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ARTICLE

How does colonial history matter for expatriate adjustment? The case of Brazilians in Portugal

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Abstract

The literature on expatriation typically assumes that cultural and institutional familiarity facilitates expatriate adjustment. This assumption underplays the role of the historical context, especially the influence of painful colonial pasts that often lie beneath such familiarity. In addition, seeking to capture expatriate adjustment as a single measure, such literature does not engage with the differences in the extent to which expatriates achieve cognitive, behavioral, and affective adjustment. Using a qualitative study addressing the work experiences of Brazilians living in Portugal, we argue that to fully understand expatriate adjustment, we must pay attention to the historical colonial relationship between the expatriate's home and host country. Specifically, we discuss the importance of social representations of history for how expatriates narrate, interpret, and act in response to their experiences. Our research makes two theoretical contributions. First, we explain how historical colonial relationships affect expatriate adjustment and how this leads to adjustment only being partial. Second, we develop a nuanced understanding of expatriate adjustment by drawing attention to its three interdependent dimensions (cognitive, behavioral, and affective), showing that an expatriate may be well adjusted in one dimension but less adjusted in another. We call for organizations to engage more, and more critically, with history.

Keywords Expatriate adjustment · History in international business · Narratives · National identity · Qualitative research · Representations of colonial history

Introduction

International business (IB) research has long recognized the importance of expatriate adjustment (Andersen, 2021), usually defined as the development of a person–environment fit acceptable to the expatriate (Nolan & Morley, 2014). Adjustment influences expatriates' performance in their role (Lazarova & Thomas, 2012) and possible premature return (Bhaskar-Shrinivas et al., 2005), and, for the expatriates themselves, affects job satisfaction and commitment (Haslberger et al., 2014), quality of life (Biswas et al. 2022), and career success (Mello et al., 2023). However, generally, studies of adjustment have under-explored the importance of context. In particular, they have not considered how the adjustment of expatriates from a specific country might be influenced by historical relations, for example a colonial past, between their country of origin and the host country. Typically, contextual differences in adjustment have been subsumed in the requirement of many top journals to provide a 'universal' understanding of the phenomenon. With few exceptions (e.g., Chapman et al., 2008), the application of

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cross-national distance constructs, such as cultural and institutional distance (Beugelsdijk, 2022), has produced studies that offer little insight into the influence of specific contexts, characterized by unique historical relations between the home and host country.

By not engaging with the role of history (Decker et al., 2021; Jones & Khanna, 2006), the literature is yet to fully understand which factors help and hinder expatriate adjustment, and under what circumstances. Instead, research has relied on taken-for-granted claims that similar cultural and institutional settings invariably facilitate adjustment (Dimitrova et al., 2023). It is typically argued that adjustment is more likely to be successful when the foreign location is 'familiar' and when language and culture are recognized and understood (Varma et al., 2023). This argument downplays the fact that a historically rooted familiarity can be underpinned by both positive and negative prior experiences, assumptions, and attitudes toward the familiar location, culture, and people (Tung, 2008), and that its outcomes might be complex and far from positive. For example, as research has shown (e.g., Śliwa et al, 2023), the use of a shared language in communication between people from ex-colonies and their ex-colonizer countries can result in a negative experience for the former. Specifically, expatriates from ex-colonies, who speak the shared language with an accent unique to their country of origin, are likely to find themselves on the receiving end of pejorative national stereotypes and judgments activated through their accents. In this paper, we address the current confusion in the expatriation literature in relation to the link between contextual similarity and adjustment. We take as our starting point that contexts may appear to be culturally and institutionally similar, but that such similarity is often based on them sharing a complex history of unequal power relations, domination, and exploitation (Ashcroft, 2012), which can negatively influence expatriate adjustment.

Furthermore, the empirical focus of studies has traditionally been on expatriates from the so-called Global North, or 'WEIRD' – Western, educated, industrialized, rich, and democratic (Tung, 2023) – countries. As such, expatriate adjustment research has generally excluded expatriates from the so-called Global South countries. Indeed, the term *expatriate* has predominantly been used in the IB literature with reference to citizens from ex-colonizer countries (often described as 'developed' countries). By contrast, those from ex-colonies (typically labeled as 'developing' countries) have usually been referred to as *migrants*. Though the expatriation literature has rarely explicitly acknowledged the role of history or colonialism, such selective use of the 'expatriates' and 'migrants' terminology contributes to the perpetuation of inequalities derived from colonialism (Kunz, 2023). Moving away from such distinctions, we define expatriates as "legally working individuals who reside temporarily in a country of which they are not a citizen in order to accomplish a career-related goal, being relocated abroad either by an organization, by self-initiation or directly employed within the host country" (McNulty & Brewster, 2017: 46). This definition goes beyond the much-studied expatriates assigned to work in a foreign country by their company to include people across the world who move temporarily to another country for work, whatever their nationality, ethnicity, race, gender, socioeconomic status, or qualifications.

Studying expatriation from the ex-colonies to ex-colonizers is not only scholarly important but also socially relevant. On the one hand, research points to the mixed effects of the colonial legacy on expatriate experience (Richardson, 2022), and some studies have shown that expatriates from ex-colonies are subject to prejudice in ex-colonizer countries (Śliwa et al., 2023). On the other, we know that the number of expatriates from ex-colonies moving to the former European colonial powers is increasing (Hajro et al., 2023). These nationals of ex-colonies move to the former colonizer countries partly because of familiarity with the culture and language (Fitzsimmons et al., 2020) and the assumption that this will help with adjustment (Vromans et al., 2013), and partly because of bilateral agreements that give them certain rights (e.g., residency and employment) in the host country. Understanding and supporting the adjustment of expatriates from ex-colonies in ex-colonizer countries is important for building inclusive organizations and societies.

We approach the topic of adjustment through a focus on the salience of colonial history in Brazilian expatriates' narratives of their experiences in Portugal. We argue that this salience of colonial history helps explain the partial adjustment of these expatriates. Following management researchers who have drawn attention to the present-day effects of the colonial past in organizations (e.g., Frenkel & Shenhav, 2003; Śliwa et al., 2023; Yousfi, 2014), we ask: *How does colonial history matter for expatriate adjustment?*

To develop a rich understanding of adjustment from the expatriates' own perspectives, we interviewed expatriates from Brazil who were working, or had worked, in Portugal. We found that despite the cultural and institutional similarities between the two countries, the adjustment of the expatriates was only partial. We identified two key narratives – the '*Brasilidade'* narrative and the 'marginalized Brazilian' narrative – through which the participants made sense of and rationalized their experiences of working in Portugal. The '*Brasilidade*' narrative is infused with a sense of national sovereignty and pride, whereas the 'marginalized Brazilian' narrative is underpinned by the participants' perception that the Portuguese view the Brazilians as inferior to them. Both narratives helped us understand why the expatriates struggled to achieve adjustment.

Our research makes two theoretical contributions to a more nuanced understanding of IB and, in particular, of expatriate adjustment. First, we contend that colonial historical relations between country dyads, i.e., an expatriate's country of origin and the host country, can negatively influence adjustment. Specifically, in the case of expatriates from ex-colonies in ex-colonizer countries, representations of colonial history influence how people narrate, interpret, and act in response to their experiences in the host country. As such, expatriates might develop the knowledge of the host country (cognitive adjustment) but they might continue to act (behavioral adjustment) and feel (affective adjustment) in ways that preclude the possibility of them achieving a comfortable person–environment fit. In other words, their adjustment may remain only partial. Through our analysis, we also develop a nuanced understanding of adjustment by drawing attention to its distinct, albeit mutually interdependent, dimensions (cognitive, behavioral, and affective). Further, our research makes an empirical contribution to IB knowledge by offering insights from the under-explored context of Brazilian expatriates in Portugal.

In the remainder of the paper, we first locate our research in the literature on expatriate adjustment, highlighting the need to address the historical context. We then discuss relevant insights from research, explaining the importance of social representations of history for people's interpretations of the present. This is followed by a presentation of the context of our study and the research methodology. Subsequently, we analyze the empirical findings and discuss the study's contributions and limitations. We conclude with outlining implications for practice and policy, and future research directions.

Expatriate adjustment

The literature on expatriation and expatriate adjustment emerged from the internationalization of American and European companies from the 1980s onwards (Kunz, 2023). It reflected the geographic importance of Western economies, and the focus on individuals going from the 'WEIRD' countries to the ex-colonies, although an early – and highly cited – study by Tung (1981) also included Japanese expatriates. Studies were initially, and are still largely, conducted with assigned expatriates sent to another country by multinational enterprises (MNEs; e.g., Chang et al., 2012). This widened, from 2000 onwards, to incorporate other categories, such as self-initiated expatriates (SIEs), who are not sent abroad by MNEs but take up employment for a limited time in their new host country (Sédès et al., 2023), and international migrants who move to a country with the intention of staying there (McNulty & Brewster, 2017).

