

CRANFIELD UNIVERSITY



J PICKARD

REPATRIATION: FACTORS RELATED TO
INDIVIDUALS' EXPECTATIONS OF
INTERNATIONAL ASSIGNMENTS

SCHOOL OF MANAGEMENT

PhD THESIS

1999

CRANFIELD UNIVERSITY



SCHOOL OF MANAGEMENT

PhD Thesis

Academic Year 1999-2000

JUANA PICKARD

**Repatriation: Factors related to individuals'
expectations of international assignments**

Supervisor: C. Brewster

October 1999

**This thesis is submitted in partial fulfilment of the requirements for
the degree of Doctor of Philosophy.**

ALL
MISSING
PAGES ARE
BLANK

Abstract

This thesis is concerned with understanding the expectations that corporate employees form about the work- and career-related outcomes of an international assignment.

Such expectations are frequently cited as being "unreasonable" and a major source of problems in the repatriation and reintegration of international returnees. There is, however, a lack of research evidence to indicate when these expectations form, how they change with time, or what factors influence their formation.

The research takes a UK perspective in view of the comparatively low levels of research into British international assignees in general and their motivations and expectations in particular.

The author believes this to be the first study devoted exclusively to the expectations of international assignees.

The main stage of this research comprised of a postal survey to collect information about international assignees, about their work-related and career-related expectations, and about a number of factors which might prove to be precursors or predictors of expectations. Data were captured from a comparatively homogeneous population comprising British employees of profit-making companies.

The main contribution of this thesis is an increase in our understanding of the work-related and career-related expectations that corporate employees form when assigned overseas. In particular, the thesis increases our knowledge of when these expectations form; how they vary with time; and what personal characteristics, actions taken by the employing organisation, and characteristics of the assignment itself affect those expectations during the course of an international assignment.

A secondary contribution of this thesis is to identify a number of classes or categories of assignment that appear to be intrinsically associated with different types and degrees of expectation.

Acknowledgements

The decision to undertake this PhD was not taken lightly, as I had others to consider apart from myself: once taken, however, I prepared myself for a hard but straightforward road ahead. Hard, it certainly proved to be. Straightforward does not do justice, however, to a period that has been dogged by illness and bereavement (not to mention the more pleasant interlude of a daughter's wedding).

Many people stuck with me through thick and thin during this period, lending me the support and encouragement that I needed to continue, determined to reach the goal.

Without their help I would never have been able to reach this point, and I would like to thank them here.

First I must thank my supervisor, Chris Brewster who, through continued constructive criticism and encouragement, helped me to stay focused on my study despite difficult circumstances.

I must also thank the Centre of International Briefing for their collaboration and assistance towards my research: particular thanks are due to the late Richard Hobbs.

To the many researchers, PhD students and lecturers both inside and outside Cranfield School of Management whose support, ideas and discussions over time have been a constant source of inspiration and aspiration: particular thanks are due to Colin Fletcher, Chris Myers, Noeleen Doherty, Bronween Rees, Lynn Thurloway, Hilary Harris, Arianne Hegewisch, Lesley Mayne, and Olga Tregaskis.

For both their friendship and for the clear professionalism with which they proffered their assistance in administration and information retrieval I must thank Kim Fitzgerald, Sarah Atterbury, Val Singh, Wayne Bulbrook, Barbara Birtles, and Anita Beal.

Special thanks are due to my husband David, whose multiple support role as information technology consultant, proof reader and short-order cook has been invaluable: it is no cliché to say that, without his support, none of this would have been possible.

To my daughters, Jacqueline and Jennifer, who kept me buoyed up by their own achievements during this period, sometimes just for being there, and sometimes for dragging me out of the house to remind me of the world outside.

Last, but most certainly not least, I must thank my considerable family for their continued moral support. Special thanks must go to my late grandfather, who taught me about life, and to my late sister who showed me the true meaning of courage.

Twickenham, 1999

CONTENTS

CONTENTS

ABSTRACT.....	3
ACKNOWLEDGEMENTS.....	5
CONTENTS.....	9
TABLES.....	17
FIGURES.....	22
CHAPTER ONE INTRODUCTION.....	27
1.1 Objectives of the Research.....	27
1.2 Research Rationale.....	27
1.2.1 Repatriation: A personal perspective.....	28
1.2.2 Repatriation: A business perspective.....	29
1.2.3 Repatriation: A theoretical need.....	30
1.3 Research Contribution.....	33
1.4 Research Questions.....	35
1.5 Definition of “International Assignee”.....	35
1.6 Outline of Thesis Chapters.....	41
2. LITERATURE REVIEW.....	45
2.1 Rationales for International Assignments.....	46
2.2 Individual Motives of International Assignees.....	51
Variation in Motivation.....	56
Educational Qualifications.....	57
2.3 Expatriate Failure.....	60
The high cost of failure.....	62
Causes of failure.....	63
The foreign environment and culture.....	64
International Adjustment.....	65

Age and the ability to adjust.....	69
Selection Criteria for International Assignees	69
Selection Methods for International Assignees	71
Training and Preparation for International Assignments	72
Comment	75
2.4 Repatriation.....	77
Problems for the Returning Assignee	77
Problems for the Organisation	79
Effects of unsuccessful repatriation.	81
Proposed Solutions to Repatriation Problems	82
Comment	90
2.5 Strategic International Human Resource Management	92
Internationalisation by smaller or newer organisations	94
Changes in host locations	95
Changes in the expatriates themselves	95
SIHRM and Expectations	102
Increased value of international experience.....	104
Comment	105
2.6 Limitations of the literature.	106
2.6.1 American Bias	106
2.6.2 Fragmentary Focus	106
2.6.3 Dearth of empirical data.....	107
CHAPTER THREE RESEARCH QUESTIONS	111
3.1 Preamble	111
3.2 Preliminary Research.....	111
3.2.1 Literature Summary.	111
3.2.2 The rationale for preliminary research.	111
3.2.3 Preliminary Research Design.....	113
3.2.4 Organisation selection	114
3.2.5 Recording and transcription	116
3.2.6 Responses	116
3.2.7 Conclusions	119
3.2.8 The expectations of returning international assignees.....	119
3.3. "Expectation": The literature revisited	120
3.4 Expectation: A theoretical concept.....	121
3.4.1 Expectation in Motivation Theory	122
3.4.1.1 Theories of Arousal	122
3.4.1.1.1 Maslow's Need Hierarchy.	123
3.4.1.1.2 Herzberg's Motivation-Hygiene Theory.....	124

3.4.1.2 Theories of Choice	124
3.4.1.2.1 Adams's Equity Theory	125
3.4.1.2.2 Vroom's Expectancy Theory	125
3.4.1.2.3 The Porter and Lawler expectancy model	127
3.4.1.3 Summary: Motivation Theory.....	130
3.5 Career: a theoretical concept	131
3.5.1 The Linear Career Model	131
3.5.2 Non-Linear Career Models.....	132
3.5.3 Career Boundary Crossings.....	135
3.6 Repatriation Expectation and Expectancy Theory.	138
3.7 Repatriation Expectation: A suitable subject for study	143
3.8 Research Questions.....	144
3.9 Propositions.....	145
3.9.1 Research Question1	145
Motivation to accept an international assignment.....	145
Expectations prior to return	146
Continuing, Long-Term Expectation	147
3.9.2 Research Question 2.	148
Formal or Informal Selection Methods.....	148
Pre-Departure Discussion and Planning	148
Training and Preparation.....	149
Continued links with the assignee during the assignment.....	149
3.9.3 Research Question 3	150
Age of the assignee.....	150
Gender	151
Marital Status.	151
Partner encouragement.....	152
Educational Qualifications.	152
Previous Expatriate Experience.	153
"Push" or "Pull" Motivation.....	153
The geographical destination	153
The duration of the assignment.....	154
Partner adjustment.....	154
Presence of a significant expatriate community.	154
Development and Learning	155
The nature of the job following return.....	155
CHAPTER FOUR METHODODOLOGY.....	161
4.1 Introduction.....	161
4.2 Research Philosophy	161

4.3 Research Methods.....	164
4.4 Assignee survey	171
4.4.1 Sources of International Assignees	171
4.4.1.1 The Centre for International Briefing	172
4.4.1.2 Cranfield MBA students.....	172
4.4.1.3 Interviewed Organisations	173
4.4.1.4 Summary: Sources of International Assignees.....	173
4.4.2 Questionnaire Design	173
4.4.3 Pilot.....	181
4.4.4 Questionnaire production.....	182
4.4.5 Questionnaire distribution	183
4.4.5.1 The CIB sample.....	183
4.4.5.2 The Cranfield MBA sample	184
4.4.5.3 The interviewed organisation sample	184
4.5 Data Analysis	185
4.5.1 The approach to data analysis.....	185
4.5.1.1 Introduction.....	185
4.5.1.2 Basic Definitions	185
4.5.1.3 Measures of Central Tendency	187
4.5.1.4 Measures of Dispersion.....	188
4.5.1.5 Hypothesis Testing.....	188
4.5.1.6 The Chi-Square Test of Independence	189
4.5.1.7 Correlation between Ordinal variables	191
4.5.1.8 Correlation between Interval variables	192
4.5.1.9 Linear Regression	193
4.5.1.10 Causation	193
4.5.1.11 Multiple Regression.....	193
4.5.1.12 Factor Analysis	194
4.5.1.13 Application of Procedures to Variables.....	195
4.5.1.14 Practical Considerations.....	195
4.5.2 The process of data analysis	198
4.5.2.1 Response and Response Rate	198
4.5.2.2 Data Analysis	198
4.5.3 Presentation of the Findings	199
 CHAPTER FIVE FINDINGS	 203
5.1 Questionnaire Responses	204
5.2 Case Rejection for Sample Homogeneity.....	231
5.3 Characteristics of Participants and their Assignments	233
5.4 Examination of the Propositions.....	238
5.4.1 Research Question 1	238

Proposition 1: Motive (Career)	238
Proposition 2: Motive (Challenge)	239
Proposition 3: Motive (Development)	239
Proposition 4: Motive (Money)	240
Proposition 5: Expectation (Career)	241
Proposition 6: Expectation (Challenge)	241
Proposition 7: Expectation (Development)	242
Proposition 8: Expectation (Money)	242
Proposition 9: Expectation (Long-Term)	243
5.4.2 Research Question 2.	244
Proposition 10: Formality of the selection process.	245
Proposition 11: Repatriation planning at the time of selection	247
Proposition 12: Pre-departure training and preparation	251
Proposition 13: Continued links between assignee and organisation	252
Proposition 14: Planning and preparation for the return	253
Proposition 15: Involvement of line manager in return planning	253
5.4.3 Research Question 3	255
Proposition 16: Age	257
Proposition 17: Gender	259
Proposition 18: Marital status	260
Proposition 19: Partner Encouragement	261
Proposition 20: Educational Qualifications	261
Proposition 21: Prior expatriate experience	262
Proposition 22: "Push" and "pull" motives	264
Proposition 23: Geographical destination	267
Proposition 24: Duration of the assignment	269
Proposition 25: Partner international adjustment	270
Proposition 26: Presence of an expatriate community	271
Proposition 27: Self-recognition of learning and development	272
Proposition 28: Characteristics of the job following return	273
Proposition 29: Utilisation of skill and experience acquired overseas	274
 5.5 Relationships between factors affecting expectation	 275
 CHAPTER SIX CONCLUSIONS	 299
6.1 Discussion and Conclusions	299
Motivation to accept the assignment	299
Expatriates: Active or Passive ?	300
Expectations at the time of return	301
Continuing long-term expectations	305
Different expectations for different assignees	306
 6.2 Contribution of the Research	 308
 6.3 Limitations of the Research	 310

6.4 Implications of the Research.....	311
Implications for Companies employing international assignees.....	311
Implications for employees	312
Implications for researchers	312
 REFERENCES.....	 317
 APPENDIX A	 335
 APPENDIX B: EXPATRIATE QUESTIONNAIRE.....	 339
 APPENDIX C: EXPATRIATE PARTNERS QUESTIONNAIRE ..	 367

TABLES

TABLES

Table 2.1: Expatriate Failure Rates based on Harzing (1995).....	61
Table 2.2: Evolving business paradigms (after Moran and Riesenberger 1994)	94
Table 2.3: Performance management changes (after Stiles et al 1997).....	98
Table 5.1 Gender (Question 1.2).....	204
Table 5.2 Nationality (Question 1.3).....	204
Table 5.3 Expatriate status (Question 1.5).....	204
Table 5.4 Age (Question 1.6a).....	205
Table 5.5 Marital Status (Question 1.6b).....	206
Table 5.6 Dependent children (Question 1.6c).....	206
Table 5.7 Educational Qualifications (Question 1.7).....	207
Table 5.8 Occupational Speciality (Question 2.1).....	207
Table 5.9 Employment Status at the time of selection (Question 2.2a/e).....	207
Table 5.10 Tenure with organisation (Question 2.2d).....	208
Table 5.11 How recruited (Question 2.3).....	208
Table 5.12 Anticipated deployment after return from assignment (Question 2.4).....	209
Table 5.13 Geographical region to which assigned (Question 2.5).....	209
Table 5.14 Pre-defined assignment duration (Question 2.6).....	209
Table 5.15 Planned duration of the assignment (Question 2.6).....	209
Table 5.16 Previous expatriate experience (Question 2.7).....	210
Table 5.17 Perceptions at the time of Selection (Question 2.8).....	210
Table 5.18 Motive for accepting the assignment (Open Question 2.9).....	211
Table 5.19 Subjects discussed at selection (Question 2.10).....	211
Table 5.20 Formality of the selection process (Question 2.11).....	212
Table 5.21 Final selection decision (Question 2.12).....	212
Table 5.22 Inclusion in selection discussions (Question 2.13).....	212
Table 5.23 Time between selection and departure (Question 3.1).....	213
Table 5.24 Pre-departure training and preparation (Questions 3.2, 3.3).....	214
Table 5.25 Training Time (Question 3.4).....	215
Table 5.26 Return Visits Home (Question 5.1).....	215
Table 5.27 Personal Support (Question 5.3).....	215
Table 5.28 Visits from the home base (Question 5.4).....	215
Table 5.29 Communication Links (Question 5.5).....	216
Table 5.30 Effectiveness of Communications (Question 5.6).....	216
Table 5.31 Appraisal (Question 5.7).....	216
Table 5.32 Actual duration of the assignment (Question 6.1).....	217
Table 5.33 Difference between planned and actual duration (Questions 2.6, 6.1).....	219
Table 5.34 Notice of a definite date for return (Question 6.2).....	220
Table 5.35 Choice about returning (Question 6.3).....	220
Table 5.36 Motive to return (Open Question 6.3).....	220
Table 5.37 Pre-return evaluation (Question 6.4).....	221
Table 5.38 Involvement in pre-return discussion (Question 6.6).....	221
Table 5.39 Pre-return expectations (Question 6.7).....	222
Table 5.40 Foreknowledge of job on return (Question 6.8).....	222

Table 5.41	Post-return assessments (Question 7.1)	223
Table 5.42	Subjects discussed after return (Question 7.2).....	224
Table 5.43	Post-return discussion involvement (Question 7.3).....	224
Table 5.44	Elapsed time between return and final settled position (Question 7.4).....	225
Table 5.45	Special occurrences after return (Question 7.5)	226
Table 5.46	Partner's career (Open Question P1.7).....	227
Table 5.47	Partner's Encouragement (Question P1.8).....	227
Table 5.48	Significance of the expatriate community (Question P3.3)	228
Table 5.49	Social interaction with host nationals (Question P3.4).....	228
Table 5.50	Partner's perceived role (Question P3.5).....	229
Table 5.51	Partner's international adjustment (Question P3.6)	229
Table 5.52	Repatriation adjustment (Questions P4.1, P4.2).....	230
Table 5.53	Comparison: International/Repatriation adjustment (Questions P4.3, P4.4)...	230
Table 5.54	Partner choose to live overseas again (Question P4.5).....	230
Table 5.55:	Correlations: Formality of the selection process	245
Table 5.56:	Correlations: Repatriation planning at the time of selection.....	247
Table 5.57:	Correlations: Frequency of return visits	252
Table 5.58:	Correlations: Pre-return planning.....	254
Table 5.59:	Correlations: Age and Tenure.....	257
Table 5.60:	Age as a significant variable	258
Table 5.61:	Age and other characteristics	258
Table 5.62:	Correlations: Marital status and children.....	260
Table 5.63:	Correlations: Prior expatriate experience.....	262
Table 5.64:	Prior expatriate experience as a variable.....	263
Table 5.65:	Correlations: Personal or Work-related motives	266
Table 5.66:	Correlations: Geographical destination.....	267
Table 5.67:	Geographical destination as variable.....	268
Table 5.68:	Geographical destination and assignment characteristics	268
Table 5.69:	Correlations: Duration of the assignment.....	269
Table 5.70:	Correlations: Learning and development.....	272
Table 5.71:	Correlations: Job Satisfaction	273
Table 5.72:	Correlations: Ability to utilise experience	274
Table 5.73:	Personal Characteristics as factors.	276
Table 5.74:	Personal Characteristics: Correlation Matrix.....	277
Table 5.75:	Personal Characteristics: Component Matrix.....	277
Table 5.76:	Factors that come into play at the time of selection.....	278
Table 5.77:	Selection Characteristics: Correlation Matrix	279
Table 5.78	Selection Characteristics: Component Matrix	279
Table 5.79:	Factors that come into play during the overseas sojourn.....	281
Table 5.80:	Sojourn Characteristics: Correlation Matrix.....	282
Table 5.81	Sojourn Characteristics: Component Matrix.....	282
Table 5.82:	Factors that come into play after return	284
Table 5.83:	Return Characteristics: Correlation Matrix	285
Table 5.84	Return Characteristics: Component Matrix	285
Table 5.85:	Relationships between Motives and Expectations.....	287
Table 5.86	Multiple Regression of Motivation (Career).....	290
Table 5.87	Multiple Regression of Motivation (Development).....	290

Table 5.88	Multiple Regression of Motivation (Money).....	290
Table 5.89	Multiple Regression of Expectation (Career)	290
Table 5.90	Multiple Regression of Expectation (Development)	290
Table 5.91	Multiple Regression of Expectation (Challenge)	291
Table 5.92	Multiple Regression of Expectation (Money).....	291
Table 5.93	Multiple Regression of Expectation (Long Term).....	291
Table 5.94	Summary of Multiple Regression	292

FIGURES

Figures

Figure 1.1	Identification of a Gap in the Literature.....	34
Figure 3.1	Repatriation: a very brief summary of the literature	112
Figure 3.2	Summary of responses from preliminary interviews	118
Figure 3.3:	Basic model of expectancy theory (from Mullins 1999)	126
Figure 3.4	The Porter and Lawler motivation model.....	128
Figure 3.5	A Three-Dimensional Model of an Organisation.....	133
Figure 3.6	Activity at the Boundary.....	136
Figure 3.7:	"Expectations" within the Porter and Lawler framework.	139
Figure 3.8:	Propositions.....	157
Figure 4.1	Questions about Expectations.....	176
Figure 4.2	Valid measures of central tendency.....	187
Figure 4.3	Variables and permitted procedures.....	195
Figure 5.1	Age (Question 1.6a)	206
Figure 5.2	Time between selection and departure.....	214
Figure 5.3	Actual duration of the assignment	218
Figure 5.4:	Results of multiple regression: Primary precursors to expectations	293

Chapter One

Introduction

Chapter One Introduction

1.1 Objectives of the Research

This thesis explores the process by which British organisational employees are selected for and despatched to international assignments and subsequently repatriated to and re-established within their employing organisations.

