

**DECISION SCIENCES INSTITUTE****Strategic Global Work-Life Balance Initiatives: The Roles of the Expatriation Cycle and Gender**

Efrain Medina  
Texas A&M International University  
Laredo, TX 78041  
956-263-5659  
[efrainmedina@dusty.tamiu.edu](mailto:efrainmedina@dusty.tamiu.edu)

**ABSTRACT**

A considerable body of research has illustrated that work-life balance programs are associated with a number of key employee outcomes. Such results have brought the attention of researchers in understanding how it can influence the success of expatriates. However, there is a gap in literature regarding what type of programs are necessary for the success of female expatriates. The current study contributes to this line of research by identifying some work-life balance programs necessary in each of the stages of the expatriation cycle which can contribute to the success of expatriates, especially female expats.

**KEYWORDS:** Work-life balance programs, Female expatriates, Expatriation cycle, Work satisfaction, Life satisfaction, Stress level, Performance.

**INTRODUCTION**

As globalization and technological advancements have rapidly increased over the years, national borders have disappeared. Case in point, the world ratio to trade relative to that of output shows that it has tripled in the last fifty years (World Trade Organization, 2016). As a result, the number of international assignments are becoming critical for the vast majority of organizations that compete on this global scale. Relatedly, international assignments have multiplied for these companies.

Furthermore, there is a need to attain competitive advantage with strategic human resources management. Organizations that compete in the global market have placed high priority on developing and retaining employees with international expertise in terms of their social and human capital (Scullion and Collings, 2006). One survey showed that companies planned to increased international assignments to locations like Japan and Middle East, and that most of these international assignments will be expatriations assignments (Organization Resources Counselors Inc., 2002). Consequently, expatriation has become the main strategic choice to successfully attain competitive advantage in global markets.

Despite these opportunities, there seems to be high failure rate among expatriates that derive from personal and professional factors. One of the reasons behind the high failure rate among expatriates is the lack of preparedness to face the uncertainty of the process including culture shock, lifestyle changes, and lack of support by the organization (Hung-Wen, 2007). This situation has a negative impact for organizations and employees since expatriate failures incur financial, physical, and psychological costs. Failure in an expatriate assignment can cost up to a quarter of a million dollars for the company (Morris and Robie, 2001). Furthermore, crucial talent

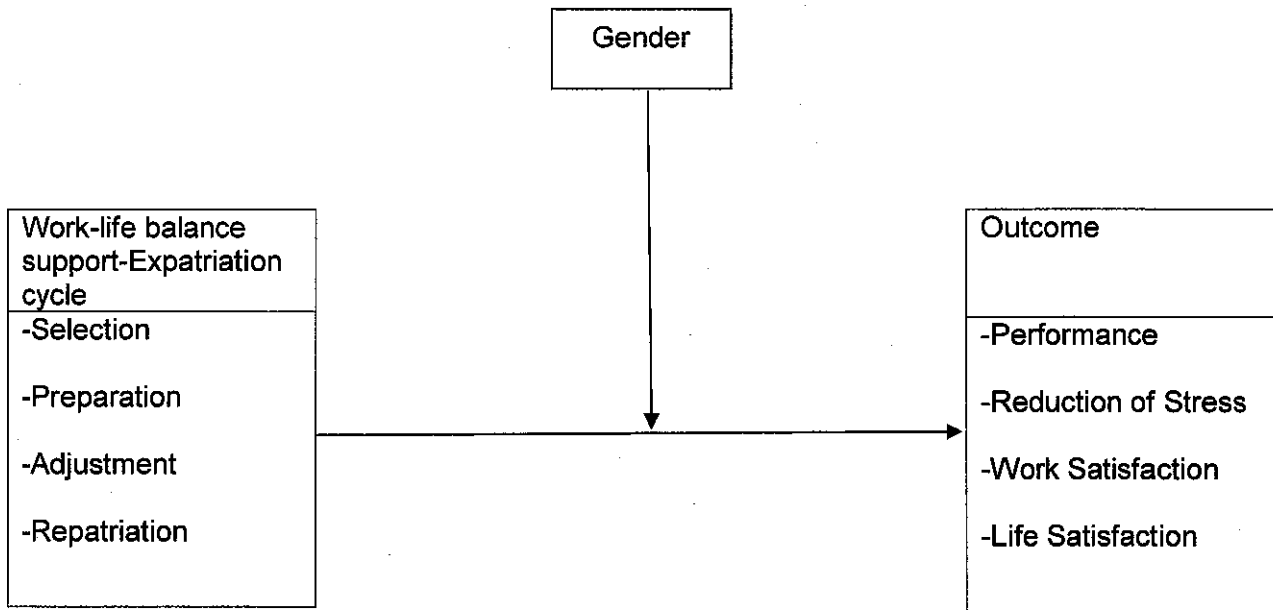
may leave the organization after the international assignment, taking with them vital knowledge and skills. Moreover, literature regarding expatriation has increased over the years with scholars illustrating different factors that lead to the failure of an expatriation assignment (Hung-Wen, 2007; Tahir and Ismail, 2007, Shortland and Cummins, 2007). One of the most important studies about expatriate failure was conducted by Tung (1982). Unfortunately, dynamic changes over time create a need for updated research. Specifically, there is a literature gap regarding human resources strategies that can be implemented to increase the likelihood of a successful expatriate assignment.

