

## A different perspective of expatriate management

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### ABSTRACT

Based on a total of 243 papers and theses published in Taiwan and the West, this study provides a different perspective on expatriation management. The investigation includes selection criteria, staffing, training, the female expatriate, the expatriate spouse, and international adjustment. Research reveals that there are similar core concerns, such as an expatriate's professional knowledge, personality, adaptability, and international adjustment. Context-specific concerns also emerge. Taiwanese companies care more about expatriates' personal skills and willpower compared to the West, where companies care more about an expatriate's past performance, adaptability, and spousal adjustment. As more and more resource conscious SMEs are moving to compete in the international arena, attending to their international management needs becomes a pressing issue. This study provides the form, as well as the essence of Taiwanese expatriation management, especially with FDIs based in Taiwan playing a crucial role in the recent economic development of Asia. Taiwan's past successful international expansion certified the value of its expatriation management, particularly under severe resource constraints. The findings of this study may have policy and practical implications for relevant parties and emerging economies.

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### 1. Introduction

As business continues to globalize, it has become increasingly common for organizations to assign their employees to extend work assignments overseas (Bolino, 2007). Lazarova and Caligiuri (2001) and Caligiuri (2000) accurately pointed out that multinational corporations (MNCs) today have recognized the critical role that human resources play in global competitiveness. Hence, MNCs often send their managers and executives to other countries in an attempt to closely observe changes in the international economic scene, to develop international management competencies, and to facilitate entry into new markets (Belderbos & Heijltjes, 2005; Kim & Slocum, 2008; Shaffer, Harrison, & Gilley, 1999; Tung, 1998; Van Emmerik & Euwema, 2009). However, 16–40% of the assignments end in failure (Black, 1988; Lazarova & Caligiuri, 2001; Windham International, National Foreign Trade Council, & Management, 1999), and the estimated cost of failure has risen from as much as US\$250,000 a decade ago to US\$ 1 million per failure for U.S. firms today (Kraimer, Shaffer, & Bolino, 2009). In addition to the substantial costs, each failure affects the company immensely with respect to reputation, resources, and employee depression (Black & Mendenhall, 1989). Consequently, effective expatriate assignment management poses a crucial challenge for international human resource managers (Black, 1990; Black & Mendenhall, 1990; Black & Stephens, 1989).

Historically, past literature has primarily highlighted and investigated expatriation issues of MNCs in Western countries; yet in the words of Adler, Doktor, and Redding (1986, p.296), "Paralleling the shift of business from the Atlantic to the Pacific Basin, we move from the field's conceptually Occidental history to an Oriental perspective." In Asia, foreign-directed investment (FDI) based in Taiwan is becoming a major source of economic strength. The aggressive outbound investments of Taiwanese enterprises in Southeast Asia have had a substantial impact on the economic development of the Pacific region (Lee, 1994; Liang, 2004).

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According to the [Taiwan Ministry of Economic Affairs \(2007\)](#), Taiwan has been the second largest investor in Vietnam from 1995 until the present, and led investment in Malaysia from 1990 to 1996. Aggressive Taiwanese investment in China since the opening of trade between these two societies in 2000 has also been witnessed. The most recent statistics, released by the [Taiwan Ministry of Economic Affairs in April 2010](#), show that Taiwanese companies invested US\$35.8 billion in China from January to April 2010. The investigation of Taiwanese business practices is taking on added significance, not only because of the increasing stature of Taiwanese investment in Asian nations such as China, Vietnam and Malaysia, but also because of the roles played by these nations in the world economy ([Lin & Wei, 2005](#)).

One feature of this research is the focus on expatriation management in Taiwan, considering its increasing FDI in China and Southeast Asian countries. In addition, with the prevalence of Confucian culture in Asia, the findings may serve as a supplement to expatriation management practices in the West. This study also takes a more comprehensive view than do previous international comparative studies which are limited to the following one or two specific issues, such as the expatriate's personality, international adjustment, selection and staffing, compensation, and performance appraisal ([Bhaskar-Shrinivas, Harrison, Shaffer, & Luk, 2005](#); [Bolino & Feldman, 2000](#); [Caligiuri, Phillips, Lazarova, Tarique, & Burgi, 2001](#); [Gregersen, Hite, & Black, 1996](#); [Mendenhall & Oddou, 1985](#); [Peltokorpi, 2008](#); [Ronen, 1990](#); [Shen, 2006](#); [Suutari & Brewster, 2000](#)). Furthermore, the findings of this extensive literature provide future researchers with a basic, yet comprehensive understanding of this field of study. With Taiwanese companies' successful international expansion in spite of constrained resources during the past few decades, our research may shed some light for companies in emerging economies or with resource constraints. Specifically, this study attempts to uncover the concerns over expatriation management through the academic research lens in both Taiwan and the West.

This paper first introduces the purpose of conducting the expatriation management research of Taiwan as a supplement to what has been promoted in the West. Then, it describes the data sources. Afterwards, it presents the research results and derives relative propositions. It delineates the stage development of expatriation management research, and finally, it concludes with implications for further research.

## 2. The purpose of conducting this study

Globalization and the concomitant need to compete in a rapidly changing environment have challenged organizations worldwide and resulted in the large increase of direct investment in developing countries ([International Monetary Fund, 2009](#)). Such a trend has prompted a plethora of research in international management, among which, expatriation management is a particularly crucial area ([Mezias & Scandura, 2005](#); [Shaffer et al., 1999](#)).

Expatriates, as representatives of the home company, carry the heavy responsibility of excelling in cross-border organizational performance, establishing public relations, and instilling the headquarters' values in local nationals. Extant Western theories assert that a firm engaged in FDI must have strong resources and capabilities ([Cheng & Lin, 2009](#); [Dilova & Witteloostuijn, 2007](#); [Frynas, Mellahi, & Pigman, 2006](#)), which explains the plethora of MNC expatriation management research. Yet, not all firms have such luxuries, especially the recent aggressive small and medium sized enterprises (SMEs) international movers. To date, the expatriation management of SMEs has seldom been addressed. Generally speaking, SMEs tend to engage in start-up FDI in emerging markets to realize ownership advantages over less competitive local firms. As a result, they rely heavily on their expatriates to monitor the relatively uncertain host country environment ([Cheng and Lin, 2009](#)). The current study attempts to enrich this field by looking into the issue from the perspective of Taiwan's SMEs. In addition, Western MNC expatriation management will also be presented for comparison purposes.

From the viewpoint of resource-based theory, the resources SMEs can manipulate when expanding operations across national borders are quite different from those of MNCs. For instance, Taiwanese firms relocate labor-intensive production to other low-cost countries to exploit cheap labor, whereas many Western MNCs target local market share. In addition, Taiwanese SMEs send expatriates to closely monitor economic, social, and political developments in the host country in order to swiftly respond to any turmoil in those relatively uncertain emerging markets ([Cheng & Lin, 2009](#); [Jaw & Liu, 2004](#)). From an agency theory perspective, Western expatriate management may apply a principal-agent relationship. Yet, Taiwanese culture is rooted in Confucianism that emphasizes *guanxi* (i.e., interpersonal connections with the owner), harmony (i.e., a conflict-free system of social relations), and the ordering of relations among social roles ([Adler and Kwon, 2002](#); [Huang, Chi, & Lawler, 2005](#)). The observation that Taiwanese culture puts more emphasis on social networks, interaction, and membership in social clubs encourages us to speculate that expatriation management in Taiwan is different from that in the West.

## 3. Data sources

Expatriation management research started in the West to improve expatriate performance, as well as subsidiary performance across national borders. Therefore, a thorough understanding of the evolution of this field of study in the West is imperative when tapping into its development in Taiwan. As a result, we first search Western practices in international journals, and then local Taiwanese literature, to get a fuller view of this topic of interest. The reason for choosing papers in the following professional journals is that their contents are considered "certified knowledge," having gone through several rounds of expert review by fellow researchers ([Ramos-Rodríguez & Ruíz-Navarro, 2004](#)).

Social scientific research generally reflects the ongoing concerns of a society. To obtain a representative collection of journal papers on expatriation management over the past four decades (from 1971 through 2009), the following journals were searched and reviewed: *Journal of International Human Resource Management*, *Human Resource Management*, *Journal of International*

Business Studies, Academy of Management Journal, Journal of Applied Psychology, Management International Review, Journal of Management, and nine scholarly management journals published in Taiwan. Due to the late development of FDI based in Taiwan, the initial local journal paper search generated little relevant literature. To get a better picture about the social concerns of expatriation management in Taiwan, we have decided to include Taiwan National Science Council Research Reports and student theses. The rationale for searching the Council's database is that a majority of active researchers in Taiwan obtained research grants from it, and students' theses reflect future job-seekers' concerns.

