just as they did in the early assignment stage. The support groups can also work with expatriate spouses coming to the home country from foreign locations, helping them through their early assignment stage.

The discussion so far has focussed on companies undertaking a variety of selection, training, and support initiatives for the expatriate spouse. Table 2 summarizes the major needs of the spouse during each stage of the assignment.

Reluctance to Undertaking Spousal Programs

According to a manager at RHR International, companies

are "loath to talk about a candidate's family" (The Globe and Mail, 1992, B4). Given the importance of the spouse and the cost of failure, it is important to explore this reluctance. Companies may avoid taking proactive steps to deal with expatriate spouses for a number of reasons. In Canada and the U.S., and increasingly in Western Europe, it is often considered inappropriate to include the spouse in hiring or transfer decisions because laws prohibit discrimination on this basis (Davison & Punnett, 1995). Some Human Resource executives interviewed in Study #1 indicated that their companies simply transfer this noninvolvement policy to international transfer decisions even though more proactive spousal policies could benefit both the company and the expatriate and spouse. Clearly, proactive policies could be seen as discriminating against a potential employee on the basis of spousal characteristics; alternatively, if additional benefits are provided to expatriates with spouses, or special benefits for male spouses, these may also be seen as discriminatory. These issues can be anticipated, and clear policies associated with transfers and spousal programs developed. From a business person's viewpoint, it seems that if the rationale for the policy is clear to all employees, and if both expatriates and spouses are willing to participate in the selection, training and support systems, these issues can be resolved effectively.

As well, companies may see additional programs for spouses primarily as increasing costs and ignore the costs of expatriate failure. The suggestions in this paper are relatively low cost and the benefits in terms of spousal satisfaction and, in turn, expatriate satisfaction and performance should be substantial. For example, the amounts spent on spousal support can be relatively small - in 1995, Westwood Telecommunications was reported to offer \$4000 to replace lost spousal income and Alcan and Proctor and Gamble up to \$3500 to provide spousal support (Stewart, 1995). Any company would, nevertheless, want to evaluate the cost of a specific spousal program and compare this with the expected benefits, prior to implementing the program.

Some Human Resource executives interviewed in Study #1 indicated that they were unsure of the effectiveness of such programs. The evidence with regard to the effectiveness for spouses is still minimal because of the lack of research in this area. It is clear, however, from interviews with and surveys of spouses that they perceive these programs to be necessary and important (Black & Gregersen, 1991; Moore & Punnett, 1993; Punnett, Crocker, & Stevens, 1992). There is evidence that expatriate training and support pay off in terms of overseas performance (Earley, 1987). It seems that the same is quite likely true of spouses, and research does indicate that a spouse's successful adaptation is highly correlated

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with the expatriate's success.

In addition, companies may feel that a limited time frame precludes implementing rigorous selection and training programs for either expatriates or spouses. It seems clear that an expatriate failure is more expensive than a small delay in sending a family to a foreign location. Thus, this rationale seems misguided. Companies need to ensure that they are preplanning for expatriate assignments; it seems too important an issue to leave up to sudden decisions. In those situations where the expatriate is urgently needed immediately, it would be more appropriate to make an initial, short-term visit which could be undertaken without the spouse. In the interim, the spousal aspects of the posting could be investigated. The expatriate can then return for appropriate training before moving with the spouse.

The aim, from the company's viewpoint, is to develop an expatriate process which incorporates the needs of the spouse and is also cost effective. The reasons for reluctance cited previously can be looked at pragmatically by the company to determine if the concerns are genuine. An evaluation of the costs associated with a spousal program compared to the benefits of greater expatriate success (and a lower failure rate) may show that relatively inexpensive changes can yield substantial benefits.

CONCLUSION

The area of spousal issues in expatriation is under researched. This needs to be changed, particularly to deal with the changing nature of expatriates and spouses today. More and more spouses are likely to have careers of their own, and more are likely to be male than in the past. Some recent studies of spouses serve as the basis for this study, but these are only a beginning. In order to help firms deal with this challenge, academics will have to provide more research on which firms can draw to improve the expatriation process. Much of the research cited in this paper is North American based; thus conclusions are not generalizable to all expatriates and spouses. Some research has focussed on Australia/New Zealand, Japan, and Western European expatriates, but there is a substantial need for more research throughout the world to expand understanding of what factors contribute to effective expatriation, and how these vary depending on home and host country characteristics.

In spite of the relatively limited research pool of expatriate spouses, the literature attests to their importance in the success of an assignment. This in turn suggests that companies' expatriation processes should incorporate spousal issues. This paper has suggested a number of ways in which firms can do this. The suggestions

contained in this paper appear to be cost effective - that is, their cost should be minor relative to the benefits of increased expatriate success and performance.

This paper has summarized information on expatriate spouse issues, from a variety of sources, and is intended to provide information for international human resource managers, and other executives, who deal with expatriate assignments; and provide a stimulus for more needed research on spouses in these assignments. These readers will find more detailed information in the original papers and articles; for example the series of articles in *Work Force* provides examples of activities undertaken by specific companies. The topic of expatriate spouses is one where academic research and managerial program development needs seem to coincide, and where cooperative efforts can provide valuable insights and usable results for managers.

Table 2

Major Needs of Spouses

A. Pre-Assignment

Spousal Interviews, Psychological Tests Realistic Preview of Culture Shock & Foreign Location, On-Site Visit Language and Cultural Training, Job/Employment Issues

B. Early Assignment

Assistance with Daily Activities Administrative Support and Networking Assistance re Job/Employment Financial Support for Education/Research/Other Productive Activities Counselling for Culture Shock Crisis

C. Late Assignment

Recognition of Contribution Maintain Ties to Home

D. Post Assignment

Assistance Reestablishing Home & Family Life Assistance with Job/Employment Support in Dealing with Culture Shock

NOTES

1. Children may also be an important component of the expatriate process, but this study does not specifically address this issue.

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