This paper proposes that work-life balance programs, especially those which target the needs of female expatriates may be rewarding intervention. Literature regarding the effects of work-life balance support and its benefits has increased over the years; however, there is a need for studies that focus on how it can influence expatriates' assignment success. Some studies have showed that factors like cultural shock, language barrier, work overload, unrealistic expectations, ineffective cultural training, and lack of support in the repatriation stage can lead to an expatriate's failure (Vallone and Ensher, 2001; Collings et al., 2007; Littrel et al., 2006). Furthermore, lack of work-life balance can lead to role conflict which could be intensified in an unfamiliar environment. Lack of work-life balance support can augment the potential of expatriate failure, especially among women. Male expatriates face several challenges in their international assignments, but such challenges for female expatriates can affect them at a greater level. These woman may well confront specific challenges which include traditional gender roles, home responsibilities, and negative stereotypes. As a result, work-life balance support can have a greater impact toward the success of female expatriates.

This paper argues the importance for organizations to offer work-life balance support as part of the human resource management functional strategy for expatriates, especially female expatriates. Although we contend that work-life balance initiatives benefit both the organization and the employees, we explicitly focus on female expatriates as a result of them facing challenges that affect them at a greater level, which can lead to the assignment's failure. Throughout the paper, we will show some of the challenges that female expatriates face during the four stages of the expatriation cycle: selection, preparation, adjustment, and repatriation. Furthermore, we will discuss some of the work-life balance support that human resources professionals can provide in each of the four stages. The main contributions of the paper are: clarification of challenges faced by female expatriates, and identification of how work-life balance support that increases the probability of an international assignment's success at each stage in the expatriation cycle. See Figure 1 which depicts the conceptual model and expected outcomes for organizations and employees.

For both men and women, work-life balance support can increase the likelihood of success in international assignments. In the survey conducted by Shortland and Cummins (2007), 51 percent of female expatriates thought that work-life balance policies increases performance compared to 17 percent of male expatriates, and 35 percent of the women felt that such policies make a favorable impact in their personal lives compare to only 15 percent of the men.

**Figure 1.**



The structure of the paper will proceed as follows. Section 2 analyzes in detail the concept of work-life balance, reviews literature regarding work-life balance programs and the expatriation cycle, develops the proposition on how work-life balance programs might affect the performance, stress level, work satisfaction, and life satisfaction of a female expatriate. Section 3 contains discussion and conclusion that is drawn from this study.