After examining literature indicating that such repatriation is problematical both for the individual and the organisation, the thesis focuses upon the role of individual expectation within the repatriation process. The study adopts a survey approach to determine the extent to which British repatriates generate work- and career-related expectations, and the extent to which those expectations are modified by organisational action, and by non-work factors.

1.2 Research Rationale

The original stimulus for this thesis stems from personal involvement in and experience of a problem-fraught repatriation.

There are additional reasons, however, that lead me to believe this thesis both relevant and timely:

- There is evidence that international assignments play an increasingly important role in international business, that repatriation from such assignments is characterised by problems for both the individual and for the organisation, and that failure to address such problems leads to inefficiencies in organisations that are attempting to prosper in increasingly competitive international markets.
- British organisational expatriates in general, and their repatriation to and reestablishment within their home-based organisations in particular have been left largely unexplored. Until recently, evidence about organisational expatriates has tended to be of North American origin, frequently anecdotal rather than empirical, and often appearing to lack a theoretical basis.
- The expectations that international assignees bring to their repatriation and reestablishment receive mention in the expatriate literature, but do not appear to have been researched in their own right. Individual expectations are central, however, to the concept of self-managed career within a psychological contract between employer and employee that has received increasing attention recently.

These stimuli are discussed in more detail below.

1.2.1 Repatriation: A personal perspective

The original stimulus for this research came from personal experience.

When I met and married my husband he was already a career expatriate with a UK-based international company. He expected reassignment to a new country every two or three years, and for seventeen years we led a gypsy-like existence, mainly in Africa and the Middle East. It was a way of life to which I rapidly became accustomed, and our daughters, born overseas, accepted it as perfectly natural.

It was also a way of life that eventually came to an end. Host countries became less dependent on expatriate engineers and managers, the requirement for a cadre of career expatriates dwindled, and my husband's employer decimated its expatriate corps and "returned" us to the UK. We found the experience unexpectedly difficult.

My husband originally viewed our return in a positive light. He reasoned that his first-hand knowledge and experience of managing profit-making overseas operations for an international company would logically be of value and demand in that organisations' headquarters. Although he had not sought the return to the UK, he conjectured that it might prove a blessing in disguise, an opportunity to engage his experience in a wider sphere, and a stepping stone to higher things.

In this he was proved wrong. He discovered that his technical skills were considered obsolete, while his managerial skills were considered comically inadequate. His new headquarters-based colleagues had neither knowledge nor interest in the countries, cultures and environments in which he had worked, despite those very countries providing the majority of the organisation's revenue and profit. Managing foreigners in an overseas setting was not considered real management at all, and was simply interpreted as a lack of managerial experience.

"Gardening leave" followed, which involved sitting at home on full pay and attending the occasional internal job interview. Eventually he was forcibly seconded to an unwilling and uncooperative subsidiary company. It was three years before he worked his way back into a position that made challenging use of his skills, abilities and experience and provided the responsibility, autonomy and status that he felt he was capable of.

It took us as long to accept our return to the UK as permanent, at which point I went back into education and achieved a degree. When offered the opportunity to undertake PhD research, I knew what I wanted to investigate. The manner of our repatriation still rankled: it could have been handled very much better, both by us and by my husband's employer.

My conclusion that our repatriation had been "handled badly" was neither structured nor formalised, which made it difficult to articulate or justify. But I felt that:

- my husband's return to his UK-based organisation had been unplanned, both before and after the event. The problems that he encountered integrating himself with his organisation's headquarters environment had not been inevitable, but should have been foreseen, addressed and ameliorated by proper planning and human resource management.
- the inaccuracy of our expectations led to disappointment, discouragement and despondency. The necessity to overcome those feelings, to modify an internal mind-set and to re-evaluate self-worth only served to exacerbate the difficulty of reintegration.

The personal stimulus for this research thus came about from first-hand knowledge and experience of a problem-fraught repatriation and a desire to better understand the causes of problems which continue to be reported for the current generation of British returnees from expatriation.

Personal engagement with a subject is not sufficient, however, to invest the thesis with a broader interest to both the business and academic communities. The next two sections, therefore, set out the key reasons why this topic is of also important to those communities.

1.2.2 Repatriation: A business perspective

Increased internationalisation and globalisation is of particular importance to Britain and to British organisations. The UK economy is dominated by large companies. Almost seven out of ten large companies in the UK are multinational. The British economy is internationally distinctive in terms of the multinational character that these large companies give to its corporate sector.

British companies are unusual in the extent to which their activities are located overseas. In the 1980s some 40% of the total employment of British-owned companies was located overseas, compared with 25% for American- and German-owned companies, and 20% for French- and Japanese-owned. This proportion had steadily increased over the previous decade (Marginson 1994).

Thus internationalisation has been particularly noticeable in Britain as more domestic companies of smaller and medium size seek to internationalise their operations. At the same time, MNCs that traditionally operate in the world market are having to adopt new strategies and new forms of organisation to meet the demands made on them by a rapidly changing world (Hamill 1989; Brewster 1991).

Britain faces increasing international competition, however, as witness the emergence of newly-industrialised countries on the Pacific rim (Adler 1986), the opening up of a free market economy in the EU, and the emergence of

Central and Eastern Europe from behind the former iron curtain (Marginson 1994).

In this competitive environment much of the advantage one firm will have over another will be knowledge about their particular global markets. Such knowledge is, in part, a by-product of employees' international experience obtained through exposure to international and multinational operations. (Oddou 1991)

As previously-nationalised firms begin to face national competition by internationalising, and smaller firms begin to enter the international arena, so the general trend has moved in the direction of greater use of expatriates (Mayrhofer and Brewster 1996; Brewster and Scullion 1997). Simultaneously, however, employees are demonstrating increasing resistance to international assignment caused by unwillingness to disrupt children's' education, growing consideration of quality of life issues, and couples' dual-career considerations (Scullion 1992; Forster 1999).

As a result, two thirds of British-based MNCs report shortages of international managers and almost 70% indicate that future shortages continue to be anticipated (Scullion 1994).

Nevertheless, the repatriation of international assignees continues to be a major problem for some British MNCs, especially those attempting to cope simultaneously with the downsizing and restructuring aimed at increasing efficiency in a climate of growing international competition. A majority have difficulty in finding suitable posts for returnees, and recognise that this leads to low morale, high turnover with its attendant loss of expertise, and increased internal resistance to international assignments. Similarly, individual returnees continue to report such problems as loss of status, loss of autonomy, loss of career direction, and inability to employ the skills and experience they acquired overseas (Adler 1981; Johnston 1991; Scullion 1992).

Increasingly, international assignments may have as their primary purpose the generation and retention of knowledge, and the development of global leaders (Black and Gregersen 1999). With the successful implementation of global strategies requiring the existence of an adequate supply of increasingly scarce internationally experienced managers, then, Scullion (1992) suggests that the most formidable task facing many British MNCs is the recruitment, development and retention of a cadre of managers and executives who understand and can operate effectively in the global market environment.

1.2.3 Repatriation: A theoretical need.

Most literature on management in general is from the USA, in which American researchers have observed the behaviour of Americans in U.S.- based organisations. Models and theories have then been developed upon these

observations. There has been an implicit assumption that these models and theories could be applied universally (Boyacigiller 1990; Adler 1991). Brewster and Burnois (1991), however, point out the sharp differences in approach to international staffing by US and UK multinationals, providing support for the view that we need a more European approach to international Human Resource Management (Harzing 1999).

As recently as 1986, Laurent described research into International Human Resource Management as still being in its infancy, although much work has been undertaken in the past decade.

Nevertheless, researchers have traditionally tended to concentrate upon one single aspect of an international assignment, to the exclusion of other aspects and factors. Such aspects have included:

- The role of the selection process in choosing expatriates more likely to adapt to foreign cultures, and thus less likely to "fail" on assignment
- The role of pre-departure training, particularly cross-cultural training, in assisting adaptation and thus reducing "failure" on assignment
- Expatriation compensation packages
- The difficulty that expatriates experience in adapting to host country environments and cultures, leading to "early return" from assignment or "failure" to work effectively during the assignment
- Problems experienced by both organisations and expatriates during repatriation.

Such focus and concentration generally precludes viewing an expatriate assignment as a continuous process having a duration measured in years. Clague and Krupp (1978) indicate that many of the problems that come into focus upon when an international assignee returns are composed of elements that developed in one or another stage of the complex process of expatriation. Thus it is necessary to examine both expatriation "leaving" and repatriation "returning" as part of an integrated whole, not as unrelated events in the individuals' career (Austin 1986).

Studies have, however, generally tended to concentrate on the perspective of HR managers, and on expatriate management in the context of the organisation (Welch 1991) - presumably because these were the areas practitioners were addressing on a day to day basis and therefore perceived as important. As a result we often know little about the international assignees themselves (Brewster 1991), even though the management of this group of employees is recognised as a major determinant of success or failure in international business (Tung 1994).

In the case of expatriate and repatriate expectations in particular, evidence has often been elicited from human resource managers rather than from the individuals forming those expectations themselves (Dunbar 1989).

In addition, much of the existing research suffers from one or more of the following flaws:

- There is relatively little empirical research that documents the international HRM strategies and practices of international firms having their headquarters outside North America. We cannot necessarily assume that North American findings can be applied globally. In particular, we cannot assume that North American findings are applicable in a British context (Brewster 1993). As a consequence, there is a paucity of empirical evidence concerning the international management of human resources within British MNCs, especially when compared with the large volume of literature on human resource management within US MNCs. (Brewster 1988; Hamill 1989; Forster 1994; Scullion 1995).
- A significant proportion of studies comprise surveys that draw attention to the issues involved but do not explore possible underlying relationships. Consequently most empirical studies do not have a theoretical underpinning (Black, Mendenhall and Oddou 1991; Peltonen 1997).
- Several researchers have pointed to a need to build on existing literature rather than replicating what is already known. (Dowling 1986).
- There is a tendency to treat expatriates as a homogenous whole in which corporate managers, students, missionaries and government employees are often treated as similar or identical (Gullick 1990; Storey et al 1991).
- Research generally tends to rely on information supplied by employing organisations, with relatively little information gathered from individual expatriates. Much of the literature in the human resource management area says little about managers themselves. (Storey et al 1991). This arises, in part, because international assignees in general, being by definition scattered around the world, prove a difficult group to research.
- As a result, little attention has been given to the way that individual responses to an international assignment may vary according to individual characteristics such as nationality, background, age, gender, or education. (Gullick 1990; Dean and Popp 1990).

In the midst of this frequently atheoretical, fragmented research, one particular under-researched dimension of international assignments is the experiences of international assignees returning to their countries of origin. What research exists suggests that the experiences of returning expatriates merits serious attention (Johnston 1991; Scullion 1993; Forster 1994; Tung 1997).

One aspect of their return that is becoming increasingly important and relevant is the nature and strength of the expectations that international returnees bring

with them. Organisations require to know and understand such expectations as they attempt to assist and empower their employees in general, and their international assignees in particular to manage their own careers within the framework of a psychological contract (Hiltrop 1995).

In summary, then, this thesis is relevant and timely because it attempts to extend the bounds of knowledge of a subject not only recognised by academics as meriting additional research, but also of growing interest and importance to practitioners in international business.

1.3 Research Contribution

The literature review which follows in Chapter 2 will indicate that a significant proportion of the literature on repatriation is concerned with identifying problems: problems encountered by the individual assignee on returning from an expatriate assignment, problems encountered by the organisation in attempting to absorb and reintegrate returning assignees, the deleterious effects of these unmanaged problems, and prescriptive solutions to those problems.

Chapter 3 will show that, as a precursor to this study, I interviewed International Human Resource Managers in a number of British organisations to determine whether the problems referred to by the mainly North American literature were likely to be prevalent in Britain.

In the course of comparing the transcripts of these interviews with the literature, I noted that the majority of interviewees, completely unprompted, referred in one way or another to the difficulty in meeting returnees' expectations. Some pointed directly to returnees' "unrealistic" or "excessive" expectations, others noted the difficulty that they experienced in attempting to provide jobs or positions which met returnees' expectations, while others simply stated that their returnees were frequently "disappointed" with the jobs and positions on offer.

The literature also contains references to repatriates "excessive" or "unrealistic" expectations, the difficulty in meeting those expectations, and the resultant individual "disappointment".

In pursuing this thread, however, I soon determined that very little seems to be known about returnees' work and career expectations: the literature refers to "expectations" and "disappointment" in very much the same vague way that my interviewees had done. The literature provides little indication of whether these expectations arise before, during or after the assignment itself and little indication of what influences those expectations.

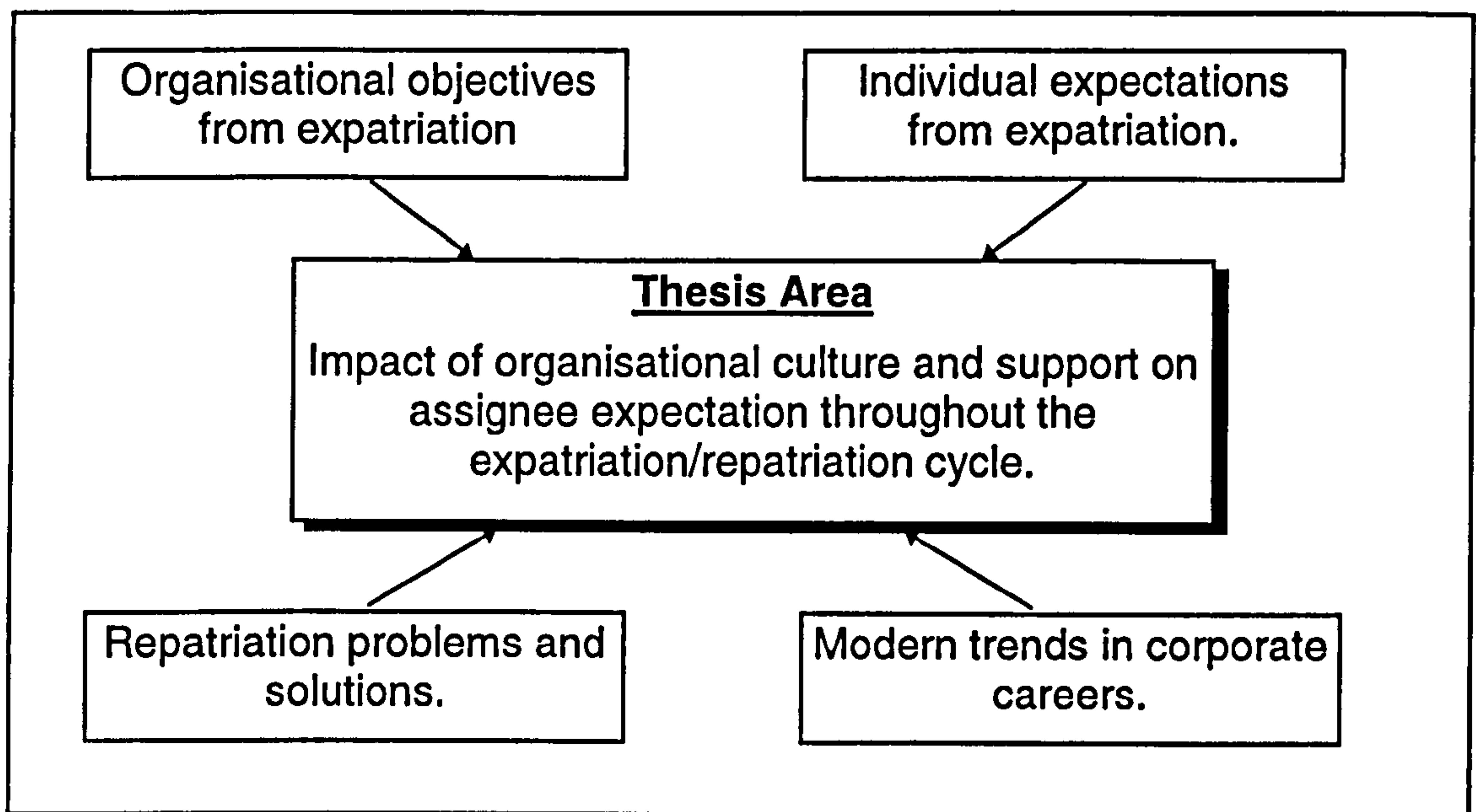
The literature does contain the occasional prescriptive advice to organisations to the effect that they should "manage" or "influence" their expatriates'

expectations, although there does not appear to be any research to indicate whether expectations are affected by aspects of such “management” or “influence”, or whether such organisational action has any effect upon the outcome of subsequent repatriation.

This thesis therefore addresses a perceived gap in the literature: the role of individual work and career expectations in the process of repatriating an individual from an expatriate assignment.

Figure 1.1 below shows where the present study is situated in relation to existing areas of literature.

Figure 1.1 Identification of a Gap in the Literature



The main aim of this study is to attempt to fill this gap. In doing so, it is envisaged that the thesis will make two contributions to theory:

- an increase in understanding of the career- and job-related expectations developed by individual expatriates before, during and after an expatriate assignment.
- a better understanding of how different organisational management cultures and actions influence those individual expectations.

1.4 Research Questions

In attempting to fill the gap in the literature described above, the following research questions have been developed:

- 1. What work- and career-related expectations do individuals generate before, during and after an expatriate assignment ?***
- 2. How are those expectations affected by organisational actions ?***
- 3. What other factors affect those expectations ?***
- 4. What relationships exist between factors affecting expectations ?***

1.5 Definition of “International Assignee”

Researchers and management practitioners already use a number of terms to describe mobile employees, including 'expatriate', 'secondee', 'transferee', 'assignee', 'transient', 'international executive', and even 'nomadic executive' and 'corporate gypsy'. These terms are frequently redefined to suit the immediate needs of the particular researcher, practitioner or organisation (Cobley 1987)

Of all of these terms, the most commonly used is the term 'expatriate', which appears to be generally accepted by social scientists, researchers and practitioners although it is, strictly speaking, a misnomer - the original meaning of 'expatriate' referred to an individual who was driven away or banished from his native country, or one who withdrew or renounced his allegiance to it (Cohen 1977). Indeed, the word 'expatriate' derives from a Latin verb meaning to exile, to banish, to expel, to ostracise or to proscribe. Over time, 'expatriate' came into use, first as an adjective to describe a person who had been expatriated, and more recently as a noun with a broader and more general meaning: an individual living in a foreign country. (The connotations of rejection and exclusion remain interesting, however, because they mirror phrases such as "out of sight, out of mind" and "the forgotten man" that the literature frequently uses to describe 'expatriates').