The literature addressing the adjustment of expatriates uses a variety of terms (acculturation, adaptation, adjustment) to examine the same phenomena, but the fundamental concern is with the expatriate's ability to fit into their new country (Nolan & Morley, 2014). In a series of publications, Black and colleagues (Black & Stephens, 1989; Black et al., 1991) offered a short survey of how adjusted people felt in their (rather poorly defined) work, interaction, and general environments. In the IB literature, these studies had considerable influence, sparking others to use the same or similar surveys to explain the antecedents of whether or not expatriates were adjusted (see meta-analyses in Caldwell et al., 2024; Hechanova et al., 2003). The use of scales to measure adjustment, however, has been critiqued (Haslberger et al., 2014; Lazarova & Thomas, 2012) as it struggles to accurately capture expatriate adjustment because of four weaknesses: (1) the implication that adjustment can be expressed as a single measure; (2) the conflation of the cognitive, behavioral, and affective dimensions of adjustment; (3) the lack of understanding of the complex link between the time spent in the host environment and adjustment; and (4) the absence from the analysis of context and history. We address each issue in turn.

Adjustment as a single measure

The dominant stream of research has been working with Black et al.'s (1991) 'comprehensive model of international adjustment', and applying Black and Stephens' (1989) 14-item measure of adjustment along a Likert scale. This way of evaluating adjustment results in a single measure does not leave space for exploring whether an expatriate could be considered adjusted in some ways but not in others. Over the years, expatriate research has developed an increasingly nuanced and complex understanding of the factors influencing expatriate adjustment as well as the different forms of expatriation (Caldwell et al., 2024). However, survey-based studies of expatriate adjustment continue to use a single measure of adjustment (e.g., Davies et al., 2015). Considering the nuances involved in adjustment, particularly the cognitive, behavioral, and affective dimensions identified in the expatriate experience, qualitative research (e.g., Peltokorpi & Zhang, 2022) indicates the need for a more nuanced approach.

The conflation of dimensions of adjustment

Research in other disciplines had long noted that adjustment takes place in different dimensions. Thus, for example, Kim (1979, 2001), one of the earliest researchers working in communication sciences, championed the idea

that adjustment had cognitive, behavioral, and affective dimensions. A move to a new country creates an extension of knowledge, and learning that the subjective meaning of situations and communication differs from that in the original country. The trajectory of such learning will not be a straight line but will, in most people, increase with time spent in the new country. Simultaneously, the individual will gradually learn new behaviors that will help them to operate in the new country. Alongside these learnings, there will be the psychological well-being of the individual concerned. Conducting studies of expatriate adjustment in a way that pays attention to the three dimensions of adjustment opens up the possibility of enriching the IB literature on adjustment (Andersen, 2021; Biswas et al., 2022; Caldwell et al., 2024) by recognizing that an expatriate may be well adjusted in one dimension (e.g., knowing a lot about the host country) but less adjusted in another (e.g., feeling miserable).

Time spent in the host country

The literature on expatriate adjustment is underpinned by the assumption that adjustment progresses over time (Hippler et al. 2017), with authors theorizing that the development of adjustment can be graphically represented as a U-curve (Bhaskar-Shrinivas et al., 2005). However, much of the empirical research on expatriate adjustment has used samples that aggregate people who have been in the country for, for example, 5 days, 5 weeks, 5 months, and 5 years. This is because much of the research has been conducted through surveys involving small numbers of expatriates (e.g., Uddin et al., 2020), and researchers have been forced to collate their findings, so that their statistical analyses include large enough numbers to be reliable. Coupled with this, to date, few studies have adopted longitudinal designs in researching expatriate adjustment (e.g., Wang & Takeuchi, 2007; Zhu et al., 2016). Although existing studies have generated important insights into expatriate adjustment over time, there is still room for learning more, particularly through qualitative research, about the temporal dynamics of adjustment and its complexities in relation to the cognitive, behavioral, and affective dimensions of adjustment.

The absence of (historical) context

Given the demands from most top journals for a generalizable, 'universal' understanding of phenomena, the use of surveys in expatriate research has downplayed the importance of context, and in particular, historical context. The literature finds that expatriate adjustment is the outcome of the individual's prior experience and pre-departure knowledge (Black, 1988), motivation to expatriate (Firth et al., 2014), cultural intelligence (Song et al., 2023), language ability (Peltokorpi & Zhang, 2022), gender (Fitzsimmons et al., 2020), social status (Stahl & Caligiuri, 2005), and individual emotional intelligence (Caldwell et al., 2024). Some attention is also paid to what happens in the employing organization so that we know that expatriate adjustment is positively influenced by organizational and collegial support (Biswas et al., 2022), innovative work (Hussain & Zhang, 2022), and feedback (Armon et al., 2023). Local support appears to be particularly important, as ethnocentric behavior among locals, for example, negatively affects social interactions (Maertz et al., 2016) and can limit adjustment (Varma et al., 2021).

In the extant research, the importance of context, and particularly the role of historical relations between the expatriate's home and host country, has been under-examined. First, given the survey methodology and the (usually) small numbers involved, researchers are generally forced to aggregate nationalities and are therefore unable to draw conclusions about national differences (Haslberger et al., 2014). By aggregating and generalizing data, these studies are restricted in how far they can explore institutional and cultural nuances and tend to homogenize countries (Tung, 2008) according to their supposed cultural dimensions (McSweeney, 2024) that are then used to explain adjustment (Fitzsimmons et al., 2020). Second, it has, specifically, almost entirely ignored the influence of colonial history on the working relationships, and adjustment, of the increasing numbers of people who move between ex-colonies and ex-colonizer countries (Kunz, 2023). Focusing on expatriates from these groups gives us the opportunity to build knowledge about their experiences and to learn about the possible influences of the historical colonial relations between their home and host country on these experiences and, consequently, on their adjustment.

Building on the above overview, we argue that there is room for deeper research into expatriate adjustment to create a more comprehensive and richer understanding of how expatriates adjust. In particular, we see promise in qualitative studies with participants from the so-called Global South countries that would place an individual's adjustment within the context of the historical relations between their home and host country. Such studies also advance broader IB concerns because they build an understanding of global phenomena in different contexts (Hymer & Smith, 2024), and help us understand how different national identities influence work and workers' identities and behaviors (Vaara et al., 2021).

To gain richer insights into expatriate adjustment, we follow Hippler et al.'s (2017: 89–90) definition of adjustment as "the combined result of domain-specific change processes in the behavioral, cognitive, and affective dimensions as evaluated by the expatriate and their environment. It includes the subjective well-being and social functioning of the individual, each arising from the combined need fulfillment and demand satisfaction that is taking place in the dynamic

interaction between the individual and their environment, and influenced by the situation in which it occurs."

Empirically, we focus on Brazilian expatriates' narratives about their experiences of working in Portugal. In doing so, we pay particular attention to the salience of representations of Brazil–Portugal colonial history in the expatriates' narratives, and discuss the insights these narratives offer into their adjustment.

The influence of representations of history on individuals' responses to experiences in the present

In considering how colonial history matters for expatriate adjustment, we are interested in particular *representations of history* and their influence on people's identities and responses to experience, rather than in history as collective remembering (Pennenbaker et al., 1997) or collective memory (Halbwachs, 1950). We take inspiration from Liu and Hilton (2005: 537) who argue that "history provides us with narratives that tell us who we are, where we came from, and where we should be going… A group's representation of its history will condition its sense of what it was, is, can, and should be, and is thus central to the construction of identity, norms, and values." Groups, such as nations, construct their own representations of history, which include specific stories about past events, with "concrete information about the particular times, places, and actors involved in the event" (Wertsch, 2021: 77), and follow culture-specific, schematic narrative templates, which "include abstract roles like 'enemy', 'villain', or 'hero' and generic actions like 'attack', 'defeat' or 'triumph' that the narrative template ties together into a temporally organized and meaningful whole" (Kaidesoja, 2024: 3). Since representations of history serve the objectives and political interests of the group that has developed them, they are inevitably biased (Halbwachs, 1950), and draw on a selective presentation and use of facts (Evans, 2003). Social representations of history (Moscovici, 1988) typically consist of a set of components. These include a foundational myth for a given society, which serves to legitimize its political and social arrangements (Malinowski, 1926), narratives of origin, which are temporally organized stories about significant events and people, and the group's 'timeless essence', which encapsulates its shared experience and culture, and which is transmitted through educational institutions and mass media (Hamilton et al., 2002). Representations of history influence and justify the ways in which the group's members relate to other groups, and how they respond to the challenges they experience in the present (Liu & Hilton, 2005).