**LITERATURE REVIEW**

**Work-life balance and benefits**

As work-life balance has become important for employees, some organizations have decided to implement supportive policies with the goal of balancing work and life obligations of the employees. These initiatives are mostly voluntary by the organizations, which generally exceed legal requirements (Swody and Powell, 2007). The organizational benefits of offering work-life balance programs for the employees have been noted multiple times by scholars. Such positive outcomes include higher levels of employee engagement and commitment (Casio and Boudreau, 2010). Some studies regarding the benefits of work-life balance have shown significant support toward the implementation of certain policies. Additionally, reinforcement for work-life program attractiveness came from a recent meta-analysis by Butts, Casper, and Yang (2013), which showed that work-life balance has a significant and positive link on key employee outcomes including intention to stay and job satisfaction. It is also possible that the implementation of work-life balance programs can serve to decrease the negative outcomes caused by role conflict, which affects the employees' performance and satisfaction.

Consonant with these benefits of work-life balance support to expatriates can also serve to counteract the negative aspects of an international assignment including culture shock, language barrier, and lack of social support. Typical role expectations of expatriate include longer working hours, constant traveling, and limited time with family (Pascoe, 2005; Fischlmayr and Kollinger, 2010). As a result, work-life balance programs such as flex time, comp time, and

paid sick leave can serve to reduce the impact of these international assignment stressors, especially for women expatriates who might face more challenges than their male counterparts. Females in international assignments will entail higher risks than male expatriates as in certain countries they will meet resistance from subordinates, colleagues and clients as certain cultures the issue of gender inequality still remains (Altman and Shortland, 2008). As a result, certain work-life balance programs including flexible time, comp time, and paid-time leave will have a greater effect for female expatriates than males.

### **Role conflict and female expatriates**

When exploring expatriate challenges during the international assignment cycle (see Figure 1), it is important to consider family and work issues, along with the distinctions between them and their interactions. Based on the role conflict theory, female expatriates will most likely have greater challenges than their male counterparts as they will assume more complex roles with the international assignment. The additional roles can create an unbalance between personal and work time that can result in conflict. Focusing most of the time on one role can diminish the quality of another one (Bagger et al., 2008). This equilibrium can be more precarious for women. The study by Harris (2004) explained that female expatriates who often have greater involvement with childcare are more likely to have work-life conflict as a result of adjusting to the new role ushered in with international assignment. Additionally, some studies suggest that expatriate women tend to experience a greater level of work-life conflict in certain countries where gender inequality is still common (Crompton and Lyonette, 2006). Unfortunately, there are few such investigations as expatriate assignments have been traditionally assigned to males. Consequently, many studies are limited to the male expatriate international experience and their experience with their work-life balance.

From the extant literature on the expatriate experience, women expats tend to have a greater involvement in home activities than their male counterparts (Cinamon, 2006). However, these role expectations may be changing as a result of younger generations placing a higher priority on balancing home and work life while lowering their commitment to career development (Sturges and Guest, 2004). Nonetheless, a study by Thanerou (2008) showed that a woman's decision in taking an international assignment tends to have a greater negative effect on family members than if a male takes the same assignment.

Additionally, certain national cultures accept gender inequality which can lead female expatriate to confront an extra layer of discomfort (Altman and Shortland, 2008). As a result, work-life balance support can serve as a greater support for female expatriates than males. Thus, expectation is congruent with the general scholarship on work-life balance. A study by Burnett et al. (2010) suggested that females are more willing to take advantage of work-life balance programs than males especially in the cases where there are higher gender role expectations.

### **Work-life balance and the expatriation cycle**

It is common for expatriates to be recommended for career development. An assignment in a foreign country can create new opportunities as well as challenges for the expatriate. Such international positions can also lead to longer hours of work, employee dissatisfaction, intrusion of personal time, and family conflict. This can lead to the failure of the expatriate's international assignment creating direct and indirect costs for the company. This can also create physical and mental problems for the expatriate in the form of health problems, stress, and low self-esteem (Copeland and Nurell, 2002). There are additional challenges for female expatriates which can increase the likelihood of returning prematurely to the home country, leading to the assignment's failure. Additional challenges include facing gender inequality in some cultures

which can create lack of support by coworkers, supervisor, and clients (Altman and Shortland, 2008). As a result, literature regarding the effects of work-life balance support has increased over the years with the main goal of reducing expatriates' failure rate.