Rafferty (1989) points out the dangers of thoughtlessly labelling individuals: for example 'expatriate' can bring with it the connotation of colonialism, while more recently 'expatriate' has been associated with the 'loads of money' syndrome. Similarly, 'a third country national' can, to non-American ears,

conjure up a picture of poorly paid servants or workers and may be perceived as derogatory.

It is because dictionary definitions of 'expatriate' are so broad and general that researchers must frequently derive their own definitions of the term in order to more accurately describe the focus of their research.

Thus Cohen (1977), in drawing attention to 'expatriate' as a loose term capturing that category of international migrants who fill the gap between the tourist on the one hand, and the semi-permanent or permanent immigrant on the other, categorised 'expatriates' as voluntary temporary migrants who reside abroad for one or several of the following purposes:

- **Business:** private entrepreneurs, representatives, managers and employees of foreign and MNC firms, foreign employees of local firms, professionals practising abroad.
- **Mission:** diplomatic corps and other government representatives, foreign aid personnel, representatives of foreign non-profit making organisations, military stationed abroad, missionaries.
- **Teaching, research and culture:** academics, scientists (e.g. archaeologists, anthropologists, etc.) and artists. Presumably students should be included within this category.
- **Leisure:** owners of second homes abroad, the wealthy, the retired living abroad and other 'permanent tourists', bohemians and drop-outs.

Clearly, individuals within Cohen's 'Mission', 'Teaching' and 'Leisure' categories are less generally suitable for management studies than those within his 'Business' category. Even that category proves remarkably diverse, however, because it includes entrepreneurs, contractors and those going under their own steam to work overseas, in addition to corporate employees assigned temporarily or permanently abroad.

The British Institute of Management Studies' "Factsheet No.1" entitled "The Management of Expatriates" (1988) examines the many potential meanings inherent in the term 'expatriate' and points out how complex it can be to define and classify 'expatriates' for the purposes of management studies.

This paper takes its basic definition of 'expatriate' as any person who is working outside the country that, by reasons of nationality or long term residence, may be regarded as their country of origin and to which they are expected to return. This basic definition embraces a variety of categories of expatriate assignment that may be defined in a number of different ways, not necessarily mutually exclusive. In particular, the paper points out the considerable shading of meaning in the use of these terms within different organisations and contexts.

The paper goes on to describe the term 'expatriate' in the context of those individuals posted overseas by an employer with the intention of repatriation to the home location at the end of the work assignment(s), while excluding those

individuals who, of their own volition, go abroad and find work on local terms and conditions of service.

The paper indicates a number of ways in which 'expatriates' may be classified:

- by Country of Origin, usually in two sub categories depending upon whether the expatriate is a national of
 - * the country in which the international headquarters of the employing company is based, or
 - * any other country other than the country in which the international headquarters is based. Individuals within this sub-category are often referred to as Third Country Nationals, or TCNs.
- by Length of Assignment, usually in three sub categories:
 - * Short Term Assignments, of less than one year
 - * Regular or Normal Foreign Service Assignments, lasting for a defined or unspecified period in excess of one but not normally for more than five years
 - * Long Term or Indefinite Assignments, for example resulting from an organisation based in one country recruiting in the international market for staff for service in that country on a long term career basis, or resulting from transfer within a MNC for indefinite service in the headquarters or within a major business centre.
- by Nature of Assignment:
 - * International Career Assignment, usually of staff who have joined the organisation with a view to long term international service
 - * Career Development Assignment: a regular assignment within an international organisation that forms part of a specific career management or management development programme and usually implies return to the country of origin or previous employment (often as promotion) as the next step
 - * Loan Assignment: such assignments usually imply return to the previous employing country, often in the same or similar position to that held prior to assignment
 - * Contract Assignment: an assignment for a contractually defined period to meet a specific skill need in the country of assignment and usually implying no long term employment prospects within the organisation.

The paper also defines two other terms that are regularly used when discussing expatriate assignment:

- The 'Base Country' or 'Home Country' is the country of origin of the expatriate. This is usually the country of nationality to which the expatriate is expected to return on completion of the assignment, or at the end of an international career
- The 'Host Country' is the country to which the expatriate is assigned and will normally be resident in for the duration of the assignment.

There have been frequent proposals for the definition of consistent terms and classifications in the past. Thus Vivian (1968) proposed the classification of Expatriates into:

- Short Term Expatriate: one who undertakes an overseas assignment with a duration of a few weeks or months, or a temporary contract employee abroad.
- Professional Expatriate: one who works abroad for most of their career without being assimilated into the host country.
- Assimilated Expatriate: one who undertakes a long term assignment to a single country or area, who has integrated into their adopted society, often married a local national, and who has adapted to the local way of life.
- Temporary Expatriate: a national on medium term assignment, often at the initial phase of an operation who trains local personnel to take their place.

Similarly Cobley (1987), in arguing a need for a consistent system of categorisation, proposed the following:

- an Assignee is an employee who moves between countries within a corporation for a limited predetermined period, often up to 3 years, but who retains an employment connection with the home country.
- a Transferee is an employee who moves between countries with a corporation on a permanent basis, transferring employment contract from the old to the new country, and who becomes an employee of the new country
- an International Employee is one who make a series of international moves either on assignment or transfer, whose career pattern causes the loss of a home country connection.

Even as late as 1990, Gullick saw reason to draw attention to the diversity captured by the term 'expatriate' by quoting Cohen (1977:6)

"Little attention has been paid to 'expatriates' as a sociologically distinct category, partly because they comprise a mixed and diffuse population, difficult to define and classify, that lies outside the

traditional interests of such branches of sociology and anthropology as the studies of migration, of minorities or of ethnic groups"

and indicating that little had changed in the interim.

Oddou (1991), in a study based primarily on a survey of 165 expatriates, found three basic types of expatriate:

- the **high potential** employee, sent on one or more extended overseas assignments to enrich their perspective of the company's total operations;
- the **interested and available** employee, assigned internationally simply because the post is available and the employee would like to go. In such cases the firm has no particular investment in filling the post with a home or host national, but simply chooses an employee who is willing, qualified and available;
- the **technical expert**, sent to act as technical support for one of the company's products. In this case the product nearly always originates from the domestic operation and is now being manufactured or marketed overseas, and the firm sends an employee who is intimately familiar with the product.

Oddou stated that most firms having international operations frequently send both interested and available employees, and technical experts to international assignments. Only a very few, however, regularly send high potential employees to international assignments as part of a formal career path.

Brewster (1991) drew attention to Europe as an international arena, with business people in Europe spending increasing amounts of time operating outside their own country. He noted a gradation from the individual who travels regularly two or three days a week; through to those who spend weeks or months (perhaps on a particular project) in a hotel near to a supplier or potential customer or part of their own company's operation; to those he calls expatriates, who are sent to live in another country for a period of time; through eventually to those who emigrate on a more or less permanent basis.

Brewster went to considerable lengths to define an 'expatriate' as a member of a comparatively homogenous population as:

- an employee of an organisation who is sent on a temporary work assignment in a different country from their home country (or the country that they consider as the main place of abode). The assignment, albeit temporary, is of a length that necessitates moving the expatriate's family (i.e. partner and children) to the host country or, if unmarried, would do so if they were
- and, simultaneously, an employee who, while undertaking an assignment as above, meets the organisation's own criteria as an expatriate and is compensated under expatriate terms and conditions including, for example, expatriate allowances and leave visits

- including, if necessary, an employee working in an international joint venture if their employer otherwise is the home or host country partner, and the employee is working under expatriate terms and conditions
- excluding those who move permanently or emigrate to another country, even if they continue to work for the same organisation, or any home country organisation, and they are treated as normal employees within the host country
- excluding those employees working for an international joint venture whose employer is the host country partner, and who are not covered by expatriate terms and conditions
- and excluding those who stay in the host country at the end of an expatriate assignment, and revert to a normal employment situation, or retire.

Finally, a paper by the Institute of Personnel and Development (IPD) (1997) indicated that, while the term "international manager" used to apply to a closely-knit group of mainly British managers who were almost permanently mobile and occupied many of the key roles in a federation of business across the world, that term now refers to someone who primarily lives and works in his or her home country, but has a global perspective and the ability to manage across boundaries.

The discussion above indicates the potential variety of individuals that may be included within the umbrella population of 'expatriates'. This thesis necessarily concentrates upon a sub-set of that population, and that sub-set requires definition. The necessity for concentrating upon a defined sub-set of 'expatriates' arises because one of the purposes of this study is to reach a better understanding of the dynamics within the chosen population. Failure to define a consistent and reasonably homogenous population for the study would inevitably lead to a comparison between groupings, and would obscure (if not invalidate entirely) the ongoing dynamics within the target grouping.

As will become clear, this thesis concentrates upon 'expatriates' who conform to Brewster's clear and concise definition. This avoids the necessity to "reinvent the wheel" by creating yet another 'expatriate' definition. So long as each and every research paper redefines 'expatriate' in its turn, so it remains difficult (if not impossible) to compare, contrast and reconcile work by different researchers at different times.

Within the remainder of this thesis, expatriates meeting the Brewster definition will be labelled "Assignees". It is intended that this label, which occurs only infrequently within the general literature on expatriates and expatriation, will serve to remind the reader of the narrow, specialised definition which is imposed upon the subjects of this research.

It will be made clear at a later stage that data for this study was captured from returned assignees. In order to ensure considerable homogeneity among the

participants in this study, a number of questions were posed in order to restrict the population of participants to: **permanent, full-time, British employees of profit-making organisations expatriated from Britain to undertake assignments in a foreign country lasting not more than five years, with the fulfilled expectation that they would return to Britain for continued employment by their organisations.**

It will be noted that this definition builds upon, but is stricter than Brewster's, in that it restricts participants' nationality (British) and home country (Britain), sets a five-year time-limit on the duration of their assignments, and restricts their employing organisations to profit-making ones.

1.6 Outline of Thesis Chapters

Chapter Two presents the key areas of theory underlying the research topic.

Chapter Three develops the theoretical framework for the thesis, identifying the gaps in the literature and presenting the research questions.

Chapter Four explains the methodology adopted for the current study.

Chapter Five presents the findings relating to the research questions.

Chapter Six presents a summary of the findings from the overall study against the original research questions and identifies the contribution of the study to academic knowledge and organisational practice. It acknowledges the limitations of the study and identifies areas of further research.

Chapter Two

Literature Review

2. Literature Review

The purpose of this chapter is to review the literature on the expatriation of employees to international assignments, and the repatriation of those employees for reabsorption into their home-based employing organisation.

The review commences by examining the **reasons** and rationales for organisations to send their employees overseas to international assignments, and continues by considering the **motives** that cause individual employees to accept such international assignments.

The chapter then considers a significant body of early literature that revolved around the apparently frequent **failure** of international assignments, and the actions and precautions that organisations could take to avoid or reduce the level and frequency of failure.

The chapter continues by examining the early literature on the repatriation of international assignees, a literature frequently expressed in terms of the **problems** facing repatriated assignees and their employing organisations, together with actions that could be taken to avoid or overcome such problems.

The chapter concludes by describing how more recent literature takes into account changes in the business climate and environment of the 1980s and 1990s by considering expatriation in terms of **strategic international human resource management**, in which individual motives and expectations are placed in the context of a psychological contract between employer and employee.

2.1 Rationales for International Assignments

This review of the literature commences by examining the reasons and rationales behind the expatriation of organisational employees. Organisations bear a number of costs in sending their employees on overseas assignments, and there must be some presumption that they have good reasons for doing so.

A seminal paper by Edstrom and Galbraith (1977), much quoted in subsequent literature, proposes three reasons that organisations use international assignments:

- to fill a position
- for management development
- for organisational development.

Their study began with a one-day workshop of 10 European multinational corporations, and continued by conducting case studies with the four organisations that appeared most interested in the enquiry.

All four organisations used international assignments **to fill a position**.

The primary purpose of such an assignment is simply to fill a vacancy that cannot be filled locally by a host-country national. Such an assignment is generally to a developing country, based upon actual or perceived lack of local manpower qualified to fulfil the requirements of the job. The assignment may also involve some element of transferring technical and administrative knowledge (from home to host country and organisation) to allow the position to be "localised" in the future. These are frequently lower-echelon positions and generally of a technical nature.

Assignments of this nature can be associated with the start of a new operation, a major organisational change, investment in a new factory or the start-up of a new joint venture, when transfers from the centre can provide a temporary source of management or technical capacity that can easily be removed once local employees can carry the load.

Brewster and Scullion (1997) point out that such assignments are gradually becoming less frequent with increasing levels of education and industrialisation in developing countries, and speculate that their utilisation may, in the past, have included an element of parochial racism encapsulated in the "developed" and "developing" labels.

Organisations in Edstrom and Galbraith's study (Ibid.) cited **management development** as another reason for international assignments.

An international assignment requires the assignee to live and work within different social systems and to interact with differing national and organisational cultures. Not only does this provide the individual with insight into the foreign operation itself: there is some evidence that such interaction

creates managers who are more tolerant of diversity, more adaptive, and better placed to introduce innovation.

An international assignment may consequently be used as form of training and development to provide individuals with personal international experience and professional development that may be employed on future tasks both in subsidiaries abroad and with the parent company.

The learning and development may arise from a number of avenues, including:

- exposure to new cultures, environments and situations;
- the potential to develop new technical or managerial skills based upon a wider view of the corporate group and its major technical, economic or administrative systems;
- a better understanding of the individual's position within the overall corporate system;
- an opportunity to manage operations away from headquarters;
- the necessity to take decisions and assume responsibilities in ways which are simply not possible within the bureaucracy of a corporate headquarters.

Hamill (1989) found that British organisations have typically used international assignments to develop their managers for increased amount of responsibility but that the same cannot generally be said of US firms"

Edstrom and Galbraith, however, were not entirely convinced by organisational claims of management development through international assignment. They state:

"[two companies] claimed to be using transfer for management development also. They probably were, but we doubt that they would have been if there had been no positions available in developing countries. They did not have the ability to place employees if no requests came from the subsidiaries" (Ibid. : 254).

They point out that the structures and processes required to implement transfers to fill positions are different to those required for personnel development. Filling positions simply requires the organisation to be reactive: a subsidiary, having an unfilled position, recognises the need for transfer and so initiates, manages and pays for that transfer. On the other hand, an organisation setting out deliberately to develop personnel through international transfer requires a personnel department having an information system to identify positions and trainees, and sufficient power to convince a subsidiary to accept an expatriate rather than a local employee.

A third reason proposed by Edstrom and Galbraith (Ibid.) for organisations to utilise international assignments is for **organisational development**.

It should be noted that organisational development as a rationale for international assignments was not put forward by the practitioners themselves. Edstrom and Galbraith noted that one of the four participant organisations was significantly different: it transferred employees in greater numbers, more frequently, at all levels. They concluded that this organisation, as an integral part of a control strategy, used international transfers to enhance decentralised co-ordination.

International transfers can allow managers at many levels and from various countries to learn about and contribute to company policy, and can forge and maintain both headquarters-peripheral and peripheral-peripheral personal contacts, leading to the development of a strong organisational identification. By utilising international transfers in this way, a multinational organisation may maintain a common culture with common policies and strategies despite allowing (or even encouraging) high levels of local autonomy.

When significant numbers of employees are transferred away from their home country for extended periods, but do not remain in one foreign assignment long enough to develop roots there, few opportunities arise for attachment to social systems other than the organisational social system. As a result, the organisation and its culture becomes the one constant factor in the life of the transferred employee.

Corporate development through international assignment may not always operate equally across the world-wide organisation. Ondrack (1985) studied two US and two European MNCs, and detected considerable differences between the utilisation of headquarters' nationals and other nationals. Subsidiary nationals might be transferred for training and development, but they would spend the majority of their long-term career in national subsidiaries or regional headquarters. Key control jobs and jobs at headquarters, however, were more likely to be filled by headquarters' nationals.

There is some evidence that organisations are seeking other (faster and cheaper) methods for organisational international development rather than international assignments. Oddou and Derr (1992) found that European MNCs tended to recognise internationalisation as important, and tended to use expatriation of home-country nationals to subsidiary host country assignments for this purpose. Organisations were investigating and experimenting with alternatives, however, including the development of international task forces, seminars for in-house personnel, and increasing expatriation of foreign nationals both into the corporate headquarters and between subsidiary countries.

Brewster and Myers (1989) found similar rationales to Edstrom and Galbraith (Ibid.) for organisational use of international assignees, but introduced two further reasons:

- national representation, and
- control

Organisations are frequently aware of the expectation by foreign customers, local customer organisations and foreign governments that senior executives in the local organisation will be headquarters' nationals providing **national representation** through their substantial, high-level public relations and marketing roles.

Pointing to the frequency with which expatriates hold chief executive officer and senior financial management positions, Brewster and Myers argue that their primary function is to **control** the local operation by taking responsibility for "bottom-line" financial results through understanding and interpreting corporate policy.

Personal control is often cited as a primary mechanism for integrating and co-ordinating world-wide activity (Torbiorn 1982; Brewster 1988; Bjorkman and Gertsen 1990; Mayrhofer and Brewster 1996). While mechanisms such as budgetary control can assist the enforcement of control, sending people abroad from headquarters is thought to be the most effective and efficient. Assignees who have internalised the norms, values and perspectives of the home country seem to produce a close compliance with central guidelines.

Scullion (1994), noting the number and scale of foreign acquisitions by British companies in the 1980's, stated that a linked reason for British organisations to use senior expatriates in controlling positions overseas was to maintain trust in key foreign businesses following major acquisitions.

A number of researchers have noted **variations** in organisational motives for international assignments, along both national and industry lines.

Tung (1982), for example, found the most important reasons for US-based organisations to send US nationals overseas were for control of a foreign enterprise during its start-up phase, and to overcome the lack of local technical expertise. European companies, however, cited management development as their most frequent motive.

Similarly Bjorkman and Gertsen (1990) studied Danish, Swedish, Norwegian and Finnish organisations. They noted that these countries are culturally and geographically closely related, yet found considerable differences in motives for expatriation and in the practice of expatriation between firms from different countries, firms from different industries, and firms with different numbers of expatriates.

Boyacigiller (1990) studied a US bank having 84 branches in 43 countries, and found that the proportion of US nationals in the branch management of foreign subsidiaries was higher in those countries and branches having higher levels of operational complexity, political risk, cultural distance from the US, and interdependency with other countries. He suggests that each nation-state and each subsidiary branch is considered individually when deciding upon relative levels of control by and staffing from the US headquarters.