History thus plays a key role in the construction and perpetuation of nationhood as an imagined community (Anderson, 2006; Wertsch, 2021). It provides a symbolic representation of a country (Billig, 1995) and justifies national identity (Vaara et al., 2021). National identities serve as institutionalized social mechanisms that offer social identification, and provide citizens with meaning for past events and traditions (Anderson, 2006). Representations of history define and justify the place a country's citizens believe they hold among other nations. The historical narratives that people internalize about their nation as they grow up within the educational and cultural milieu of their home country (Christou, 2007) – and which influence the way they think about themselves – are usually taken for granted. However, as historians have argued, using examples such as young Germans confronted with their country's Nazi past when visiting other countries (Conrad, 2003), these narratives are often challenged in intercultural encounters, which are the core of expatriation. In such encounters, people come to realize that the image of their country and nation that they had been socialized into differs from the image that functions in another country.

In the case of countries whose historical links have become contentious, representations of history are not simply different but can be conflicting (Liu & Hilton, 2005), creating nationality-based feelings of separation between 'us' and 'them' (Christou, 2007). Specifically, the social representations of colonial history will differ significantly in the former colonizer and colonized countries, as illustrated by the example of Portugal and Brazil (Mignolo, 2012). In this particular case, the Portuguese control of Brazil lasted more than three centuries but ended two centuries ago (independence was declared by Brazil in 1822 and finally accepted by Portugal in the Treaty of Rio de Janeiro of 1825). The historical narratives produced in Portugal have traditionally emphasized the country's role as the 'conqueror hero' and 'good colonizer', and have tended to idealize colonization as a benevolent process (Cabecinhas & Feijó, 2010). By contrast, the narratives generated in Brazil have portrayed Portugal as the 'conquering oppressor' and have stressed the exploitative and pervasive negative effects of Portuguese colonialism on Brazilian society (Schwarcz & Starling, 2015).

The existence of such stark contrasts in social representations of history gains further significance if we accept that, through influencing national identity (Billig, 1995; Vaara et al., 2021), historical narratives also influence how people respond to present-day experiences and challenges (Hong et al., 2001), especially when they find themselves outside their home context, as expatriates do. What matters here is that historical narratives carry the emotional and ideological implications (Billig, 1995) of the collective experience (Rimé, 1997). History "offers concrete events and people with widely shared emotional resonance whose relevance to the current situation is open

to interpretation" (Liu & Hilton, 2005: 539). This suggests that members of a nation are likely to share not only the narratives about the historical past but also the emotional responses to these narratives, and that these stories and their emotional resonance are likely to influence how people interpret and respond to the situations they encounter (Anderson, 2006; Billig, 1995). For example, historical atrocities such as invasion, colonialism, and slavery, "leave psychological legacies that have a direct bearing in intergroup relations in the present between those groups that had wronged and those that were wronged" (Vallabha et al., 2024: 23). For this reason, scholars advancing critical approaches to adjustment have argued that for members of the historically wronged group, such as individuals from formerly colonized nations, colonial histories negatively influence their adjustment in European countries (Bhatia & Ram, 2009).

As Hilton and Liu (2017) summarize, in narrating intergroup conflict, and in elaborating on the roles of heroes and villains in this conflict, social representations of history: (1) provide people with the basis to identify friends and enemies; (2) help people maintain a feeling of collective pride and eliminate a sense of collective guilt and shame; and (3) offer people 'lessons of history' and, in doing so, influence how they respond to current challenges. In particular, for historically traumatic events (Mohatt et al., 2014), such as colonization, social representations of history will shape people's perceptions of the situational context and their responses to it (Ashcroft, 2012). We draw on these insights from knowledge about "how the past weighs on the present" (Liu & Hilton, 2005: 537) to consider Brazilian expatriates' experiences and adjustment in Portugal.

Methodology

To generate insights into how expatriates understand and attribute meanings to their experiences, and to develop a nuanced conceptualization of expatriate adjustment, we adopted an interpretivist approach and constructed a composite narrative (Johnston, 2024).

Data collection

The literature on expatriation includes little in-depth research addressing the expatriate and their lived experience (Szkudlarek et al., 2021), approaching adjustment as separate from experience. We, by contrast, conducted three initial unstructured interviews with Brazilians who have worked in Portugal to understand what it is like to be a Brazilian expatriate in that country. Based on insights from these interviews and a selection of Brazilian (*Folha de São Paulo*) and Portuguese newspapers (*Observador*, *O Público*, and *Diário de Notícias*), we built a semi-structured protocol used for the subsequent 42 interviews to capture how Brazilians narrated their experiences in Portugal. We conducted the interviews between 2019 and 2021, via Skype, WhatsApp, and phone calls.

Potential participants were identified from social media platforms, personal connections, and Brazilian companies in Portugal, with help from the *Confederação Nacional da Indústria* (National Confederation of Brazilian Industry). We identified ten Brazilian companies in Portugal with subsidiaries with more than 80 employees[1]. We interviewed 15 assigned expatriates (AEs) sent to Portugal by seven of the identified companies, four Brazilian inpatriates sent to Portugal by one foreign multinational company, and 23 self-initiated expatriates (SIEs) who represent most of the Brazilians working in Portugal. To reflect the varying trends in Brazilian expatriation to Portugal, we included those expatriating between 1995 and 2020 and collected data from people with a diversity of backgrounds, education, and number of years in that country. Of the 42 expatriates, ten have returned to Brazil, 12 mentioned plans to move to another European country, ten were still expatriated through a company, and ten were not clear about their plans. While we did not ask participants about their ethnicity or social class, some participants mentioned these voluntarily. Nineteen participants self-identified with reference to skin color: 16 described themselves as *branco* (white) or as having *pele clara* (light skin), and three as *moreno* (brown) or *negro* (black). All of the participants who occupied professional or managerial positions and who referred to their ethnicity/race during the interview, self-identified as white. Participants also mentioned having dual nationalities, such as Brazilian–Italian, Brazilian–German, and Brazilian–Portuguese, usually due to family ancestry. Despite these differences, what stood out in the participants' narratives was a unifying national identity (Billig, 1995). We refer to it as '*Brasilidade*' ('Brazilianness') – which participants linked to their 'ex-colonial' status in Portugal. Table 1 presents the participants' details.

Interviews were conducted in 'Brazilian Portuguese' to avoid potential misunderstandings and perceptions of power imbalance (Piekkari & Tietze, 2016) by three of the authors. We asked the participants about their workplace experiences with colleagues, superiors and, if any, subordinates, and clients. We asked them to elaborate on these experiences and how they responded to them. Most participants related their experiences to their belief that they were viewed in Portugal as coming from an ex-colony and to being perceived

[1] Information from ORBIS, Confederação Nacional da Indústria and companies' websites showing Brazilian companies with majority shares operating in Portugal.