Some studies have identified factors that can influence an expatriate failure and the importance of organizational support for expatriate with the intent of preparing them for their international assignment (Shortland and Cummins, 2007; Hung-Wen, 2007; Tahir and Ismail, 2007; Littrell et al, 2006). As females' expatriate assignments have increased over the years, scholars are now exploring the challenges that women expatriate face. Some studies show the additional challenge that women expatriates face compared to males, and the importance of organizational support in the odyssey (Taylor and Napier, 1996; Harris, 2004; Fischlmayr and Killinger, 2010; Makela, Suutari, and Mayerhofer, 2011). Accepting an international assignment will require adapting to a different lifestyle that can disturb the balance between work and personal time. Because of these changes, work-life balance support can minimize such negative effects that result from the differences, which can increase the likelihood of success.

### **Work-life balance support and selection**

Selection of potential candidates for expatriate assignments is the first stage of the expatriation cycle. As there are high costs associated with international assignments, there is a need to optimize the selection process. An increase of female expatriates accepting international assignments has increased over the years, there is still room for progress. The study by Tung (2004) explained that even so there is an increase of females taking international assignments, the number of female participants is still low. Equally important, there is a misconception that female expatriates have lower probabilities of being successful than their male counterparts. This apparent bias creates reluctance to select women for international assignments, and can result in missed opportunities. The study by Tung (2004) asserted that female expatriates are likely to be successful. Because of this opportunity, organizations can implement work-life balance support to encourage gender diversity for international assignments. Organizational support can occur through screening techniques which are gender blind. Instead, selection criteria can favor personal characteristics such as willingness to embrace a different culture and language, emotional maturity, and motivation.

Motivation is also another key issue driving the low number of women accepting international assignments. The study by Collings et al. (2007) explained that the unwillingness of women to take an international assignment can be derived from the potential disruption in their personal lives. This is a barrier that leads qualified women to miss the opportunity for career development. The study by Makela et al. (2011) argued that women are willing to take an expatriation assignment, but family factors discourage them in actually accepting them. This phenomenon is more common for dual-career couples as men that accompany women expatriate may be concerned about their own stalled career development in the foreign country. Male partners are more reluctant to follow in their international assignment as this can result in being unable to acquire a job in the host country and incurring loss of income which can create problems in the relationship (Selmer and Leung, 2003). This stressor can be further amplified since in some countries it is not socially acceptable for men to be unemployed while their female partner supports the family economically.

Work-life balance support is the appropriate answer to solve this dilemma. The type of work-life balance support that would be effective in this situation is to offer the male partner a job in the host country. Literature has showed the importance of the trailing spouse on the success of the expatriate. Offering a position to the partner will increase the willingness to transfer abroad,

which can also minimize conflict between work and family role. Interrupting career advancement while being unable to find a job can create loss of self-esteem especially for males which can lead to a higher level of stress and discontent for the male spouse and the family in general (Harvey and Wiese, 1998). As a result, assistance and job support for the male partner can result in greater support for the female expatriate. Consequently, this benefit increases the chances for the project's success. The study by Linehan (2002) showed that ninety-two percent of the female respondents believed an expatriate experiences failure or success would depend on the happiness of their male spouse. Additionally, such support will serve to reduce the negative outcome of role conflict. Based on previous literature, we propose the following:

*Proposition 1A:* Work-life balance support in the selection stage will have a positive and significant relation for expatriates with the outcomes of performance, reduction of stress, work satisfaction, and life satisfaction.

*Proposition 1B:* Work-life balance support in the selection stage will have a greater positive and significant relation for female expatriates with the outcomes of performance, reduction of stress, work satisfaction, and life satisfaction.

### **Work-life balance support and preparation**

International assignments can be more challenging than local assignments as it can impose many obstacles for the expatriates. The study by Makela et al. (2011) showed that the three main obstacles for an expatriate are greater responsibilities, a higher level of risk, and cultural differences that can challenge an expatriate's ideals. This can be further intensified for women expatriates as they face more challenges than male expatriates which can increase role conflict. Cultural differences as well as relocation issues are two of the main pre-departure problems that expatriates face which can lead to the failure of the assignment. The study by Foster (2000) showed that employees and employers understand the importance of family inclusion in cross cultural training; hardly any company involved in the study implemented such support.