Because our main goal is to explore topics of interest in expatriation management, rather than the quality of expatriation research, we are confident that inclusion of Taiwan National Science Council research reports and students' research contributes to a fuller understanding of expatriation management of FDI based in Taiwan. In other words, the social concerns over expatriation in Chinese ethnic countries (where Taiwan FDIs have mainly invested) can be better uncovered with various sources of research reports that cannot be easily obtained outside of Taiwan. For easier description, the literature we have searched for analysis is referred to by "paper" hereafter.

The papers we reviewed have the following traits: (1) they are devoted to issues of international human resource management or expatriation management; (2) they contain valuable certified knowledge; (3) they reflect scientific interest over time; and (4) they have been included in databases for full-paper retrieval (Ramos-Rodríguez & Ruíz-Navarro, 2004). For the "certified knowledge" of research reports and theses, obtaining a Taiwan National Science Council research grant requires the approval of two independent reviewers in the first round, and a review committee in the second round. The process was similar to a paper review. The students' theses required the supervision of a chair professor for at least a year and 3–5 committee members' consent in an oral defense, which should be regarded as certified knowledge as well. However, for clearer presentation, we report students' research in a separate column. Although we do not include all relevant research in all journals, we are reasonably confident that the papers analyzed in this study are a representative sample of international human resource management in the West and Taiwan.

In searching for the papers, we used multiple keywords (e.g., expatriate, expatriation, international assignment) to identify relevant articles and research. Through this process, we have identified 243 papers containing information pertinent to the topics of interest. Of these, 140 are Western papers and 103 are Taiwanese papers, including students' theses. Judging from the relatively small sales volume reported in most Taiwanese papers, about 70% of FDIs based in Taiwan (Ministry of Economic Affairs statistics) are SMEs with employee numbers under 200; large companies were not allowed to invest in China before the year 2000, and SMEs constitute about 97.63% of the economic entities in Taiwan (SME White Paper Book, 2009). We are confident in saying that the expatriation management issues reported in this research mainly reflect the concerns of SMEs in Taiwan. As for the international journal papers, a majority of the research is conducted in North America and Europe; therefore, it is fair to say that they are Western papers.

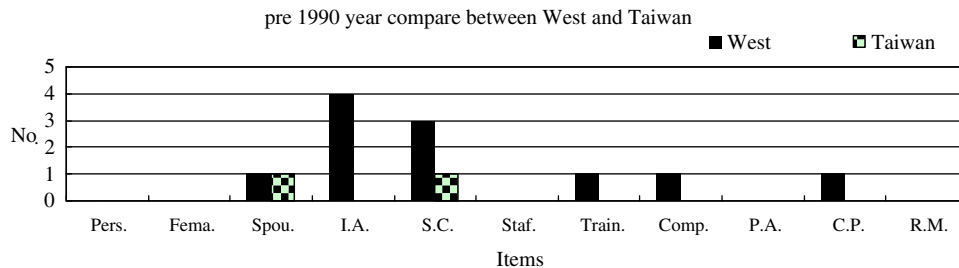
For easier explanation, we divided the papers into stages, with ten years as a stage. Only fifteen relevant papers were published before 1990. The second stage includes 70 papers from 1990 to 1999, and the third stage numbers 158 papers from the year 2000 onward. This distribution reveals that expatriation is a relatively current topic. Readers are referred to Figs. 1–3 and Table 7 for details.

#### 4. Comparison of Western and Taiwanese expatriation management

In the following, we review the key issues of expatriation management, including selection criteria, staffing, training, the female expatriates, expatriate spouses, and international adjustment in the West and Taiwan. Respective propositions are also presented.

##### 4.1. Selection criteria

Many organizations have been increasing their efforts to identify and select the most qualified employees for expatriate assignments (Shen, 2006; Tung, 1981). Because selection is the initial step of expatriation management, selection criteria have



Note:  
 Pers.= Personality, Fema.= Expatriate Female; Spou. =Expatriate Spouses; I.A.= International adjustment;  
 S.C.=Selection criteria; Staf.= Staffing; Train.=Training; Comp.=Compensation; P.A.= Performance Appraisal;  
 C.P.= Career planning; R.M.= Repatriate management

Fig. 1. Comparison of papers published in the West and Taiwan before 1990.

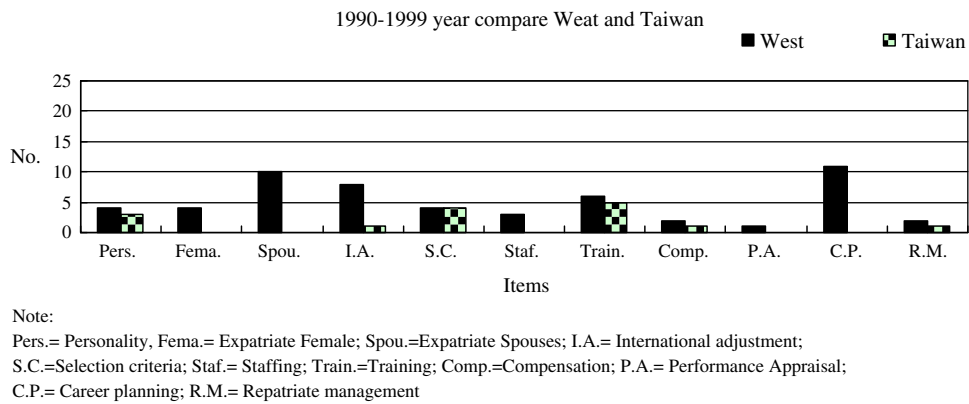


Fig. 2. Comparison of papers published in the West and Taiwan in 1990–1999.

been well documented as described hereunder. Table 1 presents the number of relevant papers published in the West and Taiwan.

The Western and Taiwanese extant literatures have identified many factors as valid predictors of expatriate success. These include skills (e.g., technical skills, managerial skills, leadership skills, past performance, and previous overseas work experience), ability (e.g., good ability to communicate, adaptability, and ability to command respect), personality (e.g., cultural empathy, initiative, creativity, independence, emotional stability, maturity, and interest in overseas work), and demographics (e.g., education, age, marriage, medical status, and adaptability of family) (Chiou, Chuang, & Wen, 2007; Lazarova & Tarique, 2005; Mendenhall, Dunbar, & Oddou, 1987; Mendenhall & Oddou, 1985; Riusala & Suutari, 2004; Ronen, 1990; Tsai, 1998; Tung, 1981; Tungli & Peiperl, 2009; Wu, 1995a; Wu & Tarn, 1999; Wu, Tsai, & Lin, 1999).

Table 1 shows that in general, Western studies focus more on expatriates' past performance, ability, and adaptability. In Taiwan, the most commonly cited selection criteria are professional knowledge and skills, willingness, willpower, and patience (Tsai, 1998; Wu, 1995b; Wu & Tarn, 1999; Wu et al., 1999). Taiwanese companies need the expatriates to be functional on the first day of their international duty; therefore, personal skills of varying types are very important as there is no time for learning by doing. Li (2003) particularly points out that willingness is the second most important selection standard, after work experience. Moreover, with limited resources, Taiwanese expatriates face role overload and weaker organizational supports (Lii & Wong, 2008). This explains why willpower and patience in the form of diligence and long working hours are of greater importance to Taiwanese companies. The likely explanation of this finding is that Western companies are goal oriented with a mature expatriation system which has set up an international assignment standard. Yet, a majority of Taiwanese companies generally invest in developing countries with poorer living and economic conditions, a situation which tends to reduce the willingness of expatriates, especially if they have children of school age (Wu, 1995a, 2000; Wu & Tarn, 1999; Wu et al., 1999; Yu, Yi, Chiao, & Wei, 2005). Based on the above discussion, we propose that:

**Proposition 1.** For an international assignment to be successful in resource-constrained companies, expatriates' personal skills and willpower are more important than past performance or adaptability.

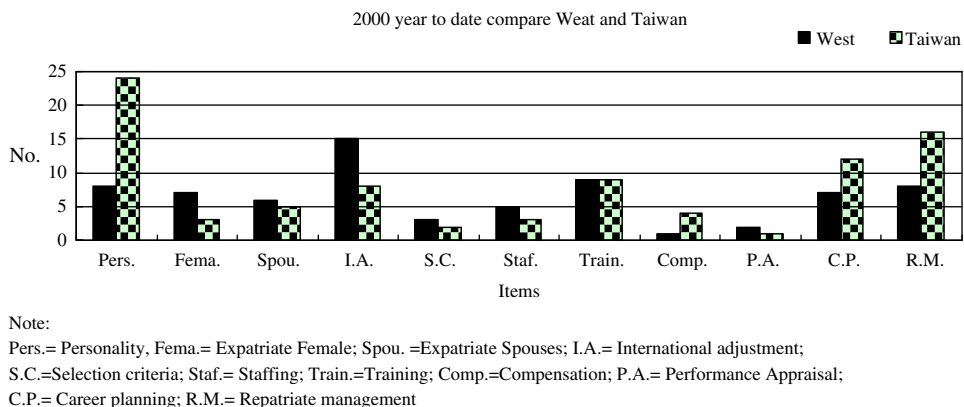


Fig. 3. Comparison of papers published in the West and Taiwan after 2000.