In the British context, Forster (1997) raises serious questions about the rationale underpinning the development of "international managers", a term

that he found little recognised by either the British organisations or employees that he studied. He found that few, if any, had any coherent idea of what "international manager" actually means. Their foreign policy initiatives seemed to be driven by short-term ad-hoc demands from senior and line management rather than from a conception of what their international work force should look like in the future. Their operations may be becoming more globalised, but their staff, he decided, are not.

2.2 Individual Motives of International Assignees.

While organisational motives for assigning their employees to foreign countries may be easy to understand, the reasons for individual employees accepting assignments that require a temporary overseas sojourn remain relatively unexplored (Edstrom and Galbraith 1977; Marshall and Cooper 1979; Torbiorn 1982; Tung 1982; Brewster 1988; Brewster and Myers 1989; Scullion 1991).

Individual motives for accepting international assignments are frequently based on anecdote, and more often than not based upon statements by corporate human resource managers rather than by assignees themselves. For this reason, two studies are of particular interest both because they are based upon empirical data and because they took place in a European environment.

First, Torbiorn (1976) asked personnel managers at the headquarters of Swedish companies why their personnel applied for or accepted overseas assignments. Personnel managers ranked their employees' motives as follows:

Rank	Motive
1	Better economic conditions on employment abroad.
2	Increased prospects of future promotion with employment abroad as a background.
3	Desire for new experience - "Wanderlust".
4	Employment abroad indicated immediate promotion.
5	Dissatisfaction with prevailing home conditions.
6	The assignment abroad gives possibilities to improve in their field.
7	Restricted career possibilities within the parent company.
8	Desire to escape from personal problems at home.

Then Borg (1988) asked Swedish managers who had accepted an international assignment to rank these descriptions to best describe their own motives for accepting. Managers ranked their own motives as follows:

Rank	Motive
1	Desire for new experience - "Wanderlust".
2	Better economic conditions on employment abroad.
3	Increased prospects of future promotion with employment abroad as a background.
4	Employment abroad indicated immediate promotion.
5	The assignment abroad gives possibilities to improve in my field.
6	Desire to escape from personal problems at home.
7	Dissatisfaction with prevailing home conditions.
8	Restricted career possibilities within the parent company.

These individual motives uncovered by Torbion and Borg are considered in more detail below:

- **"Wanderlust" - A desire to travel.**

Borg speculates that "wanderlust" is an important factor for those managers who have risen close to their limit in the organisation: they have become over-qualified for their job, and promotion prospects may be scarce.

- **Immediate Financial Reward**

Borg suggests that personnel managers may consider financial incentives to be the strongest motive of all for accepting an international assignment simply because employees emphasise their remuneration package when negotiating the terms and conditions of their overseas deployment.

Adler's 1986 study also found that individuals may accept an international assignment for immediate financial reward. Given the frequent reference in the literature to the "high cost" of maintaining expatriates abroad, it is not surprising that such an attitude is common. Indeed, at one time there was a common perception that an individual's primary reason for accepting an international assignment was immediate financial reward. Thus Vivian (1968) wrote:

"The usual method multinational enterprises use to reconcile corporate and individual goals in a complex foreign environment has been the 'pay-off'. Taking the form of some premium for foreign service and often supplemented with allowances for

shelter, cost-of-living differentials, tax equalisation and educational assistance, payment to expatriates represent significant expenditures for the large majority of employers engaged in overseas operations.

Such foreign compensation programs are designed to obtain the individual's acquiescence in restructuring his hierarchy of needs - generous monetary rewards in lieu of self-improvement."

In addition, companies may offer substantial levels of overseas salary in order to increase the attractiveness of certain foreign posts, particularly if the assignee is likely to experience hardship or danger there (Dowling and Schuler 1990).

Certainly the degree of remuneration that the assignee can expect remains an important consideration: Adams et al (1994), in a survey of 205 international assignees, found salary to be one of the key factors in an assignees' decision to move overseas. Similarly, the Harvard-Amrop study of international executives found that the three top inducements that organisations used to motivate individuals to accept international assignment were cash-related, including relocation assistance, attractive benefits packages, and an attractive financial package.

Tung (1997) speculates that this may be a classic, self-perpetuating, "chicken and egg" dilemma. Which happened first, she asked: companies incenting candidates to accept international positions, or candidates accepting overseas jobs because the financial rewards are great?

If the purpose of the transfer is simply to fill a position (with little or no intention of individual or organisational development) then the organisation may be tempted to bribe the individual with monetary incentives that cause the assignee to overlook the obvious career risk in accepting a job that is not integrated into the organisation's development program. However, if an international transfer is a means of organisational development, then the international experience should be reward in its own right leading to promotion and key positions within the company. In such a case, substantial monetary reward may be dysfunctional by attracting the wrong candidate for the wrong reason (Edstrom and Galbraith 1977).

- **Career Advancement**

Borg took "Better prospects of future promotion with employment abroad as a background" to imply that, at least in some companies, overseas experience is necessary for promotion in the domestic organisation.

There is near-unanimity in the literature that, at the time of their selection, international assignees from industrialised countries expect (rightly or wrongly) that the international assignment will enhance their career

prospects (Shahzad 1984; Adler 1986; Forster 1994). The international assignment is commonly viewed as an opportunity to acquire increased experience, responsibility, prestige, status and visibility leading to career advancement within an international organisation (Harvey 1985). Assignees tend to view an overseas assignment as a stepping stone in their career, expecting to return to headquarters in an improved position, ready to negotiate and argue about their employment contracts (Brewster and Scullion 1997).

A number of recent surveys support this contention. To cite but two: Adams et al (1994) surveyed 205 international assignees to find "career development" to be key to assignees' decision to move overseas, while Suutari and Brewster (1998) found that 91% of 251 Finnish expatriates believed the assignment would influence their career development positively.

It is not always clear what leads assignees to form these positive career-related expectations. Despite organisations dismissing such expectations as "unrealistic", Oddou (1991) found that 83% of 165 international assignees felt that their employing organisation had led them to expect international exposure to have a very positive effect upon their career. They complained that, although their expectations had been built up about how the assignment was going to rocket their career into stardom, the end effect often turned out to be neutral or negative. Interestingly, although so many reported the perception that positive expectations of career enhancement had been fostered by the organisation, only one-third reported that the organisation had given them any clear idea about their career path upon repatriation.

Oddou (Ibid.) indicated that three basic types of expatriate (the *high potential* employee, the *interested and available* employee, and the *technical expert*) tend to have different degrees of positive expectations from their assignment. On the other hand, he points to mechanisms that would tend to produce positive career-related expectations in all categories of assignee. The *high potential* employee tends to be aware of that high potential status, and aware that a primary function of the assignment is grooming for eventual promotion. *Interested and available* employees appear to reason that, even if their current employer will not value their international experience, some other firm may do so in the future. *Technical experts* report that, even though they themselves see little reason to expect international experience to be of significant career value, others in the company frequently lead them to believe that the experience may have far-reaching career effects.

This tendency for career-related expectations of expatriation to be homogenised by myth, self delusion or misleading selection interviews is echoed by Peltonen (1997), who indicates that "low-potential" employees, unaware of their "low-potential" status, misinterpret the

signals surrounding their international assignment and thereby derive falsely positive career-related expectations.

An ECA survey (1994) of 500 European multinational corporations found that, although most companies considered international experience to be valuable, very few could actually demonstrate that going abroad was reflected in enhanced career progression.

- **Challenge**

Borg surmised that "Employment abroad indicated immediate promotion" probably indicates that the employee will be given greater responsibility in the overseas assignment than would be experienced at home, and there are frequent claims in the literature that individuals accept an international assignment because the job itself will be interesting, exciting or challenging (Tung 1988a).

In this regard, individuals may consider an international assignment in a similar manner to the way that they consider a domestic job move: Nicholson and West (1988) found that managers between the ages of 25-45 were changing jobs every three years, not from a restless search for high pay, but from the quest for challenge, learning opportunity and creativity.

Adler's (1986) survey of MBA students from business schools in the USA, Canada and Europe found one of their main reasons for accepting an international assignment was the job itself, in terms of more challenging work with more autonomy or responsibility. Similarly, Adams et al (1994) found job interest to be key to assignees' decision to move overseas.

- **Learning and Development**

Borg took "Employment abroad gives possibility of improvement in field" to mean exposure to a technology or skill not in use at the parent company, or exposure to management experience, or the opportunity to learn about the foreign products and markets.

Edstrom and Galbraith (1977) found that international assignees tended to view the purpose of their overseas assignment as development for future executive responsibility. There are frequent references in the literature to an international assignment to a smaller office with few support staff offering the individual an opportunity to develop broad skills and become experienced in all aspects of the business by acquiring hands-on nuts-and-bolts experience that would be impossible to gain in a large operation: thus Daspin (1985) noted that an international assignment offers an opportunity to undertake more "strategic" responsibilities by becoming a "big fish in a small pond".

Adler's 1986 study also found opportunity for cross-cultural learning and personal growth to be a prominent reason for assignees accepting an international assignment.

That such expectations are commonplace is indicated by Suutari and Brewster's (1998) finding that 99% of 265 assignees believed that they would develop skills during the assignment, and that this development would be valued by their organisation.

Negative (push) or positive (pull) motives

The motives that cause individuals to accept international assignments are generally seen as "positive", (pull) motives including a special interest in a particular host country, increased promotion prospects, wider career opportunities or generally more favourable economic conditions.

"Negative" (push) motives have also been described, however, including the fear that refusal to move may lead to loss of future promotion prospects (Marshall and Cooper 1979), or the use of an international assignment as a 'fresh start' to **escape** from existing work, personal or social problems in the home country (Misa and Fabricatore 1979; Heller 1980). Indeed, Austin (1986) asserted that some element of dissatisfaction probably plays a part in the acceptance of any overseas assignment, even where such assignment is a normal part of career progression in a particular organisation.

Three of the motives uncovered by Torbion and later researched by Borg could be labelled "negative" (push) motives: "Desire to escape from personal problems at home", "Dissatisfaction with prevailing home conditions" and "Restricted career possibilities within the parent company". It might also be argued that "wanderlust", at least from an organisational perspective, is more "negative" than "positive".

It is significant that Phatak (1983) considers assignments that have been accepted for such "negative" reasons to be less likely to succeed. Thus Baughn (1992), in a study of 212 US returnees from international assignment, found that employees for whom anticipated career advancement was a major reason for accepting the international assignment tended to report higher levels of learning and development during the assignment. By contrast, there is some evidence that job changers who feel coerced into taking transfers and promotions against their will or because of implicit threats of being "dead-ended" have more negative attitudes toward, and more trouble adjusting to, their new job assignments (Black and Stephens 1989; Feldman and Thomas 1992).

Variation in Motivation

A number of researchers suggest factors that may affect the motives and motivation of individuals accepting international assignments.

Nationality.

An individual's perception of expatriation is likely to be formed by his or her national culture. In Japan an overseas posting is often referred to as an unlucky assignment, while in the US a tour of duty abroad is often seen to mean giving up one's position on the company's promotion escalator (Boyacigiller 1990; Marrani 1992). In Britain, working and travelling overseas is very much part of the national culture (Tung 1987), where expatriation is often seen as a logical and normal stage in one's career within an international organisation (Furnham and Bochner 1986).

Educational Qualifications

Expatriates increasingly are educated to degree or MBA level, and will generally expect a single international assignment followed by a return home: occasionally they may undertake a second assignment later in their career. Such expatriates are likely to view a foreign assignment as part of a career, and expect to return to headquarters with increased skills and knowledge, in an improved position to negotiate the continuation of their career with their employing organisation. (Brewster and Scullion 1997).

Destination.

The geographical location of the host country can be an important factor in influencing an individual's decision to accept or reject an overseas assignment (Miller and Cheng 1978; Torbiorn 1982). Tung (1997) found that employees are not likely to commit to an assignment anywhere in the world: many are selective about the country or region to which they may be assigned.

Partner Encouragement

Miller and Cheng (1976) found that, when making the decision to accept or reject an overseas assignment, assignees took encouragement from family and others to be an important input into that decision-making process.

Although the international assignment may seem to the assignee to be an important career move holding the promise of more responsibility, higher compensation and greater job autonomy, it is often a sudden interruption of the partner's own career and long-term social relationships. Consequently, the partner may not always be as excited as the expatriate about accepting the overseas assignment.

Black and Gregersen (1991c) found that the more the partner was in favour of accepting the assignment, the more the partner engaged in self-initiated pre-departure cultural preparation and training. They also speculated that such

partners tried harder, on assignment, to adjust to the new culture and environment.

Prior Expatriate Experience.

Miller and Cheng (1976) found that those on their first international assignment considered it an opportunity to demonstrate technical competence in a wider arena, an opportunity for a general broadening of experience, and a necessary preparatory step for future moves into the top management positions of the organisation.

Assignees with prior expatriate experience, however, considered additional assignments to contribute little to their future advancement into the ranks of top management of their organisation. It is likely, as a consequence, that experienced assignees accept further foreign assignments because they have made the career choice to remain in the international business arena.

Presentation.

Harris and Moran (1979) suggested that the way in which the organisation presents the move to the individual is likely to be a key factor in how the individual views the move and its implications. Although it seems reasonable to assume that individual motives and expectations may be affected by the way the organisation "sells" an international assignment, this area remains little explored. The literature contains the occasional conjecture: for example, Misa and Fabricatore (1979) suggested that an international assignment may be viewed as exciting and challenging because of glamorous painting by well-intentioned recruitment officers.

Age

Marshall and Cooper (1979) suggested that different motivations will apply at different points throughout an individual's career. Individuals may be more willing to accept an international assignment while their career is still in its gestation stage. As their career matures, however, and monetary reward begins to take second place to mastering the job itself, individuals may be more likely to reject international assignments which do not contribute to visible career progression.

Although every individual career progression is unique, some general patterns may be expected. Thus Evans (1988) proposes three broad phases to career development:

- An *exploration* and self-discovery phase, lasting typically until the mid-30s, which involves developing skills, finding out what kind of work one likes or dislikes, and what type of company and work one values. Top-down career management may be appropriate during this phase,

with the emphasis on exposing the individual to opportunities within the organisation's structure, and identifying potential;

- An ***establishment*** phase, typically from mid-30s to (or beyond) mid-40s: years of advancement and high performance based upon the successful outcome of prior exploration. Career management may best involve a blend of top-down input from the organisation and proactive input from the individual;
- A ***mid-late career***, in which priorities become highly individualised and career management may be best based upon the individual's proactive input leading from those priorities.

Although it would be reasonable to expect, therefore, that international assignees' motivations and expectations would differ at differing ages and differing career phases, such a relationship remains relatively unexplored

2.3 Expatriate Failure.

A prominent issue in the early literature on international staffing has been that of expatriate failure - traditionally, defined as the number of staff who return home before the agreed end of an international assignment, either because of poor work performance or because they encounter personal problems overseas (Forster 1997). A significant body of literature developed around ways and means to avoid the expatriate "failure" that was commonly reported as frequent and expensive.

Expatriate Failure Rates

Particularly high failure rates were commonly reported for US MNCs, 25 to 40% for individuals assigned to developed countries, and as high as 70% for those assigned to developing countries (Mendenhall & Oddou 1985). In addition, it was sometimes stated that 30 to 50% percent of expatriates remained in their foreign assignments even though considered marginally effective (if not actually ineffective) by their organisation (Black, Mendenhall & Oddou 1991).

Brewster (1991) indicated that the source of some of these failure rates was unclear, and suggested that actual failure rates were probably somewhat lower in Europe, particularly given the empirical studies conducted by himself and by Tung (1982). Scullion's (1991) findings also indicated that European failure rates were lower than those reported from North America.

Harzing (1995), in a devastating critique entitled "The persistent myth of high expatriate failure rates", demonstrated in embarrassing detail how, in paper after paper, figures for expatriate failure rates had appeared from thin air, or had been miscopied from previous work, taken out of context, or misinterpreted. Her paper demonstrated that the very limited number of empirical studies actually indicate failure rates considerably below "25 to 40 percent", and suggest that these figures are somewhat exaggerated.

Table 2.1: Expatriate Failure Rates based on Harzing (1995)

<u>Researcher</u>	<u>Expatriate Home Base</u>	<u>Failure Rate</u>
Tung (1982)	U.S.A	20% to 40% (7% of firms) 10% to 20% (69% of firms) 0% to 9% (24% of firms)
Tung (1982)	Europe	11% to 15% (3% of firms) 6% to 10% (38% of firms) 0% to 5% (59% of firms)
Tung (1982)	Japan	11% to 19% (14% of firms) 6% to 10% (10% of firms) 0% to 5% (76% of firms)
Torbiorn (1982)	Sweden	25%
Brewster (1988)	Western Europe	generally less than 7%
Hamill (1989)	Britain	less than 5%
Scullion (1991)	Britain, Eire	generally less than 5%

Harzing suggested that :

"In view of the very limited number of solid empirical studies in this field, we should refrain from any exact figures on expatriate failure rates - measured as premature re-entry - in American and Japanese MNCs until at least one solid large-scale empirical study has been conducted on the subject. The only thing we can say with respect to Tung's study is that failure rates among American expatriates are generally higher than failure rates among West European and Japanese expatriates. But then, this study dates back to the late 1970s and I would expect some changes to have occurred in the last fifteen years".

She concludes that

"we can state with some confidence that West European and notably British expatriate failure rates lie somewhere around 5 per cent on average, which is actually very reasonable".

Forster (1997) supports the view that British failure rates, within this narrow definition as premature return, are reasonably low. He advises caution in this interpretation, however, by suggesting that the traditional definition of failure as premature return has limitations, and does not reveal the true extent of the problems which international assignments can cause to some expatriates and their dependants both during their time abroad and after returning to the UK.

Nevertheless, the earlier perception of international assignments as frequently associated with costly "expatriate failure" led numbers of practitioners to

consider ways and means to avoid, or at least reduce the incidence of such failure.

The high cost of failure

It became common, not only for "failure" to be reported as relatively frequent, but also for the direct and indirect costs of such failure to be reported as very high (Lanier 1979). In the case of U.S. expatriate recalls, the direct costs alone (including salary, training costs, and travel and relocation expenses) have been estimated to range between \$50,000 and \$250,000 (Mendenhall, Dunbar and Oddou, 1987). This perception goes hand-in-hand with the perception that expatriate salaries are relatively high (see page 52). In the British context, for example, it has been estimated that it costs 3 or 4 times as much to employ a British employee overseas than it does at home (Brewster 1988; Hiltrop and Janssens 1990).