One of the main challenges that female expatriates face are the differences in culture. Some cultures have prejudice against females in upper positions which can undermine their effectiveness in their new role. Additionally, cultural shock as a result of encountering a different treatment for women as well as the language barrier can result in higher degree of stress, dissatisfaction, helplessness, and family conflict. Consequently, it is a priority for the organization to offer work-life balance support in the form of cross-cultural training to minimize cultural shock which will increase the likelihood of the assignment's success. The study by Littrell et al. (2006) argued that cross cultural training can lower the level of stress as well as providing the necessary skills to cope with cultural shock effects in emotional, psychological, and behavioral areas. There are three types of cross cultural training that an organization can provide: cultural awareness, cultural intelligence and language training.

Cultural awareness training's main goal is to assist expatriates to understand their own culture so they can be able to appreciate the difference with the host country's culture. One of the major incremental challenges is the gender bias in some nations. Because of this problem, it is necessary for cultural awareness training to incorporate the cultural shock of a different treatment towards women. The study by Littrell et al. (2006) argued that cultural awareness training can lead to effective expat adjusting to the new culture as well as decreasing the probability of early returns. This is more salient when women are transferred to countries that are known to have high levels of gender inequality. Some societies follow certain norms and cultural traditions that limit the business decisions of females which creates barriers toward the project's success like in traditional Asian countries (De Cieri and Bardoel, 2009). Understanding

the culture before being transferred can influence certain outcomes including level of stress, chances of success, and work and life satisfaction.

The second type of pre-departure training that shows promise for successful adaptation is cultural intelligence training. Cultural intelligence can be defined as an individual's capability to effectively manage relationships with people from diverse cultural backgrounds (Early and Ang, 2003). Literature demonstrating the benefits of cultural intelligence has grown over the years. Cultural intelligence can be classified as a crucial intercultural competency that is necessary for any expatriate that wants to be effective in their international assignment (Ang et al. 2007). This is more relatable to female expatriates as relocation to a traditional country with gender roles expectations can aggravate relationships with the host country's citizens. Cultural intelligence consists of four constructs (motivational, behavioral, meta-cognitive, and cognitive) that can help decrease the effects of cultural shock and increase the likelihood of project success. The study by Rose and Ramalu (2010) showed that cultural intelligence can improve the performance of expatriates as it increases the adaptation capabilities of the employee.

The third type of training which facilitates expatriate adjustment is language training. Language training can provide the means for expatriates to demonstrate their determination in adapting to the host country's culture as well as having more fluent conversations with the natives. The study by Selmer (2006) showed that proficiency in the host country's language has a positive association with interaction adjustment, life adjustment, and work adjustment. If the female expatriate has family members, it is also necessary for them to undertake and complete both cultural awareness and language training. Lack of understanding of the host country's language can create discomfort, stress, negatively impact job performance and engender dissatisfaction among the female expatriate and the family. The study by Bochner (1981) suggested that acquiring a second language can help to respond more effectively to the differences in the host country's culture.

It is crucial for organizations to offer cross-cultural training in the form of cultural awareness, cultural intelligence and language training. Past literature has showed that such support can lead to the success of expatriates especially for females when they are relocated to countries that are known to still have gender bias. Based on extant literature, we propose that:

*Proposition 2A:* Work-life balance support in the preparation stage will have a positive and significant relationship for expatriates with the outcomes of performance, reduction of stress, work satisfaction, and life satisfaction.

*Proposition 2B:* Work-life balance support in the preparation stage will have a greater positive and significant relation for female expatriates with the outcomes of performance, reduction of stress, work satisfaction, and life satisfaction.