**Table 1**  
Comparison of expatriate selection criteria in Western and Taiwan studies.

Selection criteria		West	TW Total	TW Scholars	TW Students
Skills	Technical skills	1	4	0	4
	Managerial skills	1	4	0	4
	Leadership skills	1	0	0	0
	Communication skills	2	2	1	1
Performance	Past performance	2	0	0	0
Willingness	Expatriate willingness	1	3	1	2
Experience	Previous overseas work experience	1	1	1	0
Ability	Potentiality	2	0	0	0
	Creativity	2	0	0	0
Adaptability	Adaptability of expatriate	3	1	0	1
	Adaptability of family	4	0	0	0
Personality	Cultural empathy	1	1	1	0
	Initiative	2	0	0	0
	Independence	2	0	0	0
	Emotional stability	2	1	0	1
	Maturity	2	1	0	1
	Interest in overseas work	1	0	0	0
	Willpower	0	2	0	2
	Patience	0	2	0	2
Dependent variables of selection criteria					
General adjustment		1	1	1	0
Interaction adjustment		1	0	0	0
Work adjustment		1	0	0	0
Psychological adjustment		1	0	0	0
Socio-cultural adjustment		1	0	0	0
Cross-cultural adjustment		1	0	0	0
Expatriate performance		1	1	1	0
Withdrawal		1	0	0	0

Note: The number is the frequency of the variables, constructs, or dimensions used in the sample literature.

#### 4.2. Staffing

International staffing is a major strategic human resource deployment that may determine the success or failure of the geographically dispersed, far-flung global operations of MNCs (Hendry, 1994; Shen & Edwards, 2004). Options include assigning parent-country nationals (PCNs), host-country nationals (HCNs), third-country nationals (TCNs), and a mixed and ad hoc (Shen & Edwards, 2004) arrangement.

Western studies generally investigate the effect of deploying expatriates or local nationals from three perspectives, namely firm-specific factors, host country context, and other factors. First, firm-specific factors include international strategy, cultural distance, stage or mode of internationalization, type of industry, size of international operations, reliance on international markets, and top management's perception of home human resource management systems. Second, host-contextual factors contain political, legal, economic, and socio-cultural factors; third, other factors consist of trust and personal morale (Gong, 2003a, 2003b; Harvey, Speier, & Novecevic, 2001; Tan & Mahoney, 2006; Tarique, Schuler, & Gong, 2006; Tharenou & Harvey, 2006). These studies mainly employ a control and coordination framework to explain the choice between PCNs and HCNs.

From six relevant studies conducted in Taiwan (Cho, 2004; Chung, 2000; Huang, 2002; Hung, 1997; Tsou, 2002; Tsou, Yu, & Seetoo, 2007), variables of concern largely agree with those reported in Western literature that emphasis on key international positions such as chief executive officer and treasurer, which require high trust, must be staffed with expatriates (Huang, 2002; Tsou, 2002; Tsou et al., 2007). In addition, investing in emerging markets in which legal systems are tenuous, and political risks, intellectual property rights, and public as well as private expropriation are hazardous (Delios & Bjorkman, 2000; Delios & Henisz, 2000), Taiwanese companies tend to use expatriates in key positions.

Another stream of research has examined factors influencing MNCs subsidiary staffing decision making. There are three different "mindsets": an ethnocentric orientation (key positions are mostly staffed with home country nationals), a polycentric orientation (staffing decisions are made locally with most positions staffed with host country nationals), and a geocentric orientation (efforts are made to find the best persons for each position regardless of their nationality). It is interesting to note that in the United States, as early as 1994, MNCs used 49% of HCN top managers, 88% of HCN managers, and 98% of HCN non-managers in overseas operations (Kopp, 1994). A possible explanation is that most U.S. MNCs have in place a good international human resource management system that attracts high-caliber local nationals (Kopp, 1994) and provides them with generous compensation. Western MNCs recruit managers typically with a high level of professional knowledge to fill a particular competence gap (Mäkelä, Björkman, & Ehrnrooth, 2009).

In contrast, Taiwanese SMEs are limited in resources and are not able to compete with the Western MNCs for local high caliber with attractive compensation. In addition, according to the [Taiwan Ministry of Economic Affairs \(2007\)](#), a majority of Taiwanese SMEs invested in environmentally and politically uncertain emerging markets; therefore, they have to rely heavily on their expatriates to monitor host country environments ([Cheng & Lin, 2009](#)). As can be seen in [Table 2](#), expatriation management in the West cares more about international staffing strategy, cultural distance, and actual staffing decisions, whereas Taiwan places more concern on the political and legal factors of the host country. Based on the literature review, we propose that:

**Proposition 2.** *The nature of international staffing differs in different contexts. Smaller or resource-constrained companies and companies investing in unstable emerging economies tend to adopt the PCNs international staffing strategy, whereas resource abundant Western MNCs emphasize the HCNs strategy.*

#### 4.3. Training

Cross-cultural training has been widely discussed in Western studies ([Bennett, Aston, & Colquhoun, 2000](#); [Black & Mendenhall, 1990](#); [Bolino & Feldman, 2000](#); [Caligiuri et al., 2001](#); [Eschbach, Parker, & Stoeberl, 2001](#); [Harvey & Novicevic, 2004](#); [Mendenhall & Stahl, 2000](#); [Yamazaki & Kayes, 2007](#)). Past studies can be classified into four streams. The first is professional knowledge training, including understanding the mission, technology, and innovation. The second is skill training, such as supervisory skills, administrative skills, cross-cultural skills, decision-making skills, communication skills, and negotiation skills. The third is language and etiquette training, and the last is host-country cultural sensitivity training, including political issues and family adaptation ([Bolino & Feldman, 2000](#); [Caligiuri et al., 2001](#); [Eschbach et al., 2001](#); [Wu & Tarn, 1999](#); [Wu et al., 1999](#)).

Scholars reported that U.S. MNCs sometimes take one to two years of expatriate cross-cultural training to reduce culture shock ([Eschbach et al., 2001](#); [Yamazaki & Kayes, 2007](#)). Oftentimes, such training also involves spouses and family members ([Tung, 1981](#)). In Taiwan, companies pay more attention to host country safety and life adjustment training, since culture is not a concern as a majority of them invest in China or countries in the Southeast Asian region where ethnic Chinese with similar language and cultural background live in large numbers ([Chu, 2003](#); [Lee, 2004](#); [Wu, Chen, & Gan, 2000](#)).

On-the-job training or job rotation before taking on an international assignment is a common practice used to train an expatriate candidate ([Wu, 2000](#)). For Taiwanese SMEs, pre-expatriation training is limited to technological training given resource constraints ([Huang, 2002](#)). [Lin and Wei \(2005\)](#) also point out that Taiwanese SMEs resort to effective expatriate selection to make up the deficiency in limited pre-departure training due to concern over resources. They found that the right expatriates with the right attitude, willpower, and determination generally survive and even thrive without extensive expatriate training. Usually, expatriates from Taiwanese SMEs depend on sharing from colleagues, local employees, and friends in the host country to gain required knowledge and information.

Although the training scale is different, professional knowledge concern in Western and Taiwanese companies is similar. Yet, in the West, training relates more to individual performance such as expatriate skill, work attitude, and work satisfaction ([Bolino & Feldman, 2000](#); [Caligiuri et al., 2001](#); [Eschbach et al., 2001](#); [Harvey & Novicevic, 2004](#); [Lee & Li, 2008](#)); Taiwanese companies, on the other hand, highlight the importance of expatriates' work performance, organizational involvement, organizational citizenship behaviors, and adjustment behaviors ([Chu, 2003](#); [Lee, 2003, 2004](#); [Liu, 1999](#); [Wu et al., 2000](#)). A plausible reason is that

**Table 2**  
Comparison of Western and Taiwanese international staffing.

Staffing		West	TW Total	TW Scholars	TW Students
Staffing philosophy		Staff the best people in key positions throughout the organization, regardless of nationality.	Staff home country nationals (expatriates) in key and high-trust positions.		
Determinants of staffing					
Firm-specific factors	International strategy	5	0	0	0
	Cultural distance	8	2	1	1
	Stage or mode of internationalization	2	1	1	0
	Type of industry	2	0	0	0
	Size of international operations	3	1	1	0
	Reliance on international markets	2	0	0	0
Host-contextual factors	Political factors	4	3	2	1
	Legal factors	2	3	2	1
	Economic factors	1	0	0	0
	Socio-cultural factors	2	2	1	1
Other factors	Trust	1	2	1	1
Dependent variables of staffing					
Consequents	Staffing decisions	10	3	2	1
	Assignment success/failure	2	0	0	0
	Transaction costs	1	0	0	0

Note: The number is the frequency of the variables, constructs, or dimensions used in the sample literature.