In addition to these obvious direct and immediate costs of expatriate failure, however, Black, Gregersen and Mendenhall (1992a) listed a number of indirect costs, some of which are not readily expressed in monetary terms:

Direct moving costs: some \$30,000 to \$35,000 to ship out the assignee and his family, a similar amount to ship them back, and the same amount again to ship out a replacement. Direct moving costs alone thus total some \$100,000;

Downtime costs. During the assignee's pre-departure preparations, there is a period in which the individual is receiving a full salary but is not performing his or her duties fully. There is also a time, during the first few months of the global assignment, when the expatriate is adjusting to the new culture, the environment, and the job. The problem in the case of failed assignments is twofold. First, unlike expatriates who recover, adjust to, and perform well in overseas positions, those who fail provide no long-term return on downtime. Second, once an expatriate is overseas, the base salary, foreign-service premium, housing allowance, education allowance, cost-of-living differential, tax-adjustment allowance and so on usually at least double the total compensation package, and this doubles the cost of the adjustment downtime, for which there is no long-term return in the case of a failed global assignment;

Indirect Damage. In addition to these more measurable economic costs, there are significant indirect, difficult-to-measure costs to both the organisation and the individual. In the case of the organisation, a failed global assignment can result in damage to several important constituencies, including local national employees, host government officials, and local suppliers, customers and community members. If these damages occur, it will probably be harder for the replacement, even the most capable one, to repair them and effectively carry out other duties and tasks. Despite the difficulty of quantifying these costs,

they are sometimes the most significant ones. In the case of the individual, it is unlikely that a failed global assignment will help his or her career or self-esteem. In fact, many expatriates interviewed by Black et al said that they stayed in their global assignments only because they feared the negative consequences of leaving early.

The importance of indirect or "invisible" costs rises with the level of position being considered. For example, an expatriate head of a foreign subsidiary who subsequently proves to be unsuitable for this job may damage relations with the host country government and other local organisations and customers. This may result in such outcomes as loss of market share, difficulties with host government officials, and demand that parent country nationals be replaced by host country national employees (Mendenhall, Dunbar and Oddou 1987; Brewster 1991);

"Brownouts". "Brownouts" are managers who do not return prematurely but are nevertheless ineffective in the performance and execution of their responsibilities. Some have estimated that between 30% and 50% of all U.S. expatriates fall into this category (Copeland and Lewis 1985; Forster 1997);

Downward-Spiralling Vicious Cycles. All these costs combine to create circumstances that set off a downward-spiralling vicious cycle, which may erode or even destroy a firm's global competitive advantage. Failed global assignments, rumours of "brownouts", and repatriation turnover problems can lead the best and the brightest throughout an organisation's world-wide operations to view global assignments as the kiss of death for their careers. This reputation makes it difficult to recruit and send top-quality candidates, which in turn increases the likelihood of more failures. This downward-spiralling quality of candidates and performance can feed on itself, gaining momentum with every turn. This vicious cycle may lead to a shortage of leaders who have vital international understanding and experience, which in turn can lead to poor strategic planning and implementation and to an ever-worsening global competitive position.

In facing these high reported costs of expatriate failure, then, both practitioners and academics have investigated the causes of failure, and recommended ways and means of avoiding or reducing the incidence of such failure.

Causes of failure

Tung (1982) asked a sample of MNC managers in US, Europe and Japanese MNCs to indicate reasons for expatriates' failure to function effectively in a foreign environment.

The main reasons reported by US managers, in descending order of importance, were:

- inability of the expatriate's spouse to adjust to the foreign physical or cultural environment
- similar inability of the expatriate to adapt to the foreign environment
- other family related problems
- the expatriate's personality or emotional maturity
- the expatriate's inability to cope with the heavier levels of responsibility required by the overseas work
- the individual's lack of technical competence for the job, and
- lack of motivation to work overseas.

The reason for expatriate failure or poor performance abroad most mentioned by West European managers was the inability of the expatriate's spouse to adjust to a different cultural or physical environment.

These findings are in line with Hay's earlier (1974) assertion that the "family situation" and "relational abilities" factors were most commonly responsible for failure or poor performance abroad. Family inability to adjust overseas has been identified by other studies, including Torbjorn (1982), Harvey (1985), Hamill (1989), Black, Mendenhall & Oddou (1991), Scullion (1991) and Harvey (1997). Thus, for example, Torbjorn's study (1982) found "happiness of the partner" to be the primary predictor both of the assignee's satisfaction with the assignment and of the assignee's adjustment to the foreign culture and environment.

The foreign environment and culture

There is general agreement that there are differences in both kind and degree between a domestic organisational transfer and an international transfer (Black, Gregersen and Mendenhall 1992b).

The difference in kind comes about because a domestic transfer involves moving within a country, while an international transfer involves moving between countries. Of the two, only the international element of the transfer exposes the transferee to a foreign environment and a foreign culture.

This leads to the difference in degree: that while any two domestic locations will exhibit organisational and environmental novelty, the international transfer will be more likely expose the assignee to considerably greater differences.

At its most extreme, these differences between home and host country have been described as causing "culture shock". Oberg (1960) created the concept of "culture shock" to describe an unpleasant shock or surprise; a generalised trauma experienced in a new and different culture in having to learn and cope with a vast array of new cultural clues and expectations, while discovering that the old ones probably do not fit or work.

Oberg envisaged culture shock as including the following elements:

- Strain, due to the effort required for psychological adaptation to the new culture;
- A sense of loss or deprivation in the absence of friends, possessions, profession and status;
- Rejecting, or being rejected by, members of the new culture;
- Confusion and uncertainty in terms of role, role expectations, values, feelings and self-identity;
- Surprise and anxiety, or even disgust and indignation as cultural differences become apparent, and
- Feelings of impotence caused by an inability to cope with the new environment.

Oberg's original article is brief and anecdotal. Most subsequent work in this field is descriptive, in which culture shock is seen as a stress reaction to an unfamiliar environment where psychological and physical rewards become uncertain, difficult to control, and difficult to predict (Weissman and Furnham 1987). Assignees consequently experience anxiety, confusion, apathy or anger until they have had time to develop new behavioural assumptions which enable them to predict the social behaviour of host nationals.

Nevertheless, there has been little attempt to explain for whom culture shock will be more or less intense, what determines the reaction that an individual is likely to experience, the duration of the period of shock, or what factors may reduce or exacerbate shock.

A smaller number of writers have emphasised the positive aspects of exposure to another culture, in which initial discomfort leads to personal growth through the adoption of new values, attitudes and behaviour patterns.

"In the encounter with another culture the individual gains new experiential knowledge by coming to understand the roots of his or her own ethnocentrism and by gaining new perspectives and outlooks on the nature of culture... Paradoxically, the more one is capable of experiencing new and different dimensions of human diversity, the more one learns of oneself" (Adler 1975: 22).

Change, learning, adaptation and adjustment are thus seen as important facets of exposure to a foreign culture, whether that exposure is viewed negatively as stressful shock, or positively as an opportunity for personal development.

International Adjustment

Research into international adjustment arose from claims of high failure rates, high failure costs, and organisational claims that failure is primarily caused by the failure of the assignee or partner to adjust to the foreign environment or

culture. Such research generally takes the generic literature on domestic transfers and work role adjustment as its starting point.

An international assignment, as a major change in job status or content, may be considered as a special case of work role transition (Black 1988). International transfers are frequently a source of stress (Mendenhall and Oddou 1985). Individuals transferred overseas enter new organisations (even if they are part of the same company) where work role expectations are often unfamiliar and ambiguous, and individuals are often uncertain of the consequences of familiar past behaviours applied in the new context, and not sure what behaviours would be appropriate for the new work situation. Such uncertainty and ambiguity also extends outside the work environment into the culture and environment of the host country itself.

Exposure to the cultural and environmental differences between the home and host countries, and the home and host workplaces, thus causes the assignee to experience the three primary components traditionally associated with stress (Cohen 1980): the *uncertainty* arising from situations that have uncertain outcomes, the *ambiguity* when expected or appropriate behaviour is unclear, and *helplessness* when individuals feel they have little control over their situation.

Black, Mendenhall and Oddou (1991) undertook a major review of the literature on both domestic and international adjustment to propose a model based on Brett's (1980) model, that is:

- individuals establish behavioural routines based on their perceptions of expectations, reward and punishment scenarios, and preferences for certain outcomes;
- once confronted with new and unfamiliar situations, established routines are broken and the individual's sense of control is reduced;
- individuals attempt to re-establish a sense of control by reducing the uncertainty in the new situation through predictive and/or behavioural control.

Empirical research (Black 1988; Black and Stephens 1989; Black and Gregersen 1991c) suggests that adjustment is a multifaceted concept and that at least three related but separable facets of adjustment exist:

- Adjustment to the work or to the job (which refers to the degree to which individuals feel psychological comfort about their new work role),
- Adjustment to interaction with host nationals (which refers to the degree to which expatriates feel psychological comfort in doing so), and
- Adjustment to the general host environment (being the degree to which newcomers feel satisfaction about how the country has arranged such matters as transportation, health care and housing).

Nevertheless, the literature tends to concentrate upon the adjustment that assignees must make in order to interact with host nationals and the host culture in which they are embedded.

Another adjustment mode, *withdrawal*, has been proposed in which individuals withdraw from the environment. In this mode, behaviour is in a direction that reduces the pressures from the new environment, and represents a removal from the adaptive arena.

A withdrawal mode is intrinsically included in the definition of adjustment by Berry et al. (1988: 63):

"Adjustment is the process by which individuals change their psychological characteristics, change the surrounding context, or change the amount of contact in order to achieve a better fit (outcome) with other features of the system in which they carry out their life".

The assignee's ability to withdraw into the expatriate community is described by Cohen (1977) who points out that the assignee bears a number of responsibilities: to his organisation as an employee, to his own country as ambassador, and to the host country as temporary citizen. These roles may place constraints upon behaviour leading to strain from which the assignee may seek to relax by withdrawing into the privacy of the expatriate environmental bubble. By this means, the minority expatriate community attempts to transform its ecological, institutional and social microenvironment in order to resolve its adjustment problems by minimising the degree of adjustment its members are asked to make.

Brewster and Pickard (1994) found evidence that the presence of a significant expatriate community provides a mechanism allowing assignees or their partners to withdraw from the host country culture. They propose that a significant expatriate community, by providing significant levels of support for the newly arrived partner, can act to isolate the partner from the host environment. This support and isolation allows the partner to "adjust" relatively easily, although the "adjustment" may be to the expatriate community rather than to the host country environment.

Based upon a general understanding that expatriate failure is both common and expensive, and that the most common reason for failure is the inability of the individual or spouse to adjust, researchers and practitioners investigated and suggested ways and means of selecting individuals more likely to succeed in an international assignment, together with ways and means to select and prepare those individuals in order to avoid or reduce failure and to enhance success.

"Culture-Tough" Destinations

Some overseas destinations are more popular than others: Miller and Cheng (1978) found that the geographical location of the host country can be an

important factor in influencing an individual's decision to accept or reject an overseas assignment.

Hofstede (1980) found that nationality affects cultural mores and business practices: these in turn affect appropriate managerial conduct, behaviours and employee effectiveness. Similarly, Smith (1992) found wide variations in management cultures and practices, leadership styles, group working practices and HRM policies across the different regions in which an MNC may operate.

To individuals from any given country, therefore, some destinations are more "culture-tough" than others. and the degree to which expatriates adjust to their overseas experience appears to be in part related to the country of assignment. The research literature indicates that Western expatriates find the cultures of some countries to be more difficult to adapt to than that of others. Mendenhall and Oddou (1986) cite the work of Torbiorn (1982) who found that expatriates expressed high levels of dissatisfaction with their overseas assignments to India or Pakistan, Southeast Asia, the Middle East, North Africa and Liberia in the areas of job satisfaction, levels of stress and pressure, health care, housing standards, entertainment, food and skill of co-workers. It is also important to note that some countries which emphasise a male-dominated value system may be "extra cultural tough" for Western women, whether they are assignees or the partners of male assignees.

On the other hand, it has also been argued that transfers to countries having cultures apparently little different from the assignee's home culture may have their own, particular problems (Suutari and Brewster 1998).

By definition, assignees are more inclined to accept assignments to "popular" destinations than to "unpopular" ones: perhaps the expectations of those who accept assignments to "unpopular" destinations may differ from the expectations of those assigned to more "popular" locations. Once on location, differing levels of "culture toughness", by making adjustment easier or harder, may lead to higher or lower levels of learning and achievement. This in turn may create differing levels of self-confidence and self-worth, and hence to differing job- and career-related expectations at return.

Finally, Gomez-Mejia & Balkin (1987) found that individuals returning from developed countries (e.g. Western Europe) tended to be more satisfied with the repatriation experience than those returning from developing countries.

Although this speculation is insufficient to indicate what differences may exist between the expectations of assignees destined for two given countries, or even two given geographical areas, it is sufficient to indicate that differences might exist.

Age and the ability to adjust

Acculturation and adaptation to other cultures is often negatively related to age (Alpander 1973): as a person grows older their set of values becomes stronger, more rigid and more resistant to the very change, adaptation and adjustment that is required in an international assignment. Thus Heller (1980) indicates that some corporations prefer to despatch younger individuals to foreign assignments in the belief that they are more capable of adjustment and flexibility, although other corporations prefer middle-aged people for their experience and maturity.

This does not necessarily imply some linear relationship between age and ease of adjustment, however: Feldman (1991) suggests it may be middle-aged, mid-career individuals who have the most difficulty making job transitions; they are neither young enough to have few family responsibilities and few established roots, nor old enough to be largely done with parenting

Selection Criteria for International Assignees

Zeira and Banai (1984) found that the four groups interested in selection criteria for expatriate managers (headquarters officials, expatriate managers, host-country employees and host-country stakeholders) all produce similar lists of desirable characteristics for expatriate managers. The four groups differ, however, in how they rank the desirability of those characteristics. Generalising, headquarters officials stress experience and adaptability, expatriate managers stress the ability of the partner to adjust, while host country employees and stakeholders stress proficiency in the host-country language.

They point out that most studies have treated headquarters officials and expatriate managers as a closed system in which the expatriate manager's characteristics must conform to the expectations of the officials who select them, and that the selection criteria are modified by the experience of expatriate managers. Such studies therefore ignore the very groups with whom the expatriate manager reacts while on assignment: the host-country employees, and the host country stakeholders. Yet it is this interaction that may determine the success or failure of the expatriate manager.

They argue that, while it is comparatively easy to continue studies within this closed-system framework, the high rate of failure of expatriate managers selected according to the expectations of organisations' headquarters officials indicates that such continued study cannot be justified. They argue that future study should take into account the open-system framework which encompasses host-country interests. They identify a number of difficulties inherent in such a requirement, but conclude:

"It is our belief that reliable selection studies will take place when organisations are ready for a major change in their selection philosophy, and when researchers insist that valid selection studies

be based on an open-system approach, using a variety of research tools, including phenomenological methodologies".

Torbiorn (1982) who examined the attitudes of 639 Swedish expatriate managers, found that the main criterion which predicts successful assignment overseas is the candidate's ability to adapt himself to the new culture (even if little is known about the general nature of "adaptability" as such). In addition to the ability to adapt, he stresses that, apart from the direct qualifications needed for the job, there are other important requirements: medical status, knowledge of the host-country language, motivation, family adaptability, personality, general background, level of education, social manners and the status attached to the job by host country nationals.

Mendenhall and Oddou (1985) reviewed the literature on selection criteria to state that a major problem area is the tendency of personnel directors, when selecting potential international assignees to use the "domestic equals overseas performance equation". The assumption behind this formula is that managing a company is a scientific art, and that the executive with a good track record in New York can perform just as well in Hong Kong. The effect of this practice is that little else is of importance in the selection process other than technical expertise and a successful domestic track record.

They conclude that the process of expatriate selection and training suffers from two basic interdependent problems: first, an inadequate understanding of the relevant variables of expatriate acculturation, which leads to the second problem which is the use of inappropriate selection and training methods.

They suggest a number of dimensions appropriate to the selection of international assignees indicative of a likely ability to adjust to and to function within the foreign culture and environment. They identify three sets of individuals cross-cultural skills as follows:

Self-efficacy skills - including reinforcement substitution, stress reduction and technical competence;

Relational skills - including relationship development, willingness to communicate, and language;

Perceptual skills - including understanding why host nationals behave and think in the way that they do and making correct inferences as to the motive behind those behaviours.

They conclude that acculturation is a multidimensional process rather than a one-dimensional phenomenon, and as a result selection procedures for international assignees should be changed from their present one-dimensional focus on technical competence as the primary criterion toward a multidimensional focus including cultural adaptation dimensions.

Over a decade later Forster and Johnsen (1996) interviewed 30 HRM or Personnel Managers with fifteen UK organisations, to find that almost all of the organisations regarded technical skills and previous domestic work record as

being, by far, the most important criteria when selecting individuals for international assignments.

Despite the volume of literature on the subject of selection for expatriation, little agreement has arisen on relevant criteria for selection, nor any agreement on the ranking of such criteria (Tung 1982; Ronen 1986). Little appears to have changed in the intervening years since Torbiorn (1982) wrote:

"Many thousands of words have been devoted to the subject of the ideal candidate for overseas assignments. The mass of possible selection criteria proposed in the literature is rarely likely to be matched by a wide range of available candidates and the man chosen is often simply the man who happened to be there."

Selection Methods for International Assignees

Brewster and Myers (1989) investigated the way that organisations selected individuals for international assignments. They found that a key role is often played by one or a small group of international personnel specialists at headquarters. It is their task to "know" present and potential expatriates as individuals. This includes much more than their career history and work situation. It involves close knowledge of their personality, style, likes and dislikes, hobbies and pastimes. It extends to knowledge of, and often acquaintanceship with, their family and friends. This aspect of the selection moderates all others.

They found selection interviews to be used by all the organisations that they approached, with informal interviews more common because the selection had, in effect, been reached prior to the interview. As they say, the vast majority of expatriates are 'selected' from within the organisation, not 'recruited'. Torbiorn's (1982) finding was similar.

Finally, they found very limited use of formal testing. Most organisations tend to draw conclusions from general psychological tests: for example, those taken on promotion into management. Only one company in their survey reported a specific cultural awareness or adaptability test.

Brewster and Harris (1998) found that interviews were usually conducted by a personnel specialist, with or without a line manager present, taking the form of a negotiation about whether the posting would be offered and accepted and what terms would apply. Interviewing the partner was rare, though it should be said that, via the personnel specialist, many of the organisations were in possession of very detailed knowledge of the whole family.

Brewster and Harris (Ibid.) developed a typology of international selection systems having two dimensions: openness and formality. In an "open" selection procedure all vacancies are advertised, and anyone with appropriate qualifications and experience may apply, while in a "closed" system selectors themselves choose or nominate candidates. Formal methods involve the assessment of candidates against formal criteria, while informal methods are

more likely to select individuals meeting the individual preferences of selectors.