### **Work-life balance support and adjustment**

A woman expatriates and her family's inability to adjust to their new living and work environment can increase the likelihood of the assignment's failure which can be costly to them and the organization. As a result, organizational support in both work and home life are crucial to succeed in the international assignment. As explained earlier in the paper, international assignments creates different challenges in both living and working environments which are amplified because of gender bias and family responsibilities. Some studies have identified some living and working conditions that require adaptation including accommodations, school arrangements, housing chores, culture, climate, longer working hours, and frequent meetings (Shortland and Cummins, 2007; Makela, Suutari, and Mayerhofer, 2011). Lack of organization

support on both working and living environment can result in a female expatriate's dissatisfaction in their working and living role, increased in stress level, and lower performance.

Acculturation of the new living and working environment is one of the main priorities for the female expatriate and her family. The female expatriate and her family will determine the amount of time and level of success to acculturate to the new culture and living environment. Because of the difficult process in adapting to a new lifestyle, it can result in role conflict as their will be unbalance between working and personal time. In order to increase the likelihood of acculturation success, there is a need of work-life balance support in the form of additional cross cultural training in the host country. Female expatriates and her family need to receive further cross cultural training in the form of cultural awareness and language training. Training should be assigned occasionally in the first 3-6 months of the international assignment as it can be consider the most crucial time for the female expatriate and her family.

As explained by Maleka et al. (2011) one of the major reasons for failing the international assignment is the difficulty of the family in adapting to the new culture. Representative of the countries that are locals of the host country should be assigned to assist the female expatriate and her family in time of uncertainty. There will be times in the expatriation process when the female expatriate will deal with difficult situation, and a local consultant can be the best form that the organization can support them. Additional information offered by the consultant regarding culture, norm and values, and language can help speed up the adjustment process. This is more important for female expatriates as some countries still have gender prejudice especially in a working relation between a men and a women. The study by Hutchings and Ratnasari (2006) showed that support from the parent company creates a positive effect to the adjustment factor.

The first weeks for a female expatriate can be regarded as the most difficult in the odyssey. Total concentration at work can mean less time with housing chores which can create family problems. Long hours of work can interfere with family time which can cause stress, dissatisfaction, and an increase of likelihood of the assignment failure. The lack of time for housing responsibilities as well as longer working hours can contribute to job burnout for the female expatriate. The study by Bhanugopan and Fish (2006) argued that one of the problems for expatriates is job burnout which in most occasions occur as a result of role conflict. Because of such issue, it is necessary for offering work-life balance support in the form of home chores assistance and childcare. Fischlmayr and Kollinger (2010) explained that additional support in housing chores which include cleaning, cooking, and child care can increase family time which can decrease work-family tension. This support will depend if the female expatriate has a family; however, we can assume that this type of support will be useful regardless of age and family composition.

Pressures within the family regarding the adjustment in the host country can facilitate the disruption of family equilibrium increasing the likelihood of failing in the international assignment. Those female expatriates that have children tend to focus their attention in different factors that will affect the children's future including educational accommodations. During this stage, it is common for female expatriates to support their children in adjusting to the new school environment as well as facilitating their interaction with children of the host country. Failure to do this can result in dissatisfaction of the children which can disrupt the family's unity. This effect can be amplified depending on the host country's culture. As argued by Harris (2004) in countries with traditional social-cultural norms regarding gender roles, female expatriates will face additional challenges as there will be a negative perception if child related issues are issued to the male partner. The negative effects of this issue can be reduced by the



organization supporting the female expatriation in the form of arranging all school-related issues which includes paying for all educational expenses and locating a school that can provide in some form a continuation of the home country's curriculum. The study by Sims and Schraeder (2005) argued that if the company cover all educational expenses of the expatriate's children, it will facilitate the re-assimilation process of the home country school system after the international assignment is completed.