Taiwan is a collective-oriented society which places greater value on organizational commitment and organizational citizenship behaviors, whereas Western societies are more individualistic-oriented (Hofstede, 1980; Jaw, 2006). Table 3 indicates that expatriate training in the West is focused more on individual level cross-cultural skill training, yet Taiwan emphasizes organizational level administrative skill training. Based on the literature review, we propose that:

**Proposition 3.** *Effective expatriate selection and deployment may substitute extensive expatriate training in resource-constrained companies.*

**Proposition 4.** *The nature of expatriate training differs in different cultural contexts. Individualistic countries place more emphasis on expatriate training at the individual level, whereas collectivistic countries place more emphasis on organizational level training.*

#### 4.4. Female expatriates

The recent increase in the number of studies devoted to female expatriates indicates that it is an important and timely topic (Caligiuri & Lazarova, 2002; Culpan & Wright, 2002; Fischlmayr, 2002; Kollinger, 2005; Mayrhofer & Scullion, 2002; Taylor, Napier, & Mayrhofer, 2002; Tung, 2008). Past research addressed concerns about women's motivation to embark on an international assignment, social support (Altman & Shortland, 2008), barriers to undertaking international assignments in terms of work–family conflicts (Linehan & Walsh, 2000), self-perceived barriers in international careers (Fischlmayr, 2002), the competitive advantage of female expatriates (Guthrie, Ash, & Stevens, 2003; Tung, 2004), cross-cultural adjustment, and job satisfaction of female expatriates (Caligiuri & Lazarova, 2002; Culpan & Wright, 2002).

In the male-dominant Taiwanese society, only three female expatriate papers were found (Hsu, 2004; Tai, 2007; Tung, 2000), covering issues of age, education, marriage (Tung, 2000), organizational support, and career planning (Hsu, 2004; Tai, 2007). Since a major function of Taiwanese overseas operations is manufacturing, it makes sense that most of the expatriates are male. In addition, the inferior social status and the stereotype of the subordinate role of the female in Asia make it less likely to have female expatriates (Tung, 2000). Furthermore, within a traditional Chinese culture, it is understandable that married women tend to identify family as the core of their lives and exhibit less interest in taking on international assignments (Kao, 2004; Kuo, 2001). As a result, a majority of the female expatriates in Taiwan are young, highly educated, and single (Lin & Wei, 2005; Tung, 2000).

The situation is different in Western societies, where women are generally treated as equals to men (Altman & Shortland, 2008). Tungli and Peiperl (2009) investigated samples from Germany, the U.K., Japan, and the U.S., and reported an average female expatriate rate of about 7%, ranging from 11% in U.S. companies to 0.4% in Japanese companies. Comparatively, the Taiwanese female expatriate rate was around 5% (Lee, 2000). The frequency of the related variables, constructs, or dimensions

**Table 3**  
Comparison of Western and Taiwanese expatriate training.

Contents of training		West	TW Total	TW Scholars	TW Students
Professional knowledge	Technological ability	5	7	4	3
	Innovation ability	1	0	0	0
	Learning and directing ability	3	0	0	0
	Mission understanding	1	1	0	1
	Adjustment ability	2	3	2	1
	Organizational ability	0	1	0	1
Skills	Supervisory skills	2	1	0	1
	Administrative skills	2	4	2	2
	Cross-cultural skills	9	2	1	1
	Decision-making skills	1	0	0	0
	Communication skills	4	0	0	0
	Negotiation skills	4	0	0	0
	Security skills	2	2	0	2
	International etiquette	0	3	1	2
	Relationship skills	4	2	0	2
	Language capability	8	6	2	4
Introduction to the host country	Understanding the host country culture	5	4	2	2
	Sensitivity to political issues	5	2	0	2
	Sensitivity training	3	1	0	1
	How to help the family adjust to life in the host country	2	4	2	2
Dependent variables of training Consequents	International adjustment	3	4	2	2
	Job attitudes	1	0	0	0
	Expatriate training effectiveness	1	2	1	1
	Performance	5	3	2	1
	Organizational commitment	1	3	1	2

Note: The number is the frequency of the variables, constructs, or dimensions used in the sample literature.

extracted from the literature review is listed in Table 4, which indicates that Western companies care more about female expatriate cross-cultural adjustment, international assignment barriers, and motivation. Based on the literature review, we propose that:

**Proposition 5.** *In the Chinese culture, the female is less likely to take on an international assignment.*

#### 4.5. Expatriate spouses

Relevant research has repeatedly shown that spouses play a crucial role in the successful assignee's adjustment to and completion of a global assignment (Konopaske, Robie, & Ivancevich, 2005; Kupka & Cathro, 2007; Mohr & Klein, 2004). Studies exploring spouses' willingness to relocate can be grouped into three types, namely, individual factors (e.g., spouse job involvement, spouse adventurousness, spouse adjustment, and spouse stressors), family factors (e.g., elderly relatives, age of children, and number of children at home), and organizational factors (e.g., importance of career support from the home company) (Brett & Stroh, 1995; Brown, 2008; Hays, 1971; Ivancevich, 1969; Konopaske et al., 2005; Kupka & Cathro, 2007; Miller, 1972; Mohr & Klein, 2004; Shaffer & Harrison, 2001).

Relatively few studies in Taiwan investigate expatriate spousal issues (Kao, 2004; Ko, 2008; Lin, 2006; Yi, 1998), as only about 21–44% of Taiwanese expatriates relocate with spouses, in contrast to 70% of those in U.S.-based MNCs (Jaw, 2006; Lin, 2006; Wu, 1995a). Taiwanese spouses who decide to relocate together generally have high cultural flexibility, high social orientation, high willingness to communicate, and low ethnocentricity. They also tend to interact more frequently with local nationals and adapt to foreign life more readily (Yu et al., 2005).

In Taiwan, there are four main reasons for spouses to remain in the home countries. First, in a Confucian culture that emphasizes attachment to family, a strong sense of obligation to provide children with a good education, and taking good care of aging parents (the responsibility of the first son), it is a norm that many married Taiwanese expatriates go abroad alone, foregoing the companionship of their spouses (Huang et al., 2005; Kao, 2004; Kuo, 2005; Lin, 2007; Sha, 2005). Second, the uncertain duration of expatriate assignments also affects the expatriation pattern. In the West, duration, job description, and repatriation are generally clearly laid out to the expatriate. On the contrary, in Taiwan, the lack of a well-developed expatriate system and adherence to the norm of "don't return until you succeed" make the expatriation duration unpredictable. This intimidates the spouse from going along (Lin, 2006). Third, Taiwanese companies invest heavily in China and South-East Asia, where the geographical locations are within half-day flights and allow frequent visits home. Fourth, in the last two decades, the majority of Taiwanese companies have invested in less well developed countries, where a quality education is generally lacking. As a result, the education of school age children poses a great problem for expatriates. All of the above considerations lower the willingness of the spouse to relocate.

Table 5 summarizes the frequency of related variables, constructs, or dimensions which indicate that Taiwanese studies address concerns about family separation issues, while Western studies show interest in organizational career support for spouses. Based on the literature review, we propose that:

**Proposition 6.** *In the Chinese culture that emphasizes family attachment, the spouses with more family obligations are less likely to relocate together with the expatriate.*

**Proposition 7.** *Geographic distance influences the decision of spouses to relocate. Convenient and frequent visits home increase spousal intention to remain in the home country.*

**Table 4**

Comparison between Western and Taiwanese female expatriation.

Expatriate female	West	TW Total	TW Scholars	TW Students
Expatriate percentage (examples)	US female expatriate rate is 11%.	Taiwanese female expatriate rate is 5%		
Determinants of female expatriate				
International assignment barriers	3	0	0	0
International assignment motivation	3	0	0	0
Cross-cultural adjustment	3	1	0	1
Social support	2	2	1	1
Dependent variables of female expatriate				
Consequents				
Cross-cultural adjustment	4	1	0	1
Job satisfactory	1	0	0	0
Performance	1	0	0	0
International job search	1	0	0	0
Willingness to relocate	1	1	1	0
Work-family conflict	1	1	1	0

Note: The number is the frequency of the variables, constructs, or dimensions used in the sample literature.