They found that some individuals were selected for international assignment by a mechanism so informal that they called it "the coffee machine system". In this 'system' a line manager responsible for filling an overseas vacancy casually mentions the vacancy to a colleague (perhaps while queuing at the coffee machine), and the colleague as casually proposes a candidate known to him. The individual is approached informally to ensure that he (or she) is interested and, if so, is interviewed. This is not a selection interview in any formal sense, since the candidate has already been selected: it is more about negotiating the terms and conditions of the assignment.

They indicate that such closed, informal methods of selection, in which candidates are restricted to those known to the selector and his colleagues, are likely to take into account technical, specialist expertise as the primary consideration for selection, regardless of the importance of that attribute to the post under consideration. As a result, the ability of the organisation to take a strategic view of expatriation is severely limited: the line managers fill a position, the personnel department co-ordinates financial and physical aspects of the move, and the organisation continues to take reactive decisions about expatriation.

It seems likely, then, that an open, formal methodology will be more likely to consider the long-term strategic effects of the assignment upon the organisation and upon the individual, and to convey that strategy to the assignee. They suggest that international assignees chosen by more open, formal methods may, therefore, be more likely to have accurate expectations of the assignment and the effect upon them.

Training and Preparation for International Assignments

Cross-cultural training has long been advocated both as a means of facilitating adjustment to the expatriate environment, and of avoiding failure (Brislin 1981; Landis and Brislin 1983; Mendenhall and Oddou 1986; Tung 1987; Dowling and Welch 1988). One of the primary processes related to adjustment in general, and to international adjustment in particular, is that of reduction of uncertainty by learning what is acceptable, and by being able to act accordingly (Brislin 1981; Black 1988).

A useful definition of expatriate training is Rahim's (1993): *"an educational process for bringing about knowledge and attitudinal and behavioural changes in the expatriate managers and in his or her family ... so that expatriate managers can perform overseas operations effectively and efficiently"*, although there seems little reason to restrict this definition to managers.

A number of authors see realistic expectations (that is, expectations of the cultural and environmental factors that await the assignee in the assigned

country), brought about by adequate training and preparation, to be important (if not key) factors in the success of an overseas assignment (Torbiorn 1982).

The adjustment process may begin before the assignee even leaves the home country. To the extent that assignees can either imagine or simulate the new environment before actually entering it, they can utilise primarily predictive control to reduce both the uncertainty and the perceived loss of control in anticipation of the move. This "anticipatory" adjustment is primarily psychological and comprises the formation of expectations about the new situation and the behaviour that will be demanded of them. By creating expectations based on information held prior to actually entering the new culture, assignees can make both actual and anticipatory behaviour changes (Black and Gregersen 1991c; Black 1992). There is some evidence that three aspects of this anticipatory adjustment assist actual in-country adjustment: making a large number of mental adjustments in advance, targeting those adjustments at important aspects of the new culture, and refining the advance adjustments so that they are accurate (Black, Mendenhall and Oddou 1991).

It would seem reasonable to assume that appropriate pre-departure cross-cultural training could facilitate the formation of accurate expectations, leading to appropriate and advance adjustments, which in turn would assist in-country adjustment.

Indeed, although little is known about the training that is done, there is general agreement that training is closely correlated with expatriate skills and expatriate performance. Thus Tung (1982) argues that there is a clear correlation between lack of training and expatriate failure, and Earley (1987) concluded that the key element to preparing a person successfully for entry into a new culture is clarifying that person's expectations concerning the future culture relative to his or her home culture. Similarly Black and Mendenhall (1990), in reviewing 29 US empirical studies, found a positive relationship between training and adjustment, and a positive relationship between training and performance. They argued that a major cause of expatriate failure is directly attributable to the low quality and quantity of training that employees provide prior to foreign assignments.

Although there is a substantial literature, mainly from the United States, on the preparation of individuals for foreign assignments, much of this is anecdotal and prescriptive (Harris and Harris 1976; Rahim 1983). The research that has been done shows, primarily, that little preparation takes place: despite the general agreement that expatriate positions are important, that expatriation is expensive, and that extensive and costly 'running-in' periods may be necessary, it is still apparently the case that most organisations provide little or no formal training for expatriation. When Oddou (1991) surveyed 165 expatriates he found that 65% reported no training at all. Of the 35% who did receive training, only 26% believed the training helped them to perform well.

Information on training among European organisations is rather sparse. There is some evidence that European organisations are more likely to provide

training than their US counterparts: thus Torbiorn (1982) found more than half surveyed Swedish companies providing training, and Tung (1982) found training provided by about two-thirds of a general survey of European corporations.

There are some indications that international assignments are sometimes organised on such short notice that no time is available for training or, conversely, that the short time between selection and departure is indicative of low levels of training and preparation (Ondrack 1985; Doz and Prahalad 1986; Mendenhall and Oddou 1988).

Training by European organisations takes a number of forms (Brewster 1988), including informal briefings, 'look-see' visits by the assignee (and sometimes by the partner), overlapping of tours of duty allowing significant hand-over periods, language training where appropriate, and formal training courses which generally concentrate upon cultural and environmental differences between the home and host countries.

When Adams et al (1994) surveyed 205 in-post expatriate assignees, they reported the following:

- Over 70% of large company senior managers reported a serious lack of knowledge about the local business environment, and indicated a need for more pre-departure information about local business law and practices together with practical information about dealing with business partners and host nationals, and business etiquette;
- Preparation is at least as important for transfers to 'similar' cultures as for those more obviously different;
- Most assignees outside Western Europe in non-English-speaking locations reported no prior host language training, and identified this as a serious omission;
- First-time expatriates need more support on such practical issues as immigration, bureaucracy and safety.

There is evidence that international assignees themselves are very positive about the value of training programmes (Brewster and Pickard 1994). On the other hand, there is little evidence to indicate the effectiveness of training and preparation in general, and little evidence of that one type of preparation or training is more effective than another.

Kealey and Protheroe (1996) surveyed the literature on cross-cultural training for expatriates, and reached the following conclusions:

Most trainees are satisfied with the provision of **practical information** about living conditions and job realities, generally through country reports and meetings with host nationals and returned assignees. The literature does not often indicate whether such information is genuinely useful, or whether it has any ultimate impact on adaptation or performance. Feldman and Thomas (1992), however, in a study of 118

international assignees still on assignment, found evidence that realistic job previews, by providing assignees with more realistic expectations about their lives overseas, led to fewer problems of coping with and adjusting to the culture and environment in the host country;

Area studies emphasises the history, culture, social structure, economy and political behaviour of the host country, and may extend to the strategic goals of the sending and receiving organisations. They conclude that, while area studies probably assist individuals to better understand the host country, it does not equip them with personal and professional skills to work effectively in the host culture;

Culture awareness training aims to impart a more personally-relevant "feel" for the values, traditions and customs of the host culture, and aims at some degree of interpersonal skill development. They conclude that, although some studies provide some evidence that such training is effective, no study is based upon data about actual performance in dealing with genuine cross-cultural situations overseas;

Intercultural effectiveness skills training attempts to impart adaptation skills (to enable the individual, and perhaps the family, to cope with the stress of transition), cross-cultural communications skills required to build trust and understanding between people of differing cultures, and partnership skills which focus upon the professional need for exchange, joint decision-making and shared risk-taking. The authors conclude that there is no rigorous empirical evidence that such training enhances performance in an overseas assignment.

They conclude:

"The field of cross-cultural research and training is therefore in the uncomfortable position of having a product which is acutely needed but still of unproven efficacy. This survey ... suggests that the intercultural field has a challenge before it to establish most definitely whether intercultural training works, as well as to identify what kinds of training will work best in the varied and rapidly changing circumstances in which international collaboration takes place today". (Ibid:162)

Comment

This body of literature brings with it a number of problems. One has already been alluded to: the North American bias of the early literature, in which North American researchers and practitioners reported upon the experiences of North American organisations and assignees. The basis of this literature - that a very high proportion of international assignee "fail" and must be returned prematurely - is apparently not the case for European assignees, and at best unreliable even for North Americans.

Nevertheless, the perception of frequent and costly failure led numbers of researchers and practitioners to consider how living and working in a foreign culture and environment might impact the efficiency and effectiveness of international assignees.

The result has been a number of prescriptive solutions to the problem of "failure": the solutions may be summed up as "Select the right people, not only for the job, but also for the foreign culture and environment", and "Prepare international assignees for the foreign culture and environment before they leave their home country".

There seems nothing inherently wrong with these prescriptions: indeed, if we broaden the definition of "failures" to include those individuals who take unduly long to adjust, adapt and settle into the foreign environment, as well as those who remain on assignment despite working ineffectively or inefficiently in the foreign environment, then the prescriptions begin to appear eminently sensible.

Unfortunately, the literature tends to take us thus far, but little further. In the case of selection, there is little, if any empirical evidence to show that any particular selection method or selection criterion is associated with lower than usual rates of "failure", no matter how "failure" might be defined.

Similarly, a number of training and preparation practices and regimes are suggested. There is some limited evidence that training in general is associated with higher levels of international adjustment, and higher levels of overseas performance. However, given the wide range of formal and informal mechanisms that are available, it remains unclear which mechanisms are relatively effective and which relatively ineffective.

We are left with the notion that individuals expatriated by organisations taking particular care in the selection of their employees for expatriation, or taking care to train and prepare their international assignees for the forthcoming assignment, at least have the potential to experience higher levels of adjustment and performance than individuals expatriated by less careful organisations. But sensible as this notion sounds, it must continue to be considered speculative in the absence of further (and particularly empirical) research.

2.4 Repatriation

In the early literature on the repatriation of corporate assignees, researchers and practitioners tended to catalogue the problems encountered in repatriating an individual from host to home country after an international assignment, and to suggest solutions to those problems.

Problems for the Returning Assignee

European organisations report that repatriation can be as traumatic as the expatriation that preceded it, because of the problems encountered in readjustment to the home country and reabsorption into the home-based organisation (Tung 1988; Brewster 1989).

The early literature reported assignees commonly to be repatriated whether or not a suitable domestic job - or, indeed, any domestic job at all - was available at the time. Assignees returned in this way would be placed in a "holding pattern", which might contain no particular duties for the individual to perform, or might involve one or more temporary jobs until a more permanent placement could be made, or might require the returnee to seek a suitable job or position within the organisation. (Howard 1979; Harvey 1982).

Returned assignees reported their perception that important career and professional opportunities had passed them by while they were stationed abroad. It appeared that, while their domestic counterparts had been climbing the corporate ladder during their absence, they themselves had to resign themselves to a limited number of opportunities upon return - in short, that friends and colleagues who stayed were ahead of them for promotion (Labovitz 1977; Gomez-Mejia and Balkin 1987).

Returnees also reported that their problems were exacerbated by loss of political connections: the assignee who had been away for an extended period of years found himself a stranger both to his peers and to senior managers (Tung 1986). As a result, returnees might find their return being managed by corporate-level Human Resource personnel having little or no involvement with international staff in general, and little knowledge of the returnee's individual expertise and business knowledge in particular. Other returnees reported that promises made at the time of their selection were not honoured: promises made by individuals no longer with the organisation, by operating divisions that no longer existed, or by the international division without the support or knowledge of the domestic division to which the individual now returned (Dunbar and Katcher 1990).

Once allocated a job, returnees frequently reported the nature of the new domestic assignment to be disagreeable, offering lower levels of responsibility and autonomy than those enjoyed by the assignee as an expatriate (Murray 1973). Assignees who had been required to "go it alone" in a foreign country had become accustomed to a certain amount of independence and autonomy

and, as a result, reported the domestic assignment to be mundane and deficient in authority (Clague and Krupp 1978).

Similarly, returnees also reported the domestic assignment to have less prestige and status than their foreign assignment. In a foreign country they had felt part of an elite group with an important role to accomplish. In contrast, following their return, they simply felt like additional "faceless" employees working within a large administrative structure (Gomez-Mejia and Balkin 1987). In the British context, some returnees report that they have to cope with downward mobility, or even redundancy (Forster 1994; Johnston 1991).

Returnees reported that they had acquired skills and experience on their foreign assignment, but that these were neither recognised, understood, valued or utilised by the domestic organisation (Murray 1973; Adler 1981; Johnston 1991).

Adler (1981, 1986) found that international assignees reported their managerial skills to have been enhanced by the foreign assignment. These skills included working and managing across cultural boundaries, making decisions under ambiguous and uncertain conditions, being patient, asking the right questions (as opposed to knowing the right answers), seeing situations from a number of perspectives, tolerating ambiguity, and successfully working with a wide range of people. In addition, returned assignees frequently reported increased self-confidence and an improved self-image, possibly brought about by the increased levels of responsibility and autonomy that they had encountered overseas.

Adler (ibid.) pointing to the high correspondence between the skills reported to be acquired overseas and the skills generally associated with effective managerial performance, suggested that it might be in the best interest of the organisation to identify and use the acquired skill and experience. In practice, she found that exactly the opposite seemed to occur: the more returnees used the skills and knowledge that they acquired overseas, the less effective they were rated by colleagues. This apparently xenophobic response seemed to indicate that organisations were unable to value foreign work experience, and unable to integrate cross-cultural skills into the home organisation.

Finally, a number of studies indicated that returnees might face financial problems brought about by the difference between domestic and overseas compensation levels and the loss of overseas allowances. A common complaint among returnees was that the company failed to prepare them for the financial shock of coming home. Surprises included the higher cost of consumer goods, inflation, the reduced standard of living resulting from loss of extra benefits, and cash flow problems arising from the necessity to re-establish a domestic household. (Murray 1973; Howard 1974; Smith, L. 1975; Labovitz 1977; Clague and Krupp 1978; Howard 1980; Kendal 1981; Harvey 1982; Tung 1982; Harvey 1983, 1989).

Problems for the Organisation

The primary problems encountered by organisations required to re-establish and reintegrate a returnee from international assignment revolve around finding a mutually suitable job for their returnees (of similar status and responsibility to that held abroad) and dealing with the returnees' expectations on completion of the assignment (Brewster 1988; Forster 1994; Pickard and Brewster 1995).

In these circumstances, organisations cope with rather than solve the "repatriation" problem, frequently by employing 'ad-hoc' methods (Howard 1982; Brewster 1988): one study has pointed specifically to British organizations adopting an ad-hoc approach to the repatriation of their international assignees (Johnston 1991).

These ad-hoc approaches include one or more of the following techniques:

- Placing the returned assignee in a holding pattern;
- Delaying the return until a position can be found;
- Creating a position, if the returnee is considered extremely valuable to the company, for the sole purpose of retaining the individual within the organisation;
- Displacing a domestic employee to make room for the returnee (although this technique is employed only as a very last resort to accommodate a very talented returnee);
- Force-fitting the returnee into a position. If a meaningful job cannot be found or created, the organisation may offer the returnee any readily available job, whether or not the job matches the returnee's skills, experience, or professional or personal expectations. Returnees must make the best of the position, or forego any further claim on continued employment within the domestic organisation.

Organisations frequently state that one of their problems is dealing with returnees' "unreasonable" expectations. Black (1992) conjectures that this occurs as follows: almost by definition, entering a new environment means that a certain amount of uncertainty exists for the individual. People in general have a need to reduce this uncertainty, and one of the initial steps in doing so is to form expectations about the new situation. In the case of returning assignees, however, they have been "out of sight, out of mind" during their assignment, they are returning to a country and an organisation which has changed during their absence, and they have not kept up-to-date with those changes. Furthermore, they themselves have changed during their absence. It is only to be expected, therefore, that returning assignees will have inaccurate expectations of that return. Furthermore, those inaccurate expectations would, theoretically, be expected to play a central role in the repatriation adjustment process.

Expectation formation, however, appears to commence at the time that the individual is selected for the assignment. For first-time expatriates, at least, an overseas assignment is viewed as an opportunity to demonstrate technical competence in a wider arena, an opportunity for a general broadening of experience, and a necessary preparatory step for future moves into the top management positions of the organisation (Miller and Cheng 1976). Such positive expectations appear to form even in the absence of employee-employer discussion about the long-term implications of the assignment, or about the eventual return from that assignment.

Harvey (1982) indicates that the longer the assignee remains in the foreign country the greater the likelihood of problems on re-entry. Similarly, Tung (1988a) found that, in general, the longer the duration of the offshore assignment, the more difficult it is to reabsorb the individual, as:

- the “out of sight, out of mind” syndrome has had more time to take effect;
- longer absence provides more opportunity for organisational changes to make the individual's original position redundant or peripheral, and
- longer absence provides more opportunity for technological advances in the parent headquarters to render obsolete the individual's skills and knowledge.

Baughn (1992) found that the longer the duration of the assignment, the more that employees saw themselves as having developed new skills, knowledge and perspectives during the assignment. Similarly Seebert (1994) found that assignees rated themselves as being more effective the more time they spent on assignment, presumably reflecting their increased understanding and acceptance of the local culture as the assignment progressed.

Forster (1994) notes a number of reasons why reality and expectation may not match in the British context, particularly if the returnee has not been kept informed about changes at home:

- the home organisation may have undergone restructuring, streamlining or decentralisation, causing some jobs to become redundant;
- take-overs or mergers may have resulted in a 'clear-out' of senior management positions;
- the assignee's original job position or role may have changed radically or have been removed altogether during the sojourn abroad.

It seems logical that the longer individuals are away from their home country, the more change that can occur in the individual, in the organisation and in the home country. Assignees can (and do) make anticipatory adjustments prior to their return. Thus, to the extent that individuals can either imagine or simulate the home environment before actually re-entering it, they can utilise primarily predictive control to reduce both the uncertainty and perceived loss of control

in anticipation of the move, that is they can form expectations of how they will be expected to behave.

Black and Gregersen (1991c) suggest that older assignees might be expected to have acquired more information about their home country and home organisation, based upon their longer experience within those environments. In addition, older assignees might be expected to have observed and to have been involved with more change in those environments than younger assignees. They suggest that this experience, information and knowledge might serve to reduce the uncertainty associated with repatriation adjustment, with the implication that older returnees should have more accurate work- and career-related expectations.

Effects of unsuccessful repatriation.

The assignee who returns to the domestic organisation with high positive expectations, only to face the problems described above, and to be caught up in the organisation's ad-hoc reactions to those problems, is likely to become disappointed and demotivated. Overseas, the assignee was likely to have been in a fairly autonomous, professionally challenging position. On return, he or she becomes just another member of the organisation. The more outstanding the assignee's overseas performance has been, the more difficult they will find it to fit back into the domestic organisational climate (Harvey 1982).

Those assignees who recognise the value of the skills and experience that they have acquired on the foreign assignment may realise that they are more valuable to another (possibly competitor) organisation than they are to their own. Such assignees are likely to leave their current organisation for both motivational and monetary reasons, taking with them the skills and experience which have been acquired at considerable cost to their current employing organisation. Research in North America indicates that 20% of all managers who complete a foreign assignment wish to leave the company on return (Adler 1981) and 25% leave the company within one year of repatriation (Black 1989; O'Boyle 1989). Scullion (1995) indicates that turnover of this nature is also a problem for UK organisations.