The adjustment to a different lifestyle is a difficult process that can determine the failure or success of the international assignment. As a result, it is important for organization to support and enhance the adjustment process of female expatriates. From the information of past studies, we can propose that:

*Proposition 3A: Work-life balance support in the adjustment stage will have a positive and significant relationship for expatriates with the outcomes of performance, reduction of stress, work satisfaction, and life satisfaction.*

*Proposition 3B: Work-life balance support in the adjustment stage will have a greater positive and significant relation for female expatriates with the outcomes of performance, reduction of stress, work satisfaction, and life satisfaction.*

### **Work-life balance support and repatriation**

Repatriation is the final stage that a female expatriate needs to endure to finalize their international assignment. Repatriation is an important stage in the expatriation cycle as is the return of employees that have acquired international experience. However, retention of expatriates that have acquired international experience tend to be one of the most difficult challenges for organizations (Scullion and Collings, 2006). A common main uncertainty for expatriates especially females can be expressed in the organization lack of emphasize in explaining what will be their position on the company and advancement opportunities. The study by Taylor and Napier (1996) showed that some of the frustration for female expatriates is the lack of appropriate positions for them, or being assigned positions that tend to use their international skills and knowledge at a minimum level. Such uncertainty about their future can create an expatriate turnover rate up to 30% to 40% after two years of the completion of the international assignments (Stroh, 1995). This is a problem for many companies as they do not develop programs which can create an effective transition for the returning expatriates. The uncertainty of what to expect when they return home can create stress and dissatisfaction in their working and personal roles which can increase the likelihood of failing the international assignment. The study by Lazarova and Caligiuri (2002) argued that the expatriate's perception regarding the level of support by the organization can determine whether the employee will stay or leave upon the repatriation stage of the expatriation cycle. As a result, work-life balance support in the form of clear communication of the position that will be assigned in their return and career development opportunities can create a positive effect in their work and life satisfaction, stress level, and performance in the international assignment.

As the number of female expatriates are increasing every year, there is the need to develop policies that would offer them a position ready for their return. The survey by Fischlmayr and Kollinger (2010) showed that female expatriate tend to be able to have a higher concentration in their international assignment if they know what to expect in their return. Knowing the different opportunities and the position that will be assigned in their return can also be seen as an incentive to succeed in the international assignment. Additionally, losing returning female expatriates can impose a direct and indirect cost for the company. Offering them a secure position when they return to the home country is essential to retain them. There is also a need

to communicate the promotional opportunities that will be available when they return home. The study by Bolino (2007) argues that those expatriates that have guaranteed promotion opportunities will rarely leave the organization as there is a higher cost. Successful female expatriates can be considered a competitive advantage for the company as they can share their experience with other employees, and can be considered an inspiration for females to achieve high level positions (Taylor and Napier, 1996). Offering them a secure position as well as promotion opportunities will facilitate the transition to the home country while benefitting the company by retaining personnel with international knowledge and skills.

As international competition increases, there is a need to accumulate personnel with international experience. This type of support can help the female expatriate to focus in adapting to the new culture and lifestyle during the adaptation stage instead of adding pressure of not knowing what to expect in their return. As a result, we can argue that work-life balance support creates positive outcomes for female expatriates. From the information of past studies, we can propose that:

*Proposition 4A:* Work-life balance support in the repatriation stage will have a positive and significant relationship with expatriates in the outcomes of performance, reduction of stress, work satisfaction, and life satisfaction.

*Proposition 4B:* Work-life balance support in the repatriation stage will have a greater positive and significant relation for female expatriates with the outcomes of performance, reduction of stress, work satisfaction, and life satisfaction.

## DISCUSSION AND CONCLUSIONS

This paper attempts to illustrate the importance of organization support in vital employee and organizational outcomes for all expatriates. The goal of this research was to analyze the importance of offering work-life balance programs in their expatriation cycle, especially for female expatriates. These are compelling topics focusing on the challenges faced by male and especially female expatriates, and their require support from their organizations. Furthermore, the increase of female expatriates during recent years has generated interest for scholars to identify if there are any variances in the type of organization, and their impact on reduction of stress, performance, life and job satisfaction. The insights offered by this study have identified potential contributions to organizational and employee performance and well-being. Still, there are constraints in this preliminary study. First, our propositions are drawn from the literature and need empirical tests. Second, the literature is mostly U.S. based. Thirdly, the study has only addressed challenges faced by heterosexual married couples. Overall, both men and women win and the organization and family too when work-life balance programs are tailored for expat needs, especially for female expats.

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