**Table 5**

Comparison between Western and Taiwanese relocation of expatriate spouse.

Expatriate spouses		West	TW Total	TW Scholars	TW Students	
Determinants of expatriate spouses						
Spouses going abroad (percentage)		70%		21–44%		
Spouse stressors		2	1	0	1	
Spousal adjustment		7	7	0	7	
Separated family		0	4	0	4	
Spouses' willingness to relocate	Individual factors	Spouses' job involvement	2	2	0	2
		Spouses' adventurousness	3	2	1	1
	Family factors	Elderly relative(s)	1	0	0	0
		Children age/education	7	2	1	1
	Organizational factors	Career support	6	2	1	1
Dependent variables of expatriate spouses						
Consequents	Spouses' willingness to relocate internationally		4	3	1	2
	Spousal adjustment		7	6	1	5
	Expatriate performance		5	3	0	3
	Withdrawal cognition		4	3	0	3
	Work/family conflict		2	2	1	1

Note: The number is the frequency of the variables, constructs, or dimensions used in the sample literature.

#### 4.6. Expatriate's international adjustment

Relative to other expatriation management issues, Western scholars place more effort on investigating expatriate international adjustment. They are interested in identifying what influences both work and life adjustment (Aycan, 1997; Bhaskar-Shrinivas et al., 2005; Feldman & Bolino, 1999; Peltokorpi, 2008), and the outcome of successful adjustments including job satisfaction, task performance, and relationship performance (Bhaskar-Shrinivas et al., 2005; Harrison & Shaffer, 2005; Lee & Larwood, 1983). An expatriates adjustment model proposed by Black, Mendenhall, and Oddou (1991) was used to investigate and galvanize a large body of evidence, and was regarded as one of the most influential and often cited theoretical bases of expatriation management (Hechanova, Beehr, & Christiansen, 2003; Mendenhall, Kuhlmann, Stahl, & Osland, 2002). The model was subsequently expanded and tested by Shaffer et al. (1999) to include role clarity, role discretions, supervisor and co-worker support, novelty of the culture, achievement, and social self-efficacy. Furthermore, the meta-analyses conducted by Bhaskar-Shrinivas et al. (2005) strongly support the model of Black et al. (1991), and confirm that expatriate adjustment indeed affects job satisfaction, withdrawal cognitions, and performance. Interestingly, some of the most unquestioned inputs, such as previous overseas experience and host-country language ability, are not widely covered.

Defined as the degree of comfort or the absence of stress associated with being an expatriate, international adjustment comprises three main dimensions: *general or cultural adjustment* (i.e., comfort associated with various non-work factors such as general living conditions, local food, transportation, entertainment, facilities, and health care services in the host country); *interaction adjustment* (i.e., comfort associated with interacting with host-country nationals both inside and outside of work); and *work adjustment* (i.e., comfort associated with the assignment's job or tasks) (Black et al., 1991; Harrison & Shaffer, 2005).

In Taiwan, the international adjustment issue has not been as extensively researched as in the West. Likely explanations include the following. First, Taiwanese companies mainly invest in countries in which Chinese ethnics are found in abundant numbers. Consequently, adjustment may not be a critical issue. Second, the history of internationalization and expatriate management is comparatively short in Taiwan, and third, the SME FDIs headquartered in Taiwan have limited resources and believe that selecting and deploying the right person would reduce the adjustment problem (Lin & Wei, 2005). From another perspective, Lii and Wong (2008) found that many SME Taiwanese expatriates working in China were overloaded with different work roles, including production, personnel, finance, and marketing. As a result, entrusted expatriates experience job overload more often than they do the problem of job discretion, especially when comparing the adjustment issue with Western counterparts.

Western literature presents more extensive discussions on expatriate social support than does Taiwanese literature. It is worthy to note that the clustering of the Taiwanese expatriate community in most host countries creates a friendly environment for work support, social support, and the free flow of various types of information. This scheme facilitates expatriate adjustment in foreign countries, and the often mentioned spousal adjustment is not as pressing an issue when a Taiwanese community exists. In addition, the low rate of spousal relocation, less than 50%, eliminates a significant number of potential problems. The frequency of the related variables, constructs, or dimensions found in the literature is listed in Table 6. Based on the literature review, we propose that:

**Proposition 8.** *Cultural closeness and expatriate community in the host country reduce international adjustment problems.*

#### 4.7. Additional analysis – *guanxi*

Several Taiwanese studies have explored a major feature of Chinese culture – the social relationship of expatriates, an issue which is rarely discussed in the West (Huang, 2000). Fei (1948) contrasts the “differential mode of association” in traditional

**Table 6**  
Comparison of Western and Taiwanese expatriate adjustment.

Expatriate international adjustment		West	TW Total	TW Scholars	TW Student
Type of adjustment	General adjustment	9	2	2	0
	Interaction adjustment	10	2	2	0
	Work adjustment	14	2	2	0
	Cultural adjustment	2	0	0	0
	Socio-cultural adjustment	3	1	1	0
	Psychological adjustment	3	1	1	0
Determinants of international adjustment					
Job factors	Role clarity	1	0	0	0
	Role discretion	3	0	0	0
	Decision autonomy	2	0	0	0
	Role novelty	3	0	0	0
	Role flexibility	0	1	0	1
	Role conflict	4	1	1	0
	Role ambiguity	3	2	1	1
	Role overload	1	2	1	1
	Skill variety	1	0	0	0
	Task identity	1	0	0	0
	Task significance	1	0	0	0
	Job feedback	1	0	0	0
	Job role characteristic variety	0	1	1	0
Organizational factors	Expatriate duration	0	1	1	0
	Training	3	3	1	2
	Organizational support (logistical)	2	3	2	1
	Global integration pressure	1	0	0	0
	Experience in the host country	1	1	1	0
	International structure	1	0	0	0
	Value orientation	1	0	0	0
	Organization life-cycle	1	0	0	0
	Strategy planning, corporate policy	2	0	0	0
	Local-unit preparation	1	0	0	0
	Mentoring	1	0	0	0
	Location	2	0	0	0
	Career advancement	1	0	0	0
Selection mechanism and criteria	0	3	2	1	
Degree of parent company support	0	1	1	0	
Repatriation system	0	1	1	0	
Entrepreneurship culture	0	1	1	0	
Corporate ingenuity	0	1	1	0	
Corporate endeavor	0	1	2	0	
Company size	0	1	1	0	
Number of expatriates	0	1	1	0	
Position factors	Hierarchical level	1	3	3	0
	Spouse/family adjustment	2	1	1	0
Non-work factors	Cultural distance/difference	4	1	1	0
	Social support	5	1	1	0
	Life environment difference	0	1	1	0
Individual factors	Demographic (age, gender...)	4	10	8	2
	Family situation	0	7	5	2
	Personality	11	8	3	5
	Attitude/willingness	3	5	4	1
	Skill, ability	5	3	1	2
	Experience	6	5	4	1
Dependent variables of international adjustment					
Consequents	Job satisfaction	4	0	0	0
	Task performance	4	1	1	0
	Relationship performance	3	0	0	0
	Contextual performance	0	1	1	0
	Intention to remain/withdrawal cognition	4	0	0	0
	Commitment	2	5	5	0
	Quality of life	1	0	0	0
	Knowledge of international business	1	0	0	0

Note: The number is the frequency of the variables, constructs, or dimensions used in the sample literature.

China with the “organizational mode of association” in the modern West. The former is marked by a “distinctive network spreading out from each individual’s personal connections,” whereas the latter involves the attachment of individuals to a pre-existing structure, and then the formation of personal relationships through that structure. Fei says, “In the West, people in the same organizations apply universal moral principles to themselves and so regard each other as equals”—at least in theory. However, in a Chinese society, people tend to be viewed as “a web woven out of countless personal relationships”; each knot in the web becomes attached to a specific, particularistic ethical principle. The mechanisms for such connections are “dependence upon mutual help, mutual trust, and mutually unpaid favors.” Such social characters differentiate the in-group from the out-group (Zheng & Chen, 2005).

Applying such social characteristics to overseas assignments, Li (2004) investigated the impact of expatriate professional ties or personal ties with respect to performance, and uncovered that professional ties result in the parent company’s output control, whereas personal ties do not exhibit significant differences in either output control or behavioral control. Chin (2004) also highlights the importance of *guanxi* between the business owner and the expatriate, and proposes that the longer the expatriate’s tenure the better the relationship with the owner. Huang (2000) also concludes that Taiwanese companies treat the out-group expatriate in a more realistic manner based on rational and structural factors. In Taiwan, several studies uncovered the tendency that managers provide more resources and opportunities to and give better evaluations and appraisals for in-group members than for those of the out-group (Chang, 2003; Lin, 2002). These additional observations provide another perspective with which to view future expatriation management, particularly when the Asian countries (with a majority of Confucian culture) are on the rise.