Table 1 Participants' details

Name[a]	Age range	M/F	Job in Portugal	Education	Number of years in Portugal
Vanessa	35–39	F	Journalist	Higher education	6 years
Eduardo[r]*	55+	M	Manager	Higher education	1 year
Bruno[r]*	35–39	M	Director	Higher education	3 years
Marcelo	30–34	M	Manager	Higher education	1 month
Adriana	55+	F	Cleaner	Secondary school	15 years
Edson[r]	40–44	M	Waiter	Secondary school	8 months
Rafael	30–34	M	Waiter	Higher education	4 months
Graziela[r]	55+	F	Call center	Higher education	3 years
Gabriel	25–29	M	Photographer	Secondary school	1 year
Augusto	40–44	M	Taxi driver	Higher education	6 years
Lucas	35–39	M	Mechanic	Secondary school	3 years
Sandra	30–34	F	Cleaner	Secondary school	1 year
Pedro[r]*	40–44	M	Director	Higher education	4 years
Júlia	25–29	F	Entrepreneur	Higher education	2 years
Ana	35–39	F	Pharmacist	Higher education	2 years
Francisco*	55+	M	Manager	Higher education	14 years
Antônio	40–44	M	Entrepreneur	Higher education	2 years
Felipe*	35–39	M	Manager	Higher education	7 months
João	35–39	M	Entrepreneur	Higher education	4 years
Laura	30–34	F	Manager	Higher education	4 years
Amanda	35–39	F	Cleaner	Higher education	5 months
José*	35–39	M	Manager	Higher education	2 years
Sérgio	35–39	M	Nurse technician	Secondary school	2 years
Leonardo	25–29	M	Driver	Secondary school	1 year
Aline*	35–39	F	Manager	Higher education	12 years
Bernardo*	40–44	M	Manager	Higher education	12 years
Mariana	35–39	F	Real estate agent	Higher education	2 years
Beatriz[r]	40–44	F	Medical doctor	Higher education	1 year
Daniel	25–29	M	Cook	Higher education	8 months
Márcia	35–39	F	Beautician	Secondary school	15 years
Patrícia*	35–39	F	Director	Higher education	2 years
Camila*	30–34	F	Manager	Higher education	2 years
Diego*	40–44	M	Supervisor	Higher education	2 years
Fernando[r]*	35–39	M	Manager	Higher education	3 years
Leandro*	40–44	M	Manager	Higher education	12 years
Tiago*	25–29	M	Manager	Higher education	1 year
Miguel*	55+	M	CEO	Higher education	4 years
Gustavo*	45–49	M	Director	Higher education	5 years
Vitor	50–54	M	Director	Higher education	1 year
Anderson*[r]	40–44	M	Manager	Higher education	1 year
Dora*[r]	30–34	F	Manager	Higher education	4 years
Mateus*	50–54	M	Director	Higher education	8 years

*Assigned expatriate

[a]The names used here are pseudonymous and were based on the ranking of the most popular names in Brazil from the Brazilian Institute of Geography and Statistics (IBGE https://censo2010.ibge.gov.br/nomes/#/search)

[r]Repatriated – currently living in Brazil

as inferior and unwelcome. We also invited participants to reflect on the positive and negative aspects of their experience. All participants – even those who had returned to Brazil several years before the interview – retained sharp memories of their experiences, especially negative ones. Such strong recollection of past events reinforces the message that significant past events can be special and retained clearly in individuals' memories (Mahr & Csibra, 2020).

Data analysis

Interviews were recorded and transcribed in their original format. To capture the complex and nuanced collective meaning of expatriate experiences in Portugal, we adopted an interpretivist analysis of participants' narratives (Vaara et al., 2016) based on a composite narratives approach (Johnston, 2024). A narrative approach was particularly well suited to our exploration of the salience of history in Brazilian expatriates' accounts, since "narratives are useful in research precisely because storytellers interpret the past rather than reproduce it as it was" (Riessman, 2005: 6). The use of composite narratives allowed us to capture the situated complexities of individual views and circumstances, while also enabling us to develop a more general understanding (Willis, 2019) of how history matters for expatriate adjustment.

Working in a multilingual team was challenging, in that not all members of the research team were able to participate equally in reading and coding the transcripts. To address this, we shared the findings and insights within the team in numerous meetings. Making sense of the material to the 'outsiders' (Meriläinen et al., 2008) – the team members who do not easily read (Brazilian) Portuguese – triggered thought-provoking and fruitful discussions about our interpretation of the findings. Data analysis took place in three stages, with the outcomes of each stage informing and inspiring the subsequent one(s) (see Fig. 1 for stages in the data analysis process).

Stage 1: Inductive mapping of the data

We first openly and inductively coded the material to identify notable events reported by participants, developing in vivo first-order concepts. Two authors coded the data independently and developed a coding scheme to help us locate how participants accounted for their experiences while in Portugal and their emotions and actions. We identified first-order codes (e.g., first impressions in Portugal, cultural differences, relationships at the workplace) and illustrated them with quotes. We observed that participants drew on references to colonial history to rationalize their actions and validate their feelings. We discussed our interpretation of the quotes and reached consensus. We proceeded to axial coding to establish the relationships of the experiences, the meanings given to those experiences, and their consequences while contextualizing them (Strauss & Corbin, 1998). Participants spoke, for example, about how much they learned about Portugal, they discussed how they learned to comport themselves in the Portuguese context, and they commonly provided accounts of prejudice and hostility, feelings of inferiority and marginalization, particularly at the workplace, and

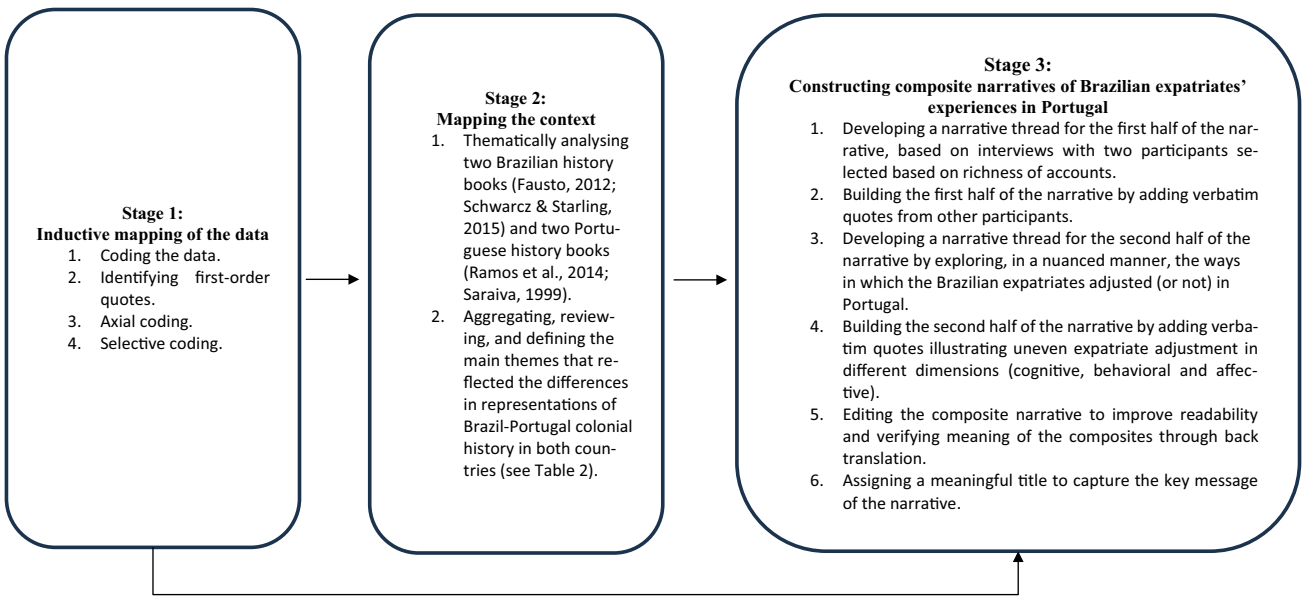

Fig. 1 Stages in data analysis

sentiments of pride and superiority. We observed cues in the categories that denoted participant's experiences that were related to national identity and attribution: Internally attributed (*us* Brazilians), and externally attributed (*them*, the Portuguese). As we proceeded to selective coding, we found a remarkably widely shared negative sentiment related to participants' feelings about their experience in Portugal that, ultimately, meant that their adjustment was only partial. This was a surprising finding, as it was not supported by the literature on expatriation. We therefore paid more attention to the participants' insistence on the importance of the colonial history than we had initially anticipated, and we explored its influence on expatriates' experiences and adjustment.

Stage 2: Mapping the context

To gain insights into the representations of history (Liu & Hilton, 2005) that our participants referred to during the interviews, we used secondary sources to conduct a thematic analysis (Braun & Clarke, 2006) of two Brazilian history books (Fausto, 2012; Schwarcz & Starling, 2015) and two Portuguese history books (Ramos et al., 2014; Saraiva, 1999). In doing so, we wanted to understand what versions of history – with reference to the same historical events – people are being taught in the two countries. We coded for semantic meaning (Braun & Clarke, 2006) and searched for codes that would be comparable: How the books describe the 'discovery' of Brazil and the colonization process, heroes and what they represent in both countries, how the books focus on historical events and their consequences, and how they describe the historical Portuguese dependence on Brazil and the Brazilian independence process. We defined and aggregated the main themes that reflected the differences in how colonial history is narrated in each country, as presented in Table 2.

The essential idea we captured from the thematic analysis (Braun & Clarke, 2006) was that while Brazilian books focus on domination and exploitation, portraying Brazilians at times as heroes of independence and at times as victims of colonization, Portuguese books present a sequential and systematic evaluation of colonial history through a narrative of discovery, conquest, and successful disengagement, in which the process of colonization was portrayed as benevolent.