Gregersen and Black (1995) summarised it thus:

"To compete effectively on a global scale, multinational firms need to develop executives with global perspectives and skills who can formulate and implement sound strategy. Firms often send managers on three to five year international assignments in order to develop their global strategy formulation and implementation knowledge and skills. ... Unfortunately, many firms invest more than one million U.S. dollars sending and supporting each expatriate overseas only to receive no long-term return on this financial investment when these 'globally competent executives'

return home but leave the parent firm to utilise their international skills elsewhere"

Domestic employees, witnessing the problems faced by returning assignees and the reactions of their organisation, are likely to resist internal recruitment for overseas positions themselves. This then frustrates the organisation's future efforts to recruit internally for foreign assignments (Scullion 1994).

From the organisation's point of view, therefore, mishandling an assignee's repatriation represents waste and inefficiency. Firstly, it represents the waste of skills and experience which, despite being obtained at high cost, are not recognised, or not utilised, or gifted to a competitor. Secondly, if sending domestic managers overseas is a critical component in the process of developing the organisation's increasingly necessary "global" vision and business perspective, then mishandling one repatriation only makes increasing internationalisation yet more difficult by dissuading observant, ambitious individuals from attempting future foreign assignments.

Proposed Solutions to Repatriation Problems

According to Harvey (1982) the goal of repatriation should be to bring back an overseas employee who will be a valuable addition to the domestic organisation. In order to do this, and so avoid many of the repatriation problems listed above, organisations are recommended to concentrate on solutions that incorporate "motivational" factors such as achievement, recognition, responsibility, and intrinsic interest in the work and the nature of the task, as opposed to "hygiene" factors such as pay and perks.

Frequently in the literature an author, having pointed out a problem encountered by a returnee or by the organisation, prescribes a solution to that problem - this is often couched in terms such as "The organisation should [do this]". It is considerably less usual for the efficacy of a prescribed solution to be measured.

Solutions that have been proposed to the problems encountered at repatriation include the following:

- **Plan and Communicate throughout the assignment.**

The most frequent prescriptive is that the organisation should plan the return, and begin that planning before the assignment begins (Adler 1986). The second popular prescriptive solution revolves around the provision of communication channels between organisation and assignee (Harvey 1982). Since a necessary precursor to planning is information-gathering through communication, and a necessary result of planning is information dissemination through communication, it seems reasonable to expect

“planning” and “communication” to coexist - indeed, one might expect communication to be an indicator of the presence of planning.

- **Assign responsibility.**

All too often, the responsibility for international employees is either non-existent, spread among several departments, or included in the personnel department's duties (Harvey 1982). Depending on the number of international personnel, one person or one department can better co-ordinate the domestic organisation's efforts to watch out for international employees' concerns. This single source will co-ordinate expatriate training programs, communicate changes in the domestic organisation to expatriates, and design a specific re-entry plan for the expatriate. This concentration of responsibility can be valuable in communicating the organisation's concern for its international employees and in reducing the ambivalence associated with repatriation.

- **Pay deliberate attention to the matter and manner of repatriation at the time of selection.**

Even if this is done only on a modest scale (e.g. no firm promises made) and only in broad-brush terms (e.g. major alternatives, but not specific positions), it will help foster a sense of continuity, both from the point of view of the individual and the organisation (Clague and Krupp 1978). This should include considering how the expatriate experiences of the assignee might be advantageously used for the organisation and for the assignee's career. The greater independence and autonomy frequently encountered in overseas assignments, for example, might qualify an individual for a larger supervisory and/or planning role back in the domestic company even if the individual returns to the same department or division.

Harvey (1982) suggests addressing the subject of repatriation prior to the departure of the assignee by communicating the specific objectives of the assignment (including both organisational and personal objectives), introducing expatriate mentor programs, and making the putative international assignee aware of potential repatriation problems.

On the assumption that one of the assignee's major concerns will be the effect of the assignment on their career path, this subject should be raised and discussed before the assignment begins. The discussion then becomes an opportunity for the organisation to ascertain how the individual views the assignment (for example, as a promotion or as a learning opportunity), to become aware of the individual's expectations of the assignment (for example, as an opportunity for career advancement) and, if necessary, to modify those expectations that appear to be inaccurate or inappropriate.

In this regard, Napier and Peterson (1991) found that it was unusual to discuss how the overseas assignment might fit into the individual's long-term career. It is interesting to note that international assignees appear to generate positive career-related expectations even in the absence of such employer-employee discussion. Adler (1981) found that assignees generally expect the

international assignment to benefit them professionally but tend eventually to discover that the international assignment has not enhanced their career as they expected. Similarly, Oddou (1991) found that 83% of expatriates (from a sample of 165) felt that they had been led to believe the international exposure would have a very positive effect upon their career, even though less than one third said that the firm had given any clear picture about their career path upon return. (In practice, he found, about one fifth were promoted upon return, and about one fifth were demoted. Nearly 40% returned to find that there was not even a specified position awaiting them).

- **Maintain links between assignee and domestic organisation during the expatriate assignment.**

In stressing this point the literature uses the phrase "out of sight, out of mind" to the point of cliché (Tung 1988b: 242, for example). The literature implies that, despite the brave talk about individual and corporate development through expatriation, the expatriate is ignored and forgotten until it is time to bring him home.

The "out of sight, out of mind" syndrome is often described as reinforcing the assertion that international assignments are more about solving an immediate problem than about corporate or individual development.

"International assignments are often a one way street. All too often a problem occurs, so the MNC hurriedly seeks out the best person to fill this immediate need. The chosen executive and family make the move overseas, and the MNC has solved its problem. The executive now falls into the category of 'out of sight, out of mind'. The MNC does not worry about this employee until the foreign assignment is over" (Harvey 1982: 53).

Harvey (1982) states that planning for the repatriation process should continue during the expatriation phase of the assignment, to provide a form of "security blanket" to the assignee. One of the first elements of this continuing planning process is the development of formal communication channels concerning re-entry. These communication channels operate in both directions, both to keep the organisation informed about the progress of their assignee, and to keep the assignee informed about changes in the domestic operation. Harvey contends that it is important for the assignee to know what is happening at the domestic level in order to continue feeling part of the organisation. Not only does this reduce the assignee's anxiety level while overseas, it makes readjustment to the domestic organisation easier.

When Baughn (1992) surveyed returnees he found that assignees who maintained higher levels of linkage with their domestic firm during the international assignment tended to experience greater levels of support and acceptance upon return, leading in turn to increased levels of assignee identification with, and emotional attachment to the organisation.

Harvey (1982) recommends **performance reviews** as an important method of linkage and excellent communication tool during this period. During the performance review, career paths can be reviewed and discussed, and changes made to the original objectives of the assignment, if necessary. The review can re-emphasise the purpose of the foreign assignment and what the assignee can expect on returning. By serving as a two-way communication tool, performance review can serve as a motivational factor in that the assignee's efforts can be recognised and rewarded.

The literature contains almost no information about how expatriates are evaluated while overseas (Tung 1984). What little there is indicates that rigorous appraisal systems are almost non-existent (Hays 1971; Misa and Fabricatore 1979; Baliga and Baker 1985; Gregersen, Hite and Black 1996). This is perhaps surprising given the high reported cost of expatriate failure and the growing tendency to see expatriates as key human assets (Adler and Bartholomew 1992).

Dowling and Schuler (1990) point out the difficulty inherent in appraising individuals on foreign assignments when a number of differences exist between home-based and expatriate personnel:

- the expatriate is working in a different, sometimes hostile environment;
- while the tasks that an expatriate performs may be basically similar to those in the home country, the structures which facilitate those tasks at home may be missing in the host country, or the expatriate may be required to develop such structures. Both the nature of the task and infrastructure may be modified by the environment;
- personality factors which might be of small import in the home environment may be of much greater importance in the host country. In particular dogmatism and authoritarianism may influence the expatriate's ability to adapt to new tasks in a new environment;
- appraisal criteria which are valid in the home organisation may be misleading in an international setting. Financial criteria may be meaningless due to currency exchange rate variations, MNC inter-subsidary pricing mechanisms, and differences in national accounting practices. The apparent financial success or failure of an MNC subsidiary may mask the opposite subsidiary contribution to overall organisational profitability;
- statistical data taken in isolation can be misleading. As an example, subsidiary worker productivity may be drastically below parent country norms, yet excellent by host-country standards.

Another recommended method of linkage is the periodic (usually annual) **return trip** back to the domestic organisation and environment, to allow the assignee to catch up at first hand with changes to the organisation and its management, to maintain personal relationships with domestic corporate staff, and to experience directly changes to the home country and the home

environment (Harvey 1982). Such visits are also an excellent opportunity for performance review.

One technique for maintaining links between assignee and organisation during the overseas sojourn is the appointment of a mentor (or 'career sponsor' or 'career manager') (Clague and Krupp 1978). The role of this manager is to look out for the career interests of the assignee throughout the overseas assignment and to ensure that adequate job opportunities exist at its end. This is not a full-time role, nor is it necessarily part of the personnel function: it might, for example, form part of the duties of the 'home' departmental or divisional head. The fact that this role exists, however, assures the individual that his interests are being taken into consideration by someone in the domestic company. In addition, it helps focus organisationally the company's interest that the assignee's experiences be used as meaningfully as possible following completion of the overseas assignment.

Harvey (1982) similarly recommends mentoring to provide the assignee with a personal link to the domestic organisation and a feeling of continuity with the domestic operation. He suggests that the mentor should be personally acquainted with the assignee and have foreign experience.

There is little or no empirical evidence of mentoring effectiveness for returning international assignees. Fagenson (1989) surveyed 246 domestic employees of a single U.S. based organisation, who were asked to indicate whether or not they had a mentor, described as "someone in a position of power who looks out for you, or gives you advice, or brings your accomplishments to the attention of other people who have power in the company". Mentored employees reported more career mobility, career opportunity, recognition, satisfaction and promotions than non-mentored individuals.

- **Begin repatriation planning well in advance.**

It is commonplace for the literature to recommend that detailed repatriation planning commence before the assignee leaves the foreign country; a period of six months is frequently put forward. Thus Clague and Krupp (1978) say that repatriation should be prepared for in much the same way as expatriation. Perhaps six months ahead of the proposed repatriation date agreed upon, alternative positions for the returnee should be systematically examined. Perhaps some informal orientation should be programmed, covering both changes in the corporate structure (and personalities) and in the country at large. This should help pave the way for the expatriate to move back with as little shock as possible.

Murray (1973) proposes a similar timescale for repatriation planning. The assignee should be notified at least six months or more ahead of his actual move back to the domestic organisation. This will allow him time to adjust to and prepare for the move home. It will also allow him (or his partner) to make an initial trip home in order to set up or purchase a residence. In addition, he can formally close off his end of the operation and turn the reins over to his new replacement. As the time for repatriation nears, increased communication

is necessary on such topics as the type of assignment the expatriate will be facing, and the corporate plans for his career.

Black (1991) also favours a 6-month planning period, during which time he recommends firms to look into what the employee expects in terms of a job position in the home organisation, and attempt to find a position to meet those expectations.

Forster (1994) recommends that returning assignees be given accurate and realistic job previews prior to moves, which can be achieved by using the six-month 'window' for an internal position search. When returning, the assignee should be offered adequate information, training or career counselling opportunities, and retraining opportunities if appropriate. It is important, he says, that the organisation be sensitive to the returning assignee's concerns and changing needs, and be willing to assist their repatriation and reabsorption, both in order to retain them and to encourage others to accept future international assignments.

- **Involvement of the line manager in return planning**

Dunbar and Katcher (1990) envisaged the return to the home base as a time when problems stored up since the time of selection begin to assert themselves. As was noted above, this may be exacerbated if returnees are managed by a "faceless" corporate-level Human Resource division, rather than by the division into which they are to be reintegrated and re-established.

One prescription to avoid or overcome such potential problems is to involve the individual's department line management in the return planning process, thereby providing the parties having most interest in the return - the individual assignee and the assignee's manager - with accurate expectations of what will follow. Torbiorn (1982) suggested that such man-management is just one responsibility of management in general, and that this responsibility should not be offloaded to a personnel department,

- **Provision of cross-cultural training.**

It is suggested that cross-cultural training (discussed in section 2.4.8 above) that assists the assignee and family to adjust to the foreign assignment affects the eventual repatriation by at least two mechanisms.

Firstly, training is presumed to enhance the assignee's job performance and avoid 'failure'. Thus cross-culturally trained assignees may return with higher levels of success and lower levels of failure, and consequently higher expectations of their return, more likely to be disappointed by an inept, lukewarm reception. The more outstanding the assignee's performance overseas, the more uncomfortable his return may be (Smith L. 1975).

Secondly, and by contrast, there is some evidence that factors facilitating expatriation adjustment may in turn inhibit repatriation adjustment (Black and Gregersen 1991c). Assignees who successfully adjust and adapt to the foreign

culture in their assigned country appear to require correspondingly greater readaptation and readjustment on their return.

- **Facilitate Readjustment**

One approach to the issue of repatriation is to consider the "readjustment" that individuals undergo when returning to their home base and home country to be similar to the "adjustment" that they underwent during their foreign assignment.

From a survey which examined the job performance, commitment to parent company, and intent to stay of 174 U.S. and 173 Japanese expatriates who had returned to their home-based organisations, Gregersen and Black (1995) recommend four actions that organisations can take to increase the likelihood of retaining their returned assignees:

Provide a promotion upon return. This is, they say, by the far the clearest action that an organisation can take, and the clearest signal that an organisation can send to reassure a returned assignee that both the individual and their skills are valued by and have a place in the organisation.

Engender commitment to the parent company after return. They suggest that commitment to the parent company is a key factor in retaining high-performing returning assignees, primarily because of commitment's strong relationship with intent to stay. Pointing to work by Gregersen (1992), they suggest two primary mechanisms by which commitment may be enhanced:

Provide returned assignees with a clear role or job. In general, they say, accepting and completing an international assignment requires a serious investment of time and energy from an assignee. This investment, however, carries career risks, and for many these risks are amplified and realised at the time of repatriation when many require several months to locate a permanent job in the parent company. Firms can reciprocate the assignee's investment in an international assignment by systematic planning for the returnee's job and thus produce a positive exchange relationship between the assignee and the firm.

Provide financial support after return. They point out that many returning assignees experience financial loss, given the necessity to re-establish a house and home. In addition, a significant proportion of returnees are unpleasantly surprised when they encounter the cost of living in the home country. They suggest that firms that provide adequate financial compensation communicate a high level of dependability and support, which tends to increase assignees' perceptions of a mutual investment, leading to higher levels of identification with the parent company.

By contrast, assignee's commitment decreases to firms that fail to provide adequate financial compensation.

Facilitate Repatriation Work Adjustment. Pointing to work by Black and Gregersen (1991a), they suggest three factors that organisations should consider when planning the returning assignee's job:

Role discretion. Greater role discretion (over what work gets done, by whom and how) allows returnees increased flexibility in utilising methods that they have mastered and which they believe will prove effective in the future, and in experimenting with new methods. Given that many assignees report high levels of autonomy while overseas, greater role discretion after their return eases psychological adjustment to work back home again. It seems probably that promotion upon return is particularly effective in engendering commitment and intent to stay precisely because of the higher role discretion available in higher positions. Thus, while an official promotion may not be possible, firms would be wise to place their returnees in positions having high levels of discretion, or to design in or allow greater discretion in an existing position.

Role Clarity. Returning assignees frequently report that they do not know to what job they are returning, and some do not have a defined job for several months after their return. Returnees report this lack of clarity as demoralising. It clearly points to lack of advance planning by the organisation, and returnees caught in such a 'holding pattern' are likely to perceive any investment in the foregoing international assignment as uniquely their own. Firms can therefore facilitate repatriation work adjustment, together with commitment to the parent company, by planning further in advance for the return of its assignees, and by making the jobs (and their content, objectives and limitations) clearer to returning assignees.

Nonwork issues. Black and Gregersen (1991a) found that nonwork issues such as housing and social status had a significant spillover effect on repatriation work adjustment. Given that firms often provide financial incentives to attract employees into international assignments, it may be that these very incentives lead to a decline in housing conditions and social status upon return, incurring a negative impact on repatriation work adjustment and job performance. While there may be little that companies can do about this, it may simply be the case (given that repatriation planning is frequently absent or poor) that this is not an issue that firms have examined thoroughly.

Foster a perception that international experience is valued. One final factor in Gregersen and Black's (1995) study that differentiated

those returned assignees who intended to stay with their firm was a perception that the firm valued international experience. Even if the newly acquired international skills and knowledge could not be utilised right away, simply discussing that experience, and how and when it might be utilised, served as an indication that the firm valued what had been gained overseas. In the absence of utilisation, or any discussion of possible future utilisation, returned assignees tended to assume that what they had gained was not valuable to the firm, but might be valuable to some other firm.

Gregersen and Black conclude that firms can help develop global competence in their employees by carefully crafting human resource policies to retain their best international assignees after they return home. By so doing, they can develop the strategic resources to effectively formulate and implement successful international strategies.

Comment

The overall impression that one receives from this literature is that it is driven by practitioners working with or within organisations. A number of problems are described. A number of solutions are prescribed. It is uncommon to find the problems (or their solutions) outlined within a theoretical framework, to find problems ranked in frequency or importance, or to find empirical evidence that a particular solution is effective, or more effective than some other solution.

When viewed as a whole, the problems appear to arise because the requirements of the organisation and the requirements of the returning international assignee do not coincide. Were they to do so, one suspects, the problems would disappear.

It feels intuitively right that, were an international assignment to be viewed by both the individual and the organisation as just one more learning opportunity within the individual's organisational tenure, then many of the "solutions" described above - planning, assigning and accepting responsibility, communication links, performance reviews - would fall naturally into place. On the other hand, if the individual's and organisation's perceptions of the assignment's long-term purpose are at odds, artificially applying those "solutions" would seem unlikely to affect the outcome. As long ago as 1980 Adler described this literature as follows: *"Most re-entry studies have focused on the problems inherent in the transition ... [and] the goal is to bring the returnee from a negative state "with problems" to a neutral state "without problems". The goal has not been to make the transition a learning experience, to maximise the benefit for the individual or for the organisation. The goal has been to maximise adjustment and minimise problems"*.

In short, this is an unsatisfying literature which leads one to question its foundations, and to treat its prescriptions as suspect. It is gradually becoming superseded by more recent literature on expatriation and repatriation brought into being by the commercial volatility and change experienced in the last few years of the 20th century.

2.5 Strategic International Human Resource Management

A growing body of literature describes the end of the 20th century as a time of rapid, all-encompassing change in which organisations' attempts to meet and counter international competition are leading to a reappraisal of the "psychological contract" between employee and employer.