## 5. Stages of development of expatriate management research

In order to gain a general understanding of research trends in the West and in Taiwan, we divided the papers into three periods: pre-1990, 1990–1999, and 2000 to present. Please refer to Table 7 and Figs. 1–3 for the distribution of topics, number of papers, and time periods for all the papers reviewed. Appendices A, B, C, D, and E provide the breakdown of the papers based on different categorizations. Table 7 shows that the number of papers increased from 13 to 55 to 71 in the West, and from 2 to 15 to 87 in Taiwan, for the three periods. That means that expatriate management is still a viable topic in the West, and an increasingly significant topic in Taiwan. For easier reading and comparison, the vertical axis of Fig. 1 is on a scale of 1–5 and Figs. 2–3 are on a scale of 1–25.

In the West, the three main research concerns by sequence include: before 1990 – international adjustment, selection criteria, and expatriate personality; between 1990 and 1999 – career planning, spousal issues, and international adjustment; after 2000 – international adjustment, training, and expatriate personality/repatriate management. In Taiwan, before 1990, only one spousal issue paper and one selection criteria paper were reported. The three main research concerns by sequence include: between 1990 and 1999 – training, selection criteria, and expatriate personality; after 2000 – expatriate personality, repatriate management, and training.

In the West, international adjustment has been an ongoing concern over the three time periods. Another focus seems to reflect a rational evolution of expatriate management. That is, at the initial stage individual expatriate personality and selection criteria are key points. At the second stage, at which the system has been operating for some time, expatriate career planning and spousal adjustment issues began to surface. More recently, with keener global competition, expatriate personality and training were revisited, and repatriation has become a concern reflecting the problem that 25% of repatriates leave their companies within one year of coming home (Harvey & Novicevic, 2004; Konopaske et al., 2005; Kraimer et al., 2009; Kupka & Cathro, 2007; Lazarova & Cerdin, 2007; Lazarova & Tarique, 2005; Yamazaki & Kayes, 2007).

In Taiwan, as a consequence of its shorter expatriation management experience, there is no clear path of research concerns. Yet, between 1990 and 1999, training, selection criteria, and expatriate personality are the major foci that explain the initial

**Table 7**  
Research comparison by topic for three time periods.

Years	Pre-1990				1990–1999				2000 to date			
	West		Taiwan		West		Taiwan		West		Taiwan	
Country	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Personality	2	15	0	0	4	7	3	20	8	11	24	28
Female	0	0	0	0	4	7	0	0	7	10	3	4
Spouse	1	8	1	50	10	18	0	0	6	8	5	6
International adjustment	4	30	0	0	8	15	1	7	15	21	8	9
Selecting	3	23	1	50	4	7	4	27	3	4	2	2
Staffing	0	0	0	0	3	5	0	0	5	7	3	3
Training	1	8	0	0	6	11	5	32	9	13	9	10
Compensation	1	8	0	0	2	4	1	7	1	2	4	5
Performance appraisal	0	0	0	0	1	2	0	0	2	3	1	1
Career planning	1	8	0	0	11	20	0	0	7	10	12	14
Repatriate management	0	0	0	0	2	4	1	7	8	11	16	18
Total	13	100	2	100	55	100	15	100	71	100	87	100

Note: The numbers (No.) are journal papers, including unpublished student theses in Taiwan.

concern of the FDIs based in Taiwan. After 2000, expatriate personality continues to be an important issue as described earlier, that companies in Taiwan adopted a careful selection rather than an extensive expatriate training due to resource constraints. In addition, the concern over career planning and repatriate management after 2000 shows the anxiety reported previously, that most of the companies in Taiwan cannot guarantee the expatriates a pre-planned future career after their repatriation. The two greatest concerns in the West – international adjustment and spousal issues – did not pose a threat in Taiwan mainly because of the cultural closeness, convenience of home visits, and the family attachment of spouses as mentioned earlier. In comparing expatriation management in the West and Taiwan, there are similarities as well as differences. Decision makers need to devise coping strategies if companies intend to capitalize on their expatriated and repatriated employees' international management performance.

## 6. Discussion and implications

International human resources experts agree that it is imperative to attract, select, develop, and retain employees who live and work effectively outside of their own national borders (Caligiuri, 2000; Hays, 1971). Comparing the nature of expatriation management reported in Western and Taiwanese literature, we have found several issues worthy of further discussion.

### 6.1. Expatriates

Firstly, in addition to the common focus of professional knowledge and skills, U.S. MNCs seem to place greater emphasis on expatriates' various types of adjustment, whereas Taiwanese companies pay more attention to their willingness, willpower, and patience (Jaw, 2006; Tungli & Peiperl, 2009). Lii and Wong (2008) found that many Taiwanese expatriates, especially those working in SMEs, were overloaded with different work roles. Yet, job overload has no significant effect on expatriate adjustment (Huang, 2002). Moreover, many expatriates were section chiefs in charge of fewer than 20 subordinates before the international assignment, and were commonly promoted to the position of manager in charge of more than several hundred workers. Interestingly, a good percentage of them perform outstandingly. Full discretion to make decisions and the nature of toughness and submissiveness of Taiwanese culture may explain this phenomenon.

Secondly, although willingness is positively correlated with expatriate adjustment, Lin and Wei (2005) found that the degree of expatriate personal willingness does not affect performance, such as premature return or company sales. That is, Taiwanese expatriates are resilient enough to accept overseas assignments although their initial interest may not be high. It is their willpower and patience that prompt those unwilling expatriates to perform well, and even to excel in their overseas tasks.

Thirdly, the following reasons constrain Taiwanese companies from using host country nationals in key positions: (1) Taiwanese companies mainly invest in less-developed countries where sufficient talent supply is lacking; (2) Taiwanese companies, due to limited resources, generally are unable to offer competitive compensation as do Western MNCs to attract local talent; (3) a majority of Taiwanese companies are SMEs that are very conscious of their overseas performance and cannot afford to fail in their international business, and (4) they follow the social norm of trusting the in-group expatriates who understand the culture and policy of the parent company better (Chin, 2004). As a result, Taiwanese companies prefer to staff key positions with expatriates, rather than hire local nationals.

Fourthly, female expatriates in Taiwan are noticeably fewer in number than their Western counterparts. The main reason is that career women tend to regard the family as the core of their life, especially if they have school children. In contrast to Western society, in which women are encouraged to have successful careers, women in Taiwan oftentimes refrain from taking promotions or obtaining international assignments in order to take good care of their families (Lin & Wei, 2005). Yet, single women without family obligations may be as ambitious and perform as well as male expatriates. However, recently we have observed that more married women are willing to accept international assignments due to the economic downturn and shrinking job opportunities. Fortunately, advances in information technology and the possibility of frequent home visits have enabled female expatriates to work in other countries without subjecting themselves to too much stress. Under such circumstances, more organizational support is needed with respect to providing a quality education for their accompanying children and a safe living environment in the host country.

### 6.2. Family

Literature indicates that about 21–44% of Taiwanese expatriates have their spouses' companionship (Wu, 1995a,b; Jaw, 2006), whereas the percentage of relocating spouses is about 70% in U.S.-based MNCs (Jaw, 2006; Lin, 2006). That means a majority of Taiwanese married expatriates relocate alone. In the West, the main expatriate family problem is spousal adjustment (Caligiuri, Hyland, Joshi, & Bross, 1998; Shaffer & Harrison, 2001); yet in Taiwan, the main problem is family separation with an overburdened, sometimes helpless spouse. Alienation of the couple or marital disloyalty poses another threat to the family. To remedy the problem, the company could provide the separated spouse with more organizational support, more family visits, greater telephone allowances, and more information updates.