Stage 3: Constructing composite narratives of Brazilians expatriates' experiences in Portugal

The composite narratives approach brings to light commonalities across the empirical material collected from the entire group of research participants, although it also leaves less room for nuances to be explored (Willis, 2019). In addition, it presents the researchers with the need to decide upon, and

Table 2 Representations of colonial history in Brazilian and Portuguese books

	Brazilian narrative	Portuguese narrative
Historical process	Victim	Conqueror, discoverer
Colonial relationship	Explored and dominated	Negotiated, enlightenment, educating indigenous people
National heroes during colonial times	Tiradentes (was executed as a traitor to plot independence) D. Pedro I (proclaimed independence) Marechal Floriano Peixoto (proclaimed republic)	Vasco da Gama, Pedro Álvares Cabral; Cristóvão Colombo (Navigators and conquerors); Marques de Pombal (politician and reformer)
History-centered	In a colonial narrative, and the relationship with the Portuguese, some foreign invasion and local rebellions for independence. The impact of colonization on Brazilian society	In local problems, such as foreign invasions, disputes with France, Spain and the UK, the start of navigations, and relations with eight colonies
Narrative focus	Social, centered on the development of the Brazilian society	Historical events are described sequentially and descriptively
Dependence	Portugal was economically dependent on Brazilian natural resources	Portugal was economically dependent on Brazilian natural resources
Brazilian history	Indigenous people were living in Brazil already; nothing was really 'discovered'; it was conquered and dominated	Brazilian history started when Pedro Álvares Cabral arrived in the country and discovered the country
Identity was seen as	Detached from Portugal in 1500, indigenous people were living in the country	The claim that Brazil was an 'extension' of Portugal until independence, so they share the identity
Outcomes of the colonial relations	An inferior and subjugated identity; concentration of wealth; the myth of racial democracy; Portuguese institutional heritage	Portuguese institutional heritage in Brazil and economic recession in Portugal after independence

Based on: Fausto (2012); Schwarcz and Starling (2015) (Brazil) and Ramos et al. (2014) and Saraiva (1999) (Portugal)

make clear, how to reconcile exceptions (Hymer & Smith, 2024). As mentioned above, in stage 1 of the analysis, using a grounded theory approach, we identified that there was clearly a shared sense of Brazilian national identity (related to both internal and external attributions), and a strong commonality with regard to the participants' interpretations of their negative experiences in Portugal through references to their national identity and the colonial past. Moreover, we found, in the empirical material, very few references to the positives of being a *Brazilian* expatriate in Portugal. The narratives were less 'choppy' and more reflective of participants' experiences and adjustment as composites than if we had analyzed them based on categorizations such as gender or race. We therefore decided to consciously break away from the established qualitative research practice of identifying negative cases that do not fit dominant patterns in order to build more robust theory (Strauss & Corbin, 1998). Adopting the composite narratives approach allowed us to "tell a more generally representative account of the experience" (Willis, 2019: 472) of Brazilian expatriates in Portugal, and to generate insights into how history matters for expatriate adjustment.

In constructing a composite narrative, we focused on the salience of references to the Brazilian nationality and colonial history in how participants narrated their experience and adjustment. We followed Johnston's (2024) six steps for constructing composite narratives:

1. In the first step, we returned to the transcripts and re-read them for refamiliarization. While reading the empirical material, we outlined the themes identified in the grounded theory analysis. We identified two participants with the richest and most detailed reflections (Johnston, 2024) on their experiences and adjustment in Portugal: one male manager expatriated by a Brazilian company and one female manager self-initiated expatriate (SIE). We used their reflections to develop the main thread for the narrative presented in this research. We composed the main thread of the storyline that gave voice to the participants and their experiences (Johnston, 2024). In composing the thread of the narrative, we focused on the reasons for the expatriation, the participants' first encounters with the Portuguese, important experiences they had in Portugal, their reflections on these experiences, and their feelings about them. We reflected on their narratives and identified that both participants simultaneously portrayed themselves as the proud, sovereign, heroic Brazilian ('*Brasilidade*', internally attributed) and the victim, marginalized, and mistreated Brazilian ('marginalized Brazilian', externally attributed). We selected verbatim quotes (Willis, 2019) that represented the sentiment of '*Brasilidade*' and the elements of inferiority and sense of marginalization and how they were linked to adjustment.
2. In the second step of constructing the composite narrative, we returned to the transcripts to complement and add richness to the narrative thread by adding verbatim quotes from other participants.
3. After composing the first half of the narrative, in the third step, we went back, again, to the transcripts of the interviews with the two participants who offered the richest and most detailed reflections. We did this in order to explore, in a more nuanced manner, and with attention paid to the three dimensions of adjustment (cognitive, behavioral, and affective), how the Brazilian expatriates adjusted (or not) in Portugal. We found that although, over time, the participants developed a good level of understanding of the Portuguese context and learned how to behave in certain circumstances, overall, they resented their time in the country, were disappointed with certain situations at the workplace, and in a range of circumstances, behaved in ways which signaled that their behavioral adjustment was not achieved. We looked more closely at the expatriates' functioning in Portugal, noting the details regarding how they developed knowledge about the local environment, became more aware of linguistic and cultural nuances, and learned how to act during workplace interactions. We also explored what the participants said about their feelings of discomfort and disappointment, for example about the lack of Portuguese friends and opportunities to participate in social activities with Portuguese colleagues. We noted that the way they interpreted their experiences shaped their behavior negatively, while also negatively influencing their emotional state and responses. Further, we noted that such a condition did not improve over time.
4. In the fourth step, we used quotes from participants to develop the second half of the narrative. We concluded that adjustment was a much more complex and nuanced phenomenon than described in the literature and that when different dimensions (cognitive, behavioral, and affective) of adjustment are considered, an 'uneven' picture of adjustment emerges, whereby adjustment in one dimension (e.g., cognitive) can be much better – and continue to improve over time – than adjustment in another dimension (e.g., behavioral or affective).
5. In the fifth step, we edited the composite narrative. Although we used original quotes from the participants, we added (in brackets) words when necessary to complete their sentences or to improve the narrative flow. We selected the composites we would use in the paper to illustrate our argument and translated them from Portuguese to English through back translation by two of the authors; any inconsistencies were discussed

and resolved between them. One of us, who is an L1 English and L2 Portuguese speaker, edited the content for readability.

6. As we reached step six, we attributed a meaningful title to the narrative that captured its key message: *Representations of colonial history in Brazilian expatriates' narratives: Limits to adjustment.*

Representations of colonial history in Brazilian expatriates' narratives: Limits to adjustment

The empirical material suggests that, overall, the Brazilian expatriates' adjustment in Portugal was only partial. Over time, the participants learned to function in Portugal. Their understanding of the local environment and knowledge increased, for instance, in relation to the language differences between the variety of Portuguese they spoke and that spoken by their Portuguese colleagues. The following quote from José, a manager, who at the time of the interview had spent 2 years in Portugal, illustrates the development of his *cognitive* adjustment, and in particular his communicative competence:

> *Today I already understand a lot of words, a lot of slang that they say here; but at first, I didn't understand some of the things they said... and they speak a little fast and sometimes I didn't understand much, and I asked them to repeat [what they said].*

The participants also provided examples of the incremental development of their *behavioral* adjustment and a better 'fit' with their workplace in terms of learning how to act:

> *Everyone says: "ah, the Portuguese are rude". The Portuguese aren't rude, okay? The Portuguese are objective. I love it, I mean, I love it and I hate it, but like, I often love it. And I end up being the same, we take on these things* (Júlia, entrepreneur, 2 years in Portugal).

The ability to function and know how to behave, however, does not translate into full adjustment, as it was not necessarily accompanied by a sense of satisfaction and belonging, as illustrated by Leandro, a manager, 12 years in Portugal: *I understand it, I know how to react, I don't like it, but I got used to it*. It was common for the participants to admit that although they understood how to function and behave, they still found it difficult to comply with the expected behavior all the time. In addition, they mentioned their unmet expectations regarding developing positive working relationships with colleagues. Participants felt that locals did not make any effort to support them, and they did not feel they had successfully adjusted, regardless of how long they lived and worked in Portugal:

> *You are Brazilian, you are not welcome, and this works against the expatriation of Brazilians in Portugal* (Anderson, manager, 1 year). *I will never be able to adjust completely… […over the years] I learned they will not change because of me* (Francisco, manager, 14 years). *I didn't like my time in Portugal, I adjusted in Mexico, but I didn't in Portugal, despite the similarities* (Eduardo, manager, 1 year).