Typical of these manifestations of change is the summary by Moran and Riesenberger (1994) which breaks the latter half of the century into three phases:

Phase 1, from 1945 to 1975, was characterised by high demand and high growth as the economies of the "free world" flourished and standards of living improved throughout the developed countries. Corporations focused their efforts on achieving economies of scale through mass production, with emphasis placed upon quantity and the efficient use of assets.

In **Phase 2**, from 1975 to 1985, the increased production capability built up since the second world war led to equilibrium or even surplus of supply in many industries. Competitive advantage began to shift from organisations capable of supplying quantity to those providing quality, with increased emphasis on low-cost production and the use of technological advances. As global economic growth began to slow, so governments began to provide incentives for global companies to invest in and trade with their countries.

Adler (1986) attributed globalisation of market competition and the internationalisation of business activity during this period to, inter alia:

- improved transportation and communication networks;
- an increased ability to transfer cash on a real-time, immediate basis;
- the growing availability of labour in developing countries, making it possible for companies to service the markets of the developed countries from production countries in the third world;
- the emergence of newly-industrialised countries on the Pacific rim;
- the emergence of Central and Eastern Europe from behind the former iron curtain;
- an increasing number of trading blocks, such as the EC and NAFTA, that encourage international trade and business activity. Hamill (1989) and Brewster and Scullion (1997) also note the increasing tendency for smaller to medium-sized companies to internationalise their operations within such trading blocks.

In **Phase 3**, from 1985 to the present and beyond, economic growth has been replaced by an era of volatility and constant change. Moran and Riesenberger describe the emergence of a new political and economic order by comparing and contrasting the business paradigm in place between 1945 to 1985 with the new business paradigm that continues to evolve into and beyond the millennium:

Table 2.2: Evolving business paradigms (after Moran and Riesenberger 1994)

Old Paradigm (to about 1985)	New (still emerging) paradigm
Governments focused on national barriers to entry.	Governments are developing "regionalisation" alliances (such as the EU).
Local technical standards acted as barriers to economy of scale	Homogenisation of technical standards favouring economies of scale
Telecommunications expensive and limited, favouring domestic firms	Globalisation encouraged by increasing availability of complex telecommunication at modest cost
Slow, expensive transport costs favoured local firms	Cheaper, faster transport mechanisms stimulate global commerce
Barriers to entry and isolation of markets favoured heterogeneous demand for products	Global exposure to products through commerce, travel, advertising and TV encourages a more homogenous demand for certain products
Competition remained largely local	Increasing global competition
Relatively stable, controlled exchange rates	Increasing exchange rate volatility due to global market demands
Technological research largely local	Increasing rate of technological change encourages firms to invest in research and development in multiple markets.

They conclude that all corporations, small, medium and large, are being affected by the shift to a market place characterised by ever-increasing global competition, and that corporations must learn to survive in a highly dynamic, unstable, global environment.

These changes in the international business environment have led to a number of changes in the nature of expatriation, viz.:

Internationalisation by smaller or newer organisations

In the increasing number of trading blocks throughout the world, and particularly in the European Union, the growth in expatriation is to be found in smaller or newer organisations entering the international arena

(Hamill 1989; Forster 1994; Brewster and Scullion 1997). The existing giant organisations generally associated with expatriation are often reducing their numbers of expatriates. To offset this, however, recent privatisation of large organisations has freed them to compete outside their country of origin. In addition, increasing numbers of smaller organisations are beginning to treat an entire trading block (such as the European Union) as a local market. Both these newcomers to expatriation necessarily have limited experience of internationalisation.

The larger, more traditional international players find themselves facing increasing international competition, and are becoming considerably more cost conscious. Expatriates are among the most expensive people in any organisation, and measurement of expatriate performance is uncertain (Brewster and Scullion 1997). With expatriates being viewed as an increasingly expensive resource, reorganisation of multinational corporations along product lines or business streams, a reduction in the size of headquarters' operations, and a reduction in the size of corporate international human resource management departments, many MNCs have lost the central expertise in the management of expatriates that they had built up over many years (Young 1993; Brewster and Scullion 1997).

Changes in host locations

At least for commercial organisations the proportion of expatriates being assigned from the developed to the developing world has decreased. In part this arises from the increasing unwillingness of developing countries to accept foreign expatriates, rather than have organisations train and employ host nationals. This in turn has led to a small increase in expatriates moving the other way, as subsidiary employees are assigned to headquarters for training and development purposes (Harvey 1997), and as developing countries begin to create their own international operations.

The greater part of change, however, arises from increased expatriation between developed nations. Extensive European and Japanese investments in the USA, cross-border developments within trading blocks (particularly within Europe), and substantial growth in the areas of international joint ventures, licensing and franchising have all led to an increase in the numbers of expatriates (Brewster and Scullion 1997).

Changes in the expatriates themselves

Changes in employing organisations, and changes in the drivers for expatriation have been contiguous with changes in the expatriates themselves. The traditional career expatriate, controlled from headquarters but devoting most of a working life to a series of posts overseas, is becoming less common (Tung 1988a). Expatriates

increasingly are educated to degree or MBA level, and will generally expect a single international assignment followed by a return home: occasionally they may undertake a second assignment later in their career. Consequently, expatriates are more likely to view a foreign assignment as part of a career, and expect to return to headquarters with increased skills and knowledge, in an improved position to negotiate the continuation of their career with their employing organisation (Brewster and Scullion 1997).

Expatriates continue to be predominantly male, although the numbers of female expatriates is increasing (Adler 1986; Scullion 1994; Harris 1995). Fewer partners, either male or female, are prepared to undertake the traditional "trailing" role - not working, but being expected to act as support for their expatriate partner, and frequently to act as social support for the organisation itself. Dual-career couples are increasingly prevalent, and partners are more likely to continue their own career, or to expect to work in their partner's assigned country (Dowling and Schuler 1990; Forster 1994).

One way that organisations have confronted increasing global competition and the availability of increasing sophisticated technology (particularly computers) has been by **downsizing**. Sahdev and Vinnicombe (1998) describe how downsizing is becoming a common and established technique to enhance efficiency and effectiveness, whereby 85% of Fortune 1000 companies reduced their workforces between 1987 and 1991.

They demonstrate that the rationale for downsizing is to yield economic benefits by reducing the employment costs that generally make up 30% to 80% of an organisations total costs. While negative growth has, in the past, been associated with failure and decline, downsizing can be a proactive strategy applied by thriving firms, or as a means of reviving declining organisations.

In practice, however, downsizing can have a significant impact upon the surviving workforce. Those activities and tasks that were necessary before downsizing remain must still be undertaken afterwards, but by a smaller workforce that may have been reduced by an over-simplified head-count approach (de Vries and Balazs, 1996). Employees may be asked to take on a wider range of tasks and responsibilities for which they have no formal training or practical experience while reluctant to train others when their own positions are (or are seen to be) under threat (Hamel & Prahalad 1994).

Following downsizing, employees are frequently expected to work at new tasks in a creative, flexible and innovative fashion, even though the work environment may be one of increasing alienation from management, work overload and job insecurity. As customers demand increasing levels of quality in goods and services, so the high personnel morale required to deliver that quality is eroded (Kettley 1995).

Goffee and Scase (1997) describe how organisational change has brought about a change in the **corporate career**. The expansion of large-scale business during the period of post-war growth created hierarchical organisations offering pay, promotion, security and visible status as incentives. Many employees were able to derive job satisfaction from personal progress (clearly measured by age, job title and hierarchical seniority) through clearly-defined career structures.

In such an environment, employees (and particularly managers) could be reasonably optimistic about possibilities for continuing career progression and steadily-improving living standards. Promotion and upwards movement through the hierarchy were clearly desirable, with promotion before others of similar age being a clear marker of success and achievement.

Recent restructuring and downsizing, accompanied by increased investment in and utilisation of technology has, however, created both "flatter" organisations having fewer hierarchical levels, and "looser" organisations in which clearly-defined hierarchies, procedures and rules have been replaced by decentralisation, flexible working methods, innovation, and smaller (often semi-autonomous) work units.

As a result, fewer are now able to pursue an orderly, predictable career path. The security implicit in steady career progression is being eroded as jobs are redesigned, relocated or abolished. Organisations are increasingly incentivising employees through performance-related payment schemes, with individuals being expected to create their own long-term career strategies.

As a result, even employees who remain within a single organisation for a considerable period of time are more likely to move from project to project, rewarded for each accomplishment more like professional consultants than like traditional employees, or else to develop and adopt novel ideas to the creation of opportunities within the organisation in the manner of entrepreneurs (Kanter 1983).

Alban-Metcalf and Nicholson (1984), in their study of career development in British managers, noted that managers were more concerned about the nature of their jobs than they were about the material rewards provided by the work or by the settings in which it took place. They noted an increase in mobility, with managers changing jobs and employers voluntarily with the aim of controlling and directing their own careers.

Stiles et al (1997) highlight how recently and swiftly these changes have taken place by comparing the "old" performance management paradigm of 1990 with the "new" paradigm of 1995 in an instructive table:

Table 2.3: Performance management changes (after Stiles et al 1997)

	1990	1995
Culture	Paternalism, authoritarianism, rigid hierarchy, strong tradition, bureaucratic	Strict measurement of performance. Continuous improvement.
Job security	Strong security, no history of redundancy programmes	Promise of job security for high performance
Objective setting	No formal link to organisational goals; targets set by managers aimed solely at financial objectives	Clearer link to corporate vision and strategy; targets set by manager and employee together; aimed at both financial, quality and people objectives
Performance	Annual appraisal; little on-going appraisal	Use of competencies to increase objectivity
Evaluation	Limited feedback. Unclear link to rewards	On-going appraisal. Promise of clear link to rewards and development
Rewards	Rewards tied to length of service and position. Across-the-board increases	Performance-related pay (at least in managerial grades)
Training and development	Training product focused. Organisation responsible for development	Training service focused with emphasis on continued improvement. Individual responsible for development. Promise of employability
Outcomes	Compliance, dependence	Individual and team accountability. Adaptability. Innovation.

Where the "external" career focuses on career paths, occupational streams and career stages within organisations, the "internal" career focuses on self-development, career motivation and career orientation (Sparrow & Hiltrop 1994). With increasing levels of competition, unemployment and redundancy in the 1970s and 1980s, Anglo-Saxon organisations at least began to withdraw from the promise of an external career, so that management of external careers by organisations became something of a fiction: a fiction that is increasingly permeating European organisations. As a result, the "internal" career is beginning to dominate managerial behaviour as individuals

necessarily take up responsibility for upgrading their own skills and competencies.

Increasingly, these changes are being described in terms of the **psychological contract**¹ between employer and employee. The concept of a "psychological contract", first discussed by Argyris (1960) and Levinson (1965), implies that there is an unwritten set of expectations operating between every individual of an organisation and the managers and other members of that organisation.

The individual's expectations tend to revolve around working hours, pay and benefits, guarantees that they will not be dismissed arbitrarily, opportunities for learning and growth, opportunities for feedback, workplaces that are fulfilling rather than demeaning, and a general respect for the individual's dignity and worth.

The organisation's expectations are frequently broader but less implicit: that the individual will enhance the organisation's image, remain loyal to the organisation, keep the organisation's secrets, demonstrate consistent work-related motivation, and to a greater or lesser extent be willing to sacrifice time and effort for the organisation that might otherwise be occupied by self and family.

Schein (1988) summarised the importance of the psychological contract thus:

"I would like to underline the importance of the psychological contract as a major variable of analysis. It is my central hypothesis that whether people work effectively, whether they generate commitment, loyalty and enthusiasm for the organisation and its goals, and whether they obtain satisfaction from their work depends to a large measure on two conditions:

(1) the degree to which their own expectations of what the organisation will provide for them and what they owe the organisation in return, matches what the organisation's expectations are of what it will give and get in return;

(2) the nature of what is actually to be exchanged (assuming there is some agreement) - money in exchange for time at work; social need satisfaction and security in exchange for hard work and loyalty; opportunities for self-actualisation and challenging work in exchange for high productivity, high quality work and creative effort

¹ Argyris (1960) defined **psychological contract** as "the perceptions of both parties to the employment relationship, organisation and individual, of the obligations implied in the relationship. Psychological contracting is the social process whereby these perceptions are arrived at". Rousseau (1990) considers psychological contracts to be "...promissory and reciprocal, offering a commitment to some behaviour on the part of the employee in return for some action on the part of the employer (usually payment)". Rousseau, however, considers that the contract exists only in the mind of the employee, and therefore has less to say about the nature of the contracting process.

in the service of organisational goals; or various combinations of these and other things".

Herriot (1998) echoes Schein by indicating that the psychological contract is perceived to be one of exchange embracing the promissory exchange of offers by the two parties, together with the mutual obligation to fulfil those offers.

In considering these assertions in the context of international assignments, a number of questions spring to mind. What is exchanged when an individual accepts an international assignment? What promises, implicit or explicit, are made by individual and by organisation? Are these promises capable of being met?

No straightforward answers to these questions appear to be readily forthcoming. Herriot (Ibid.) emphasises that different individuals will have different perceptions of their own psychological contract: the organisation will not contain a universal notion of what the current contract is. This comes about because:

- different people have different perceptions, even of the same terms and conditions;
- different people in the same organisation usually have different terms and conditions, and
- the psychological contract covers much more than the simple perception of terms and conditions but also embraces such topics as prospects for promotion and willingness to be mobile.

Psychological contracts are also likely to vary from country to country, and from culture to culture. Individual differences play a strong role in determining the internal career and choice of career paths, and effective career decisions are based on self-awareness, knowledge of occupations, readiness for effective decision-making and self-esteem (Derr & Laurent 1989). But national cultures shape the individual's self-definition of the internal career through fundamental ideas about self and work that the individual acquires from early experience in family and school.

It is only to be expected that, in an era of continuous change, psychological contracts, stated or unstated, between individuals and organisations should change too. With organisations unable or unwilling to guarantee the security of tenure enjoyed by a previous generation, other forms of security (or at least, other perceptions of security) have arisen to take their place.

Kanter (1989) describes how a form of security can be achieved through **employability**. Organisations may no longer be able to promise long-term employment security, but they are able to promise that today's work will enhance the individual's value in terms of future opportunities - if not with the current organisation then with another. Employability security thus comes from the chance to accumulate human capital - skills and reputation - that can be invested in new opportunities as and when they arise. In a continuously-

changing environment, those most likely to find and retain gainful employment are precisely those whose pool of intellectual capital or expertise is high.

Hand-in-hand with the concept of employability goes the notion that organisational employees must manage their own careers, because the organisation will no longer do so (if it ever did). Stickland (1996) offers employees three good reasons why they should take responsibility for their own **career management**:

- in an era of downsizing, continuous striving for improvement, continuous appraisal and payment for achievement, the organisational spotlight is on everybody, since everybody's contribution is important;
- only the individual can make long-term sense of the short-termism in organisational life characterised by the continual forming and disbanding focused teams, skill changing and job changing, and
- nobody else is going to do it.

He indicates that career self-managers are precisely the type of employee that modern organisations wish to recruit and retain. In today's business environment organisations require tough self-starters capable of absorbing heavy and demanding workloads, individuals willing to commit to the organisation and its goals, innovators who are comfortable with a constantly changing environment with a high degree of stress tolerance. Self-mangers, by their very nature, are more likely to welcome change or even chaos, finding them to be opportunities for career navigation, and building upon their own sense of career direction by working smarter rather than harder.

He indicates that one primary method that organisations can use to promote the idea of career self-management is to develop and propagate a suitable **strategy**. Isolated initiatives fail to take into account the broader organisational requirements that should be formulated at the top level of the organisation, framed in terms of a strategy statement, and published and disseminated throughout the organisation.

Lundy and Cowling (1996) describe how "strategy", deriving from its military roots in the art and generalship of war, comprises a number of key elements:

- leading the organisation with long-term scope and broad direction;
- positioning the organisation within its environment and in relation to its competitors;
- deploying resources effectively and efficiently;
- securing competitive advantage by taking a long-term perspective, and
- being successful in the environment specific to each organisation.

With increasing numbers of internationally-operating organisations and internationally-operating employees, so the subject of international human resource management (IHRM) becomes ever more important for more

organisations (Harris and Brewster 1999). There may be little or no agreement as to the scale and scope covered by the term "IHRM", but it certainly covers more than simply managing expatriates: it involves the world-wide management of people.

When that people management is based upon and aligned to the global organisation's strategies it may be termed **strategic international human resource management (SIHRM)**, defined by Schuler et (1993:720) as "

"human resource management issues, functions and policies and practices that result from the strategic activities of multinational enterprises and that impact on the international concerns and goals of those enterprises".

SIHRM and Expectations

The foregoing review has passed rapidly across a broad swathe of literature which is clearly at an early stage of development, while continuing to address a subject in a state of flux.

In determining the relevance of this literature to the expectations of returning international assignees, the remainder of this section will concentrate upon the increasing value of information to internationalising organisations. A key starting point for this development was Adler's study on re-entry (Adler 1980, 1981, 1991) which argued that the expatriate assignment develops those aspects of competence typically associated with success in managerial work, and that the learning function of the expatriate experience should be taken into account by the organisation at the time of return.

This literature review indicated earlier that organisational development may be one organisational purpose or motive for the use of expatriate assignments. There is growing understanding that an overseas assignment may include the transfer of information and technology as a strategic purpose (Black, Gregersen and Mendenhall 1992a; Bjorkman and Gertsen 1990; Brewster 1993). Human resource management, in putting that information to use, build new capabilities and qualities into an organisation's culture by endowing that culture with shared meanings and mindsets, relationships and networks (Evans and Doz 1992).

Guzzo (1996) discusses the acquisition of information through international assignment in some depth. He describes how human capital, including knowledge, skills, abilities and experiences, is created through experience and accomplishment. Organisations' competitive advantage is enhanced by the creation and retention of facts, insights, judgements, wisdom and know-how in the heads of their employees.

International assignments can allow individuals to develop unique perspectives on the firm's operations, markets and strategy by doing business first-hand in a foreign country. At the same time, individuals can develop international contacts and networks that would be difficult or impossible for the domestic

employee to uncover or cultivate. In more general terms, simply working in a foreign environment alongside host nationals can engender within the individual social skills, a more global (or at least a less parochial) mindset, and a certain flexibility of thought and a willingness to accept new ideas.

There is a trend, therefore, for the literature increasingly to view the motives and expectations of employer and employee as converging.. Tung (1998) points to increasing evidence that for many people the internal career appears to be taking precedence over the external career. She suggests that such people may attach a premium to one or more international assignments that provide skills contributing to a wide repertoire of core competencies. The majority of expatriates in her study viewed an overseas assignment as an opportunity to acquire skills, competencies and experience not usually available at home, supporting the idea of a linkage between overseas assignment and the enhancement of the "