### 6.3. Organizational systems

Since resource constrained companies cannot afford extensive expatriate pre-departure training, good organizational systems with timely on-the-job training and planned knowledge sharing from internal, external, and overseas workplaces may be established to achieve similar effects. Although the issue of expatriate overloading does not pose too much of a threat at the present

**Table 8**  
Main differences of expatriation management in Taiwan and the West.

	Taiwan (mainly SME expatriation management)	West (mainly MNC expatriation management)
Host country characteristics	<ul style="list-style-type: none"> <li>◦ Mainly invested in countries with abundant Chinese ethnics</li> <li>◦ Mainly within half-day flight which allows frequent home visits</li> </ul>	<ul style="list-style-type: none"> <li>◦ Invested in countries all over the world with diversified culture</li> </ul>
Focus of selection criteria	<ul style="list-style-type: none"> <li>◦ Personal skills</li> <li>◦ Willpower</li> </ul>	<ul style="list-style-type: none"> <li>◦ Past performance</li> <li>◦ Adaptability</li> </ul>
Focus of staffing	<ul style="list-style-type: none"> <li>◦ PCN strategy</li> <li>◦ Unable to offer competitive compensation to attract local talent</li> </ul>	<ul style="list-style-type: none"> <li>◦ HCN strategy</li> <li>◦ Hire local talent with attractive compensation package</li> </ul>
Focus of training	<ul style="list-style-type: none"> <li>◦ Concern more on host country political and legal factors</li> <li>◦ Organizational level training</li> <li>◦ Effective selection and deployment substitute extensive training</li> </ul>	<ul style="list-style-type: none"> <li>◦ Concern more on cultural distance and adaptability</li> <li>◦ Individual level training</li> <li>◦ Extensive pre-departure training including spouse and family members</li> </ul>
Female expatriates	<ul style="list-style-type: none"> <li>◦ Few in number and tend to be young, well-educated and single</li> </ul>	<ul style="list-style-type: none"> <li>◦ Equals to men</li> </ul>
Expatriate spouses	<ul style="list-style-type: none"> <li>◦ 21–44% spouse relocate with the expatriate</li> <li>◦ Fewer problem due to a majority of spouses stay at home because of:               <ol style="list-style-type: none"> <li>1. the concern over children education and aging parents</li> <li>2. expatriate's frequent home visits</li> <li>3. the uncertain expatriation duration</li> </ol> </li> </ul>	<ul style="list-style-type: none"> <li>◦ 70% spouse relocate with the expatriate in the US</li> <li>◦ More adaptability problem</li> </ul>
International adjustment	<ul style="list-style-type: none"> <li>◦ Less of a concern due to:               <ol style="list-style-type: none"> <li>1. Cultural closeness</li> <li>2. Taiwanese community in the host countries</li> <li>3. Focus on effective selection for expatriates with strong willpower</li> </ol> </li> </ul>	<ul style="list-style-type: none"> <li>◦ Concerns over international adjustment of both expatriate and spouse due to cultural distance</li> <li>◦ Expatriate family is more isolated with HCN staffing strategy</li> </ul>
Guanxi	<ul style="list-style-type: none"> <li>◦ In-group expatriate</li> <li>◦ Social network relationship</li> </ul>	<ul style="list-style-type: none"> <li>◦ Relationship is rational and structural</li> </ul>
Theory application	<ul style="list-style-type: none"> <li>◦ More resource-based theory orientation</li> </ul>	<ul style="list-style-type: none"> <li>◦ More agency theory orientation</li> </ul>

time in Taiwan, it has to be closely watched to prevent expatriates from suffering burnout. In addition, if companies plan to capitalize on the resource of single and talented females, a fair expatriation system needs to be designed. Furthermore, with the convenience of information technology and visits home due to geographic proximity, a new type of expatriation such as a commuting expatriation system may be considered. In summary, we have prepared Table 8 for readers' easier reference.

## 7. Conclusion

In the era of hyper competition, qualified human resources with a certain caliber who can travel internationally, and then perform and excel are sought-after. Effective expatriation management is the winning strategy in the global economy.

With an extensive literature review, this study unveils the evolution of expatriation management research reflecting the social concerns of the West and Taiwan over different stages. Tables 1 to 6 summarize relevant variables investigated in the last four decades, which provide a valuable and comprehensive picture of this field of study for interested researchers. Specifically, this study sets out to compare the commonly mentioned concerns of expatriation management, including selection criteria, staffing, training, the female expatriates, expatriate spouses, and international adjustment between the West and Taiwan. After an in-depth literature review, we found that *guanxi* is a very important dimension that cannot be ignored in the Asian context. As a result, we elaborated upon the influence of *guanxi* on expatriation management. From a *guanxi* point of view, the concept of agency theory may not be applied well to the manager–expatriate relationship in Taiwan. At most, it is the benevolent agency relationship as Cruz, Gomez-Mejia, and Becerra (2010) pose it.

In general, there are similar core concerns irrespective of regions, such as a given expatriate's professional knowledge, personality, and international adjustment. Context-specific concerns include such issues as the fact that Taiwanese companies care more about expatriates' personal skills and willpower, and that expatriates face the problems of job overload and family separation. Yet in the West, companies care more about past performance and adaptability, while expatriate international adjustment and spouse-related issues are the main problems.

The major limitation of this research is that we are not able to include all of the published articles on expatriation management in the West due to accessibility and time constraints. However, with the intention to report “certified knowledge,” we are confident that the papers we reviewed are representative in terms of social concerns. Another limitation is that we include students' theses for a more meaningful comparison, yet the rationale for their inclusion is described in the data sources section. In addition, we provide a separate column reporting students' theses for the reader to choose a specific basis for comparison.

Our study highlights a number of areas for future research. First, the knowledge transfer of repatriates is a vital area, as they act as a link between headquarters and foreign subsidiaries, and a great amount of information moves through their hands (Lazarova

& Cerdin, 2007; Lazarova & Tarique, 2005; Riusala & Suutari, 2004). Organizations that can leverage repatriates' knowledge sharing should be future winners. Up to the present, little research has touched upon this issue. Second, innovative expatriation systems which utilize female resources, spousal resources, commuting expatriation, shared or rotational expatriation, and virtual international assignment can be explored. Third, testing the propositions suggested by this study may show a different perspective of expatriation management, particularly for resource constrained companies. Fourth, how and why the resource constrained SMEs are successful in international expansion, particularly how the managers motivate initially unwilling expatriates to perform successfully, is worthy of investigation. Fifth, similar comparisons between the West and other Eastern societies can further fortify current research findings.

This study reviews a large body of Western expatriation management literature; the unfolding of the development of this field by stages is valuable for future studies. In addition, this study provides the firsthand information, which cannot be easily obtained by Western researchers, concerning the active FDI expatriation management practices in China and Southeast Asia that have mainly driven recent Asian economic development. Furthermore, our research results based on very different cultural contexts from previous Western and MNCs studies serve as a supplement to a better understanding of expatriation management.

As more and more resource conscious SMEs are moving to compete in the international arena, their innovation, flexibility, and speed may become future key drivers in the development of the global economy. Therefore, attending to their international management needs becomes a pressing issue. Hopefully, the findings of this study have policy and practical implications for interested parties and emerging economies.

### Appendix A. The distribution of papers reviewed by topic and by period

Item	Periods	Western studies	Taiwanese studies		Subtotal	Total
			Scholars	Students		
Selecting	Pre-1990	3	0	1	4	17
	1990–1999	4	1	3	8	
	2000 to date	3	1	1	5	
	Subtotal	10	2	5	17	
Staffing	Pre-1990	0	0	0	0	11
	1990–1999	3	0	0	3	
	2000 to date	5	2	1	8	
	Subtotal	8	2	1	11	
Training	Pre-1990	1	0	0	1	30
	1990–1999	6	1	4	11	
	2000 to date	9	4	5	18	
	Subtotal	16	5	9	30	
Female	Pre-1990	0	0	0	0	14
	1990–1999	4	0	0	4	
	2000 to date	7	1	2	10	
	Subtotal	11	1	2	14	
Spouse	Pre-1990	1	0	1	2	23
	1990–1999	10	0	0	10	
	2000 to date	6	1	4	11	
	Subtotal	17	1	5	23	
International adjustment	Pre-1990	4	0	0	4	36
	1990–1999	8	1	0	9	
	2000 to date	15	6	2	23	
	Subtotal	27	7	2	36	
Personality	Pre-1990	2	0	0	2	41
	1990–1999	4	0	3	7	
	2000 to date	8	3	21	32	
	Subtotal	14	3	24	41	
Compensation	Pre-1990	1	0	0	1	9
	1990–1999	2	0	1	3	
	2000 to date	1	2	2	5	
	Subtotal	4	2	3	9	
Performance appraisal	Pre-1990	0	0	0	0	4
	1990–1999	1	0	0	1	
	2000 to date	2	0	1	3	
	Subtotal	3	0	1	4	
Career planning	Pre-1990	1	0	0	1	31
	1990–1999	11	0	0	11	
	2000 to date	7	1	11	19	
	Subtotal	19	2	11	31	
Repatriate management	Pre-1990	0	0	0	0	27
	1990–1999	2	1	0	3	
	2000 to date	8	1	15	24	
	Subtotal	10	2	15	27	
Total						243