Such an inability to bond and integrate locally demonstrates that the expatriates' adjustment was only partial. In particular, the empirical material provides insights into a failure to achieve *affective* adjustment, as manifested through examples of lasting negative emotional states and responses that, over time, did not turn into a state of emotional comfort. For example, Bernardo, a manager (12 years in Portugal), said that he would approach workplace situations by *always [being] suspicious that something [bad] will happen*, and Márcia, a beautician (15 years), said: *I felt everyone wanted to attack me*. Reporting extreme distress, Rafael, a waiter (4 months), confessed: *I will never forget all the barbarities I heard. There were many tears on my pillow. I [must] stand, or I kill myself*. Others spoke of feelings of *emptiness* (Graziela, call center worker, 3 years), *humiliation and invisibility* (Sandra, cleaner, 1 year), *loneliness* (Edson, waiter, 8 months), and *lacking identity* (Márcia, beautician, 15 years). It was also clear that although participants' knowledge about the local environment developed over time, the problems they faced in adjusting *affectively*, also had durable and all-encompassing effects on the *behavioral* adjustment of participants, exemplified by references to becoming different and behaving like *another person, less sociable* (Beatriz, medical doctor, 1 year), *introspective* (Francisco, manager, 14 years), *hardened* (Sandra, cleaner, 1 year), *reserved* (Leandro, manager, 12 years), and *silent* (Diego, supervisor, 2 years).

Below, we present two composite narratives that help explain why the expatriates' adjustment was only partial: the '*Brasilidade*' and 'marginalized Brazilian' narratives. Both reveal a sense of resentment rooted in the historically developed and contemporarily cultivated representations of the Brazil–Portugal colonial past which permeates the experience of Brazilians in Portugal. For analytical purposes, we present these two co-existing and interweaving narratives separately.

The '*Brasilidade*' narrative

The '*Brasilidade*' narrative is infused with a sense of national sovereignty and pride, Brazilians' entitlement to live and work in Portugal, and reminders of having

survived the colonial domination and exploitation. This narrative intrinsically attributes to the Portuguese representations as 'villains' and 'enemies'. Many participants admitted that prior to expatriation, they knew little about Portugal and that they attached little importance to knowing about the country before relocating there. Their knowledge, particularly regarding the relations between the two countries, was primarily based on the representations of colonial history learned in Brazil. The realization that the Portuguese tend to view the same historical period differently than Brazilians came as a surprise to them:

> *We learned at school that Brazil existed before Portugal: Portuguese people did not 'discover' Brazil* (Leonardo, driver, 1 year). *They destroyed the language, the culture, and the customs to dominate us* (Mariana, real estate agent, 2 years). *But they don't learn history as we do* (Augusto, taxi driver, 6 years). *The version of history they tell people [in Portugal] is not the same one we studied in school* (Eduardo, manager, 1 year). *They only know a romantic part of it* (Francisco, manager, 14 years).

The '*Brasilidade*' narrative conveys a view of Brazilian national identity as unique, hybrid, and separate from the Portuguese, which also reflects the representations of Brazilian identity found in the Brazilian history books we analyzed (Fausto, 2012; Schwarcz & Starling, 2015). In addition, it conveys the participants' sense of defiance and distancing from the Portuguese, along with the belief that the Portuguese, to this day, fail to recognize Brazil's independence:

> *We had the Portuguese colonizer* (Eduardo, manager, 1 year)*, but then we were abandoned along the way* (Diego, supervisor, 2 years)*, and Dutch, French and Spanish arrived in the 1800s, followed by Germans, Italians, Polish, and Japanese. Brazil is miscellaneous. Most Brazilians do not descend from the Portuguese* (Eduardo, manager, 1 year)*, but for the Portuguese, it was frozen in time* (Francisco, manager, 14 years). *They still see Brazil as a colony* (Felipe, manager, 7 months)*, but we do not recognize ourselves as a colony* (Anderson, manager, 1 year). *We have nothing to do with the Portuguese* (Francisco, manager, 14 years).

Participants also referred to colonial history when commenting on both countries' importance within the current world's economy, highlighting that while Brazil's economic significance has increased over time, Portugal's has reduced. In doing so, they commonly expressed the belief that the Portuguese resent the Brazilians because of Brazil's stronger economic position:

> *Because deep down, I think they are repressed, they resent they lost many things to us* (Sandra, cleaner, 1 year). *They have been overtaken by the Brazilians* (Graziela, call center worker, 3 years). *They resent it because the son is now richer than the father* (Beatriz, medical doctor, 1 year), *Brazil is much more important than Portugal* (Ana, pharmacist, 2 years). *Portugal is now a tiny country; they are Brazil's backyard* (Aline, manager, 12 years).

The '*Brasilidade*' narrative also frames the present-day Portuguese in negative terms, as represented by the use of terms such as 'repressed' and 'resentful'. The 'us-Brazilians' and 'them-Portuguese' divide serves as a strong collective identity, binding together Brazilians in Portugal whilst also further separating them from the Portuguese. This divide is a common motif in the '*Brasilidade*' narrative, which is clearly delineated in opposition to – and with a sense of superiority towards – the Portuguese:

> *The Brazilians are what Portugal has best. The sense of* 'Brasilidade' *emerges strongly when we are here; there is a sense of brotherhood, and you become more sensitive to other Brazilians* (Rafael, waiter, 4 months). *We don't lose our roots, our values* (Patrícia, director, 2 years). *We need to have an identity. I fought for my identity; I am Brazilian* (Márcia, beautician, 15 years).

Importantly, understanding that Brazilian expatriates draw on representations of Brazil–Portugal colonial history in narrating their experiences in Portugal, highlighting their '*Brasilidade*', helps explain their responses to negative experiences, and, ultimately, their difficulties in accomplishing *affective* and *behavioral* adjustment. By claiming a national Brazilian identity to protect themselves from the prejudice they perceive and experience in Portugal, they detach themselves from any positive affection and rationalize their negative feelings towards the Portuguese as embedded in colonial history – which becomes a barrier to their achievement of *affective* adjustment. In addition, the Brazilian identity helps them rationalize their distancing and defiant behavior, which, in turn, suggests that their *behavioral* adjustment has now been accomplished: [*I behave in that way because*] *I am a Brazilian*, as observed by Aline, a manager, 12 years in Portugal.

In addition, in situations where participants felt they were facing prejudice or hostility, or when the legitimacy of their presence in Portugal was questioned at the workplace, it was common for the participants to interpret such experiences as being nationality-based, and to respond as if they were 'righting historical wrongs':

> *I heard [the clients say] Brazilians should go back to their country. I replied, 'yes, I will; first just let me take some of the money you stole back* (Augusto,

taxi driver, 6 years). *We are not here to steal anything from them; they were the ones who stole from us in the past* (Sandra, cleaner, 1 year). *The indigenous people did not grant permission to the Portuguese […to invade Brazil and take its natural resources]* (Vanessa, journalist, 6 years). *I defended myself and told them: you know the history, right? When Cabral*[2] *got to Brazil, he stole everything from the indigenous people, right?* (Edson, waiter, 8 months).

In providing Brazilians with a collective bond in an environment they consider hostile, the '*Brasilidade*' narrative also conveys a sense of the participants' entitlement to live and work in present-day Portugal. This sense of entitlement is justified through references to Brazil as an ex-colony that was historically invaded, exploited, and robbed by the Portuguese. Here, the portrayal of Portugal as the historical 'villain' serves to counter the contemporary anti-immigration discourse that confronts Brazilian expatriates in Portugal and helps them make sense of and rationalize their negative experiences and partial adjustment.

The 'marginalized Brazilian' narrative

The 'marginalized Brazilian' narrative addresses the participants' perception that the Portuguese view the Brazilians as inferior, subordinate, and unappreciative of their civilizational 'rescue' by the Portuguese. This narrative also draws on representations of colonial history that the participants learned in Brazil, consistent with the representations found in the Brazilian books we analyzed (Fausto, 2012; Schwarcz & Starling, 2015). It is underpinned by a conviction that the Brazilians, because they come from an ex-colony, are considered by the Portuguese to be 'third-world' citizens – inferior and less well educated than the Portuguese. Even those participants who worked in high-status jobs expressed belief and resentment that their Portuguese colleagues perceived them as inferior. Participants spoke of instances where their managerial leadership and decision-making competence were questioned, and where opinions about their presence not being needed were openly expressed. The 'marginalized Brazilian' narrative gives insights into the participants' partial adjustment, especially indicating that they have not achieved *affective* adjustment. In narrating such experiences, they drew on references to colonial history:

I suffered prejudice from clients because I am Brazilian. They think they are heroes; they believe Brazil was drifting there, and [the Portuguese] saved us. They think that we are theirs and they can boss us around (Augusto, taxi driver, 6 years). *They feel victorious about us* (Graziela, call center worker, 3 years), *that arrogance, they feel it [towards us]* (Bruno, director, 3 years). *They have that feeling of being superior to the Brazilians* (Francisco, manager, 14 years), *because they 'discovered' Brazil, right?* (Camila, manager, 2 years). *They treat us as inferior, they look at you with a certain air of superiority* (Lucas, mechanic, 3 years).

In the 'marginalized Brazilian' narrative, there is a conflation of past injustices that Brazilians experienced during the colonial time and the workplace challenges and disadvantages faced by Brazilian expatriates in contemporary Portugal. The narrative offers insights into the expatriates' sense of feeling at society's and organization's margins, unwelcome or unsupported by colleagues because of their nationality:

Prejudice is rooted in our past (Aline, manager, 12 years). *[… for the Portuguese] you are a Brazilian, and all Brazilians are the same* (Augusto, taxi driver, 6 years). *Once you have a Brazilian accent, you are a Brazilian; all the rest is irrelevant* (Vanessa, journalist, 6 years). *They make fun with the way I speak* (Ana, pharmacist, 2 years), *they roll their eyes, they get annoyed, they snort* (Marcelo, manager, 1 month). *They even changed the place they eat, so I couldn't join them* (Laura, manager, 4 years).

The shared language, rather than facilitating the experience and positively contributing to adjustment through enabling effective communication, becomes a source of hurt and disappointment. It works as a barrier, preventing expatriates from forming local networks, obtaining local support and building positive workplace relations – all aspects that contribute to expatriate adjustment. It also negatively affects the development of a sense of belonging, impeding expatriates' ability to express themselves freely. Participants provided various examples of being marginalized in the workplace, for instance, by clients:

'Brazilian? I don't want to speak with a Brazilian' (Graziela, call center worker, 3 years). *Another customer told me: 'you are Brazilian, go back to your country'* (Gabriel, photographer, 1 year). *Some clients didn't allow me to gather their feedback from a customer survey simply because I am Brazilian* (Laura, manager, 4 years).

Some participants working in lower-level positions spoke of being yelled at and being called 'dumb', 'good-for-nothing', and '*zuca*'. *Zuca* derives from *Brazuca*, a crude, demeaning slang term. The experiences of marginalization

[2] Pedro Álvares Cabral 'discovered' Brazil in 1500 (Schwarcz & Starling, 2015).

also included having one's presence ignored when greeting clients at shops, not being given the same number of breaks at work as locals, being expected to work long hours, and being excluded from social activities with Portuguese colleagues. In the 'marginalized Brazilian' narrative, the experience of mistreatment at work, underpinned by the belief that the Portuguese did not want to work or even interact with the Brazilians, was emphasized:

> *When they see you are Brazilian, they turn away, it is very strong* (Sérgio, nurse technician, 2 years). *[… Because I am Brazilian], my boss didn't allow me to have a break, I had to work 14 hours non-stop* (Daniel, cook, 8 months). *My peers isolated me, they never included me, so it was very difficult* (Márcia, beautician, 15 years).

Participants working in managerial positions also spoke of a range of experiences of workplace marginalization, which they saw as influenced by their Portuguese colleagues' perceptions of Brazilians as inferior to them. At times, reportedly, they were on the receiving end of explicit references to a representation of Brazil–Portugal colonial history that was consistent with that found in the Portuguese history books we analyzed (Ramos et al., 2014; Saraiva, 1999) – of the Portuguese as a superior 'conqueror'. They spoke of not having their presence as managers accepted and not receiving local support – in one case, despite over 14 years working as an expatriate for a Brazilian company – nor the guidelines coming from Brazilian headquarters being accepted by locals:

> *I have difficulties working with the Portuguese* (Camila, manager, 2 years). *It was the place I suffered the most resistance [compared to other subsidiaries]… They criticize you but don't help you* (Bruno, director, 3 years). *There are people who don't like receiving orders from Brazilians, they think that Brazil is a third-world country* (Mateus, director, 8 years). *Sometimes my colleagues would say to me, 'do not forget you are from the colony, and we are the colonizers'* (Francisco, manager, 14 years). *It is colonial* (Laura, manager, 4 years). *They look at us and think, 'How can someone coming from an ex-colony come here and tell me how I have to do things, tell me what I should do, and how I should do it?'... It is a clear colonizer and colony issue* (Eduardo, manager, 1 year).

The 'marginalized Brazilian' narrative also encompasses other elements of colonialism, such as enslavement. Bruno, a director, 3 years in Portugal, recalled that one day, after rounds of a dispute with the headquarters in Brazil, he overheard his Portuguese superior saying to local peers, '*this situation is unacceptable; it seems that we are the enslaved*'. By contrast, Rafael, a waiter, 4 months, narrated his sense of feeling misrecognized and unappreciated at work by drawing on the idea of enslavement and comparing the behavior of his boss in Portugal and the mistreatment suffered by enslaved people in Brazil during the colonial period:

> *The enslaver here has only changed the name; it is called a job, [once] my manager called me out because I was drinking water. I understood, an employee in a uniform within the enslaved quarter cannot drink water as if he was a guest.*

Finally, the 'marginalized Brazilian' narrative also had an element of victimization, with some participants admitting to responding to experiences in Portugal from the position of a victim and others expressing the need to overcome this type of response:

> *I felt like a victim...* (Márcia, beautician, 15 years). *We need to find ways to dissociate ourselves from the victim mentality… Brazilians cannot see themselves as victims* (Patrícia, director, 2 years).

Altogether, the 'marginalized Brazilian' narrative offers insights into the unaccomplished *affective* and, in many cases, also *behavioral* adjustment of the participants.

Discussion

At the outset of the paper, we asked: *How does colonial history matter for expatriate adjustment?* We addressed the experiences of Brazilian expatriates in Portugal. We found that, despite the cultural and institutional similarities between the home and host countries rooted in Portugal's colonization of Brazil, expatriates' adjustment was only partially achieved. Below, we briefly summarize the key empirical insights emerging from our analysis, before discussing the two theoretical contributions which our research makes to the literature on expatriate adjustment.

Summary of empirical insights

We presented two composite narratives: the '*Brasilidade*' narrative and the 'marginalized Brazilian' narrative, to capture how Brazilians make sense of, rationalize, and respond to their workplace experiences in Portugal. These two intertwined narratives are consistent with the representations of Brazil–Portugal history in books produced in Brazil (Fausto, 2012; Schwarcz & Starling, 2015). In these representations, Portugal is portrayed as the 'enemy' and the 'exploitative invader' of Brazil. The '*Brasilidade*' and the 'marginalized Brazilian' narratives co-existed across the interviews and their elements were often interwoven within one interview. They help to explain the partial expatriate adjustment which the participants

shared with us: Even after living and working in Portugal for many years, many expatriates had not built positive relationships with colleagues, developed support networks with locals, or enjoyed their time in Portugal. While the empirical material suggests that over time, the participants were developing knowledge of the local environment and achieving cognitive adjustment, it also shows that none of them could be considered to have achieved affective adjustment. In addition, for many, the accomplishment of behavioral adjustment was also problematic, as their negative feelings influenced the ways they behaved in interactions and responded to experiences. The participants' sense of national identity, based on a divide between 'us-Brazilians' versus 'them-the Portuguese', emphasized in daily interactions and consistent with what Billig (1995) refers to as 'banal nationalism', was key to how they narrated their experiences of working in Portugal.

By generating knowledge from the under-explored context of Brazilian expatriates in Portugal, our study makes an empirical contribution to IB research. The empirical findings show that, in response to what they interpreted as marginalization rooted in historically sedimented hostility, the Brazilians in our study would reinforce their national identity by creating a sense of bonding (Vaara et al., 2021) with other Brazilians as people belonging to the same 'imagined community' (Anderson, 2006) to rationalize their lack of adjustment, particularly affective and behavioral adjustment. This is an important insight, as the literature on expatriate adjustment has paid insufficient attention to the importance of national identity.

Our study also makes two original theoretical contributions to the literature on expatriate adjustment: (1) We explain how historical colonial relations between specific country dyads, i.e., expatriate's country of origin and the host country, matter for adjustment; and (2) We develop a nuanced understanding of adjustment by drawing attention to its distinct, albeit mutually interdependent, dimensions (cognitive, behavioral, and affective), and highlighting that in contexts of expatriation from an ex-colony to an ex-colonizer, affective, and behavioral adjustment might not be achieved over time.