**Appendix B. The distribution of papers reviewed by Western and Taiwanese data source**

	Pre-1990	1990–1999	2000 to date	Total
<i>Western data source</i>				
Journal of International Human Resource Management	0	26	44	70
Human Resource Management	3	9	8	20
Journal of International Business Studies	7	17	10	34
Academy of Management Journal	0	0	4	5
Journal of Applied Psychology	1	1	3	5
Management International Review	0	0	3	3
Academy of Management Review	1	0	0	1
Journal of Management	1	2	0	3
Subtotal	13	55	72	140
<i>Taiwanese data source</i>				
National Science Research Report	0	1	10	11
Sun Yat-Sen Management Review	0	0	3	3
NTU Management Review	0	2	1	3
Journal of Management	0	1	0	1
Journal of Labor Studies	0	0	1	1
Business Review	0	0	1	1
Journal of Human Resource Management	0	0	1	1
Fu Jen Management Review	0	0	2	2
Management practices and theoretical research	0	0	1	1
Journal of Vanung	0	0	1	1
Unpublished master and doctoral theses	2	11	65	78
Subtotal	2	15	86	103
Total				243

**Appendix C. The distribution of papers reviewed by topic and by data source in Pre-1990 stage**

		S.C.	Staf.	Train.	Fema.	Spou.	I.A.	Pers.	Comp.	P.A.	C.P.	R.M.	Subtotal
Western data source	IJHRM	0	0	0	0	0	0	0	0	0	0	0	0
	HRM	1	0	1	0	0	0	0	0	0	1	0	3
	JIBS	2	0	0	0	0	2	2	1	0	0	0	7
	AMJ	0	0	0	0	0	1	0	0	0	0	0	0
	JAP	0	0	0	0	0	0	0	0	0	0	0	1
	MIR	0	0	0	0	0	0	0	0	0	0	0	0
	AMR	0	0	0	0	0	1	0	0	0	0	0	1
	JOM	0	0	0	0	1	0	0	0	0	0	0	1
Sub total	3	0	1	0	1	4	2	1	0	1	0	13	
Taiwanese data source	National Science Research Report	0	0	0	0	0	0	0	0	0	0	0	0
	Sun Yat-Sen Management Review	0	0	0	0	0	0	0	0	0	0	0	0
	NTU Management Review	0	0	0	0	0	0	0	0	0	0	0	0
	Journal of Management	0	0	0	0	0	0	0	0	0	0	0	0
	Journal of Labor Studies	0	0	0	0	0	0	0	0	0	0	0	0
	Business Review	0	0	0	0	0	0	0	0	0	0	0	0
	Journal of Human Resource Management	0	0	0	0	0	0	0	0	0	0	0	0
	Fu Jen Management Review	0	0	0	0	0	0	0	0	0	0	0	0
	Management practices and theoretical research	0	0	0	0	0	0	0	0	0	0	0	0
	Journal of Vanung	0	0	0	0	0	0	0	0	0	0	0	0
	Unpublished master theses	1	0	0	0	1	0	0	0	0	0	0	2
	Subtotal	1	0	0	0	1	0	0	0	0	0	0	2

Note:  
 S.C. = Selection criteria; Staf. = Staffing; Train. = Training; Fema. = Expatriate female; Spou. = Expatriate spouses; I.A. = International adjustment; Pers. = Personality; Comp. = Compensation; P.A. = Performance appraisal; C.P. = Career planning; R.M. = Repatriate management.  
 IJHRM = International Journal of Human Resource Management; HRM = Human Resource Management; JIBS = Journal of International Business Studies; AMJ = Academy of Management Journal; JAP = Journal of Applied Psychology; MIR = Management International Review; AMR = Academy of Management Review; JOM = Journal of Management.

### Appendix D. The distribution of papers reviewed by topic and by data source in 1990–1999 stage

		S.C.	Staf.	Train.	Fema.	Spou.	I.A.	Pers.	Comp.	P.A.	C.P.	R.M.	Subtotal
Western data source	IJHRM	2	2	2	4	2	6	2	1	0	5	0	26
	HRM	2	1	3	0	2	0	0	0	0	1	0	9
	JIBS	0	0	1	0	4	2	2	1	1	4	2	17
	AMJ	0	0	0	0	0	0	0	0	0	0	0	0
	JAP	0	0	0	0	1	0	0	0	0	0	0	1
	MIR	0	0	0	0	0	0	0	0	0	0	0	0
	AMR	0	0	0	0	0	0	0	0	0	0	0	0
	JOM	0	0	0	0	1	0	0	0	0	1	0	2
	Subtotal	4	3	6	4	10	8	4	2	1	11	2	55
Taiwanese data source	National Science Research Report	0	0	1	0	0	0	0	0	0	0	0	1
	Sun Yat-Sen Management Review	0	0	0	0	0	0	0	0	0	0	0	0
	NTU Management Review	1	0	0	0	0	1	0	0	0	0	0	2
	Journal of Management	0	0	0	0	0	0	0	0	0	0	1	1
	Journal of Labor Studies	0	0	0	0	0	0	0	0	0	0	0	0
	Business Review	0	0	0	0	0	0	0	0	0	0	0	0
	Journal of Human Resource Management	0	0	0	0	0	0	0	0	0	0	0	0
	Fu Jen Management Review	0	0	0	0	0	0	0	0	0	0	0	0
	Management practices and theoretical research	0	0	0	0	0	0	0	0	0	0	0	0
	Journal of Vanung	0	0	0	0	0	0	0	0	0	0	0	0
	Unpublished master theses	3	0	4	0	0	0	3	1	0	0	0	11
		Subtotal	4	0	5	0	0	1	3	1	0	0	1

Note:

S.C. = Selection criteria; Staf. = Staffing; Train. = Training; Fema. = Expatriate female; Spou. = Expatriate spouses; I.A. = International adjustment; Pers. = Personality; Comp. = Compensation; P.A. = Performance appraisal; C.P. = Career planning; R.M. = Repatriate management.

IJHRM = International Journal of Human Resource Management; HRM = Human Resource Management; JIBS = Journal of International Business Studies; AMJ = Academy of Management Journal; JAP = Journal of Applied Psychology; MIR = Management International Review; AMR = Academy of Management Review; JOM = Journal of Management.

### Appendix E. The distribution of papers reviewed by topic and by data source after 2000

		S.C.	Staf.	Train.	Fema.	Spou.	I.A.	Pers.	Comp.	P.A.	C.P.	R.M.	Subtotal
Western data source	IJHRM	1	5	5	6	4	6	5	1	1	3	6	43
	HRM	0	0	4	1	0	0	0	0	1	2	0	8
	JIBS	1	0	0	0	0	2	3	0	0	2	2	10
	AMJ	0	0	0	0	0	4	0	0	0	0	0	4
	JAP	0	0	0	0	2	1	0	0	0	0	0	3
	MIR	1	0	0	0	0	2	0	0	0	0	0	3
	AMR	0	0	0	0	0	0	0	0	0	0	0	0
	JOM	0	0	0	0	0	0	0	0	0	0	0	0
	Subtotal	3	5	9	7	6	15	8	1	2	7	8	71
Taiwanese data source	IJHRM	0	0	0	0	0	1	0	0	0	0	0	1
	National Science Research Report	1	0	3	1	0	3	1	1	0	0	0	10
	Sun Yat-Sen Management Review	0	1	0	0	1	1	0	0	0	0	0	3
	NTU Management Review	0	0	1	0	0	0	0	0	0	0	0	1
	Journal of Management	0	0	0	0	0	0	0	0	0	0	0	0
	Journal of Labor Studies	0	0	0	0	0	0	1	0	0	0	0	1
	Business Review	0	0	0	0	0	1	0	0	0	0	0	1
	Journal of Human Resource Management	0	1	0	0	0	0	0	0	0	0	0	1
	Fu Jen Management Review	0	0	0	0	0	0	0	1	0	0	1	2
	Management practices and theoretical research	0	0	0	0	0	0	0	0	0	1	0	1
	Journal of Vanung	0	0	0	0	0	0	1	0	0	0	0	1
	Unpublished master theses	1	1	5	2	4	2	21	2	1	11	15	65
	Subtotal	2	3	9	3	5	8	24	4	1	12	16	87

Note: S.C. = Selection criteria; Staf. = Staffing; Train. = Training; Fema. = Expatriate female; Spou. = Expatriate spouses; I.A. = International adjustment; Pers. = Personality; Comp. = Compensation; P.A. = Performance appraisal; C.P. = Career planning; R.M. = Repatriate management; IJHRM = International Journal of Human Resource Management; HRM = Human Resource Management; JIBS = Journal of International Business Studies; AMJ = Academy of Management Journal; JAP = Journal of Applied Psychology; MIR = Management International Review; AMR = Academy of Management Review; JOM = Journal of Management.



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