How colonial history matters for adjustment

Our analysis helps us explain how colonial history between the expatriate's country of origin and the host country matters for expatriate adjustment. We contribute to the literature on expatriate adjustment, which, to date, has primarily focused on the agency of the individual (see e.g., van Bakel, 2019) and, to a lesser extent, on the role of the organization (e.g., Armon et al., 2023). Extant research has incrementally built a helpful understanding of a range of these factors contributing to adjustment. However, it has paid less attention to the importance of the context in which expatriation takes place, generally proceeding on the understanding that contextual similarities between the home and host country – such as shared language and similar institutions and culture – positively influence adjustment (Dimitrova et al., 2023; Fitzsimmons et al., 2020; Varma et al., 2023). Our study, employing a qualitative methodology, has allowed us to engage in more innovative theorizing (Szkudlarek et al., 2021).

Our analysis shows how colonial history matters for expatriate adjustment through representations of colonial history internalized by individuals in the country of origin. These representations of history influence how expatriates interpret and respond to experiences in the host country. Inspired by the literature addressing the importance of social representations of history for people's responses to events in the present (Hong et al., 2001; Liu & Hilton, 2005), we argue that expatriates 'carry' within themselves representations of history which they learned in their country of origin through the education system and mass media (Hamilton et al., 2002), and which present a particular version of history, serving the objectives and interests of the nation that has developed them (Evans, 2003; Halbwachs, 1950). Expatriates from former colonies would have learned in their home country a history of domination, oppression, and exploitation by invaders from the colonizer, i.e., their current host country. These representations of history influence – with a focus of negativity towards, and a desire to distance themselves from, the locals – how individuals narrate and interpret their experiences as expatriates. The interpretations of experiences, in turn, negatively influence expatriates' workplace behavior and their relationships with the local colleagues. For example, expatriates might contribute to becoming alienated from the host country's environment by approaching all interactions with locals with suspicion, with an expectation of being attacked, or with a conviction that the locals perceive them as inferior. At the same time, expatriates from an ex-colony are likely to find themselves on the receiving end of marginalization by locals, who carry within themselves (different) representations of history reproduced by the education system and the media in their country. The mutual prejudice rooted in colonial history presents a hindrance to expatriates' ability to build networks of local support, develop good working relationships with colleagues from the host country, achieve work satisfaction and, altogether, develop a sense of well-being at work and flourish in their daily lives. As such, the expatriates' adjustment remains only ever partial.

The specific context is crucial here since the narratives through which expatriates make sense of and rationalize their experiences are underpinned by country-specific social representations of the historical colonial relations between home-host country dyads. Our analysis suggests

that, rather than assuming that shared language, cultural similarities, and historical ties work as facilitators of adjustment (Dimitrova et al., 2023; Varma et al., 2023), we should start from the assumption that the outcomes of the workings of these factors will always be context-specific. Further, we should also assume that, in cases of colonial history between countries, these factors – since they have their origin in historically traumatic (Mohatt et al., 2014) events – might have a negative influence on the development of a good person–environment fit.

Developing a nuanced understanding of expatriate adjustment

Our study also allows us to contribute to a more nuanced conceptualization of expatriate adjustment. Previous research has followed Black et al.'s (1991) conceptualization of adjustment, which does not leave space for examination of how adjustment takes place in different dimensions (Kim, 1979, 2001): cognitive (learning and new knowledge allowing the expatriate to understand the meaning of situations and communication in the host country), behavioral (developing new behaviors that are helpful in operating in the host country), and affective (development of a sense of well-being in the host country). By contrast, our research, in line with Hippler et al. (Hippler, Brewster, et al., 2017) definition of adjustment, suggests that expatriate adjustment involves complex change processes, which can be understood along these three dimensions of adjustment. Following from our study, we propose a more nuanced conceptualization, capturing these three dimensions of adjustment. Such conceptualization of adjustment also helps us understand that an individual might be well adjusted in one dimension but not in another, or that their adjustment in one dimension (e.g., cognitive) might develop over time, but not in another dimension (e.g., affective), so that, altogether, their adjustment might never be more than partial.

Further, as the example of Brazilians in Portugal suggests, a person's poor affective and behavioral adjustment might develop into a long-term state of 'dysfunctional' adjustment, characterized by emotional ill-being, feelings of sadness, disappointment, and anger, coupled with defiant reactions towards or/and withdrawal from interactions with local colleagues, a reinforcement of national identity and a reliance on bonds with other expatriates from the individual's home country. These are important insights because previous research has proceeded on the assumption that adjustment, even if it is not a linear process, improves over time (e.g., Takeuchi et al., 2008). We propose that in certain contexts, such as those underpinned by a colonial history between the expatriate's home country and the host country, full adjustment is unlikely to be achieved, even after a long period of expatriation. For instance, people might appear well adjusted because they have gained the necessary knowledge (cognitive adjustment) and learned a range of crucial behaviors (behavioral adjustment) that are helpful for their functioning in the host country, but at the same time, they will not have developed in the host country a sense of well-being and satisfaction from work and in life (affective adjustment). Alternatively, they have adopted behaviors aimed at reducing emotional ill-being (and therefore at improving affective adjustment), but these behaviors (such as lack of interactions with local colleagues and limiting social networks) might actually be a sign of a dysfunctional, rather than accomplished, behavioral adjustment.

Limitations

We acknowledge the limitations of this study. First, we recognize the limitations of the empirical material we were working with. The material was generated through interviews with individuals with different length of time spent in the host country. Moreover, as some of the participants were interviewed several years after they returned to Brazil, their accounts referred to the memories – and human memory has its own limitations – of past experiences. Second, since contexts change, different participants' experiences took place not only at a different time but also in a different context. Third, we did not interview the Portuguese colleagues, managers, and subordinates of Brazilian expatriates, and therefore we did not find out about their experiences of working with Brazilians, and the role that representations of colonial history play in their interpretations and responses to these experiences. Fourth, as is the case with interpretive research, we recognize that there were possibly other interpretations that could have emerged from the data. Fifth, through adopting the analytical approach of constructing a composite narrative, which involved 'merging' the voices of expatriates from different social groups and occupations, we were not able to fully bring out the differences between the experiences of expatriates characterized by different categories of social difference, such as ethnicity/race, gender, or socioeconomic class as well as those working in different types of occupations. Sixth, the findings of our study are not necessarily transferable to other country dyads, and even in the case of the same country dyads, the findings might be different in relation to waves of expatriation taking place in different times. We highlight that the lack of transferability is even more relevant in the case dyads with less homogeneity in relation to national identity and historical interpretations than we found among Brazilians in Portugal.

Conclusions

Our research shows how Brazilian expatriates draw on social representations of colonial history, learned and internalized in their country of origin, to make sense of and rationalize their experiences as well their responses to these experiences in Portugal. The influence of these internalized representations of colonial history is so strong that, despite cultural and institutional similarities between the home and host country, expatriate adjustment (understood as encompassing cognitive, behavioral, and affective dimensions) is only partially achieved.

We conclude by highlighting the key managerial implication of our study: organizations – especially those operating internationally and employing staff from different countries – ought to engage more, and more critically, with history. This would involve, in the first place, the acknowledgement that, on a daily basis and in specific ways, history plays out in organizations. This would require an awareness that the versions of history which we carry within ourselves might differ from the versions of history which others, especially those coming from different countries, carry. In addition, this would involve understanding that, typically, members of specific groups such as nations, share representations of history which portray their group in a favorable way. Further, such critical engagement with history would also involve the development of insights into how social representations of history influence the way employees and managers interpret what happens in the workplace, how they relate to each other – with an emphasis on how one relates to colleagues from different national backgrounds – and behave. Building on such awareness, we recommend that organizations should enable employees to both better understand multiple narratives of history, and to recognize their own implicit biases. This is of particular importance in those organizational contexts where employees come from countries which share colonial history. In emphasizing that history matters for organizations, we also point to the crucial role of national education systems in equipping citizens with a critical understanding of history, including colonial history, and its influence on interpretations of and responses to events in the present. Education systems also have a key task of developing in citizens the willingness and capability to reflect on and overcome their own presumptions and prejudices towards members of different groups.

In terms of future studies, we call for further qualitative IB research addressing the specific ways in which history matters in different geographical contexts, particularly with a stronger focus on language (see also Vaara et al., 2005) as well as other aspects of diversity, such as gender and ethnicity, in shaping experiences of expatriates in post-colonial conditions. We also recommend longitudinal studies to explore the complexities of expatriate adjustment and how it unfolds over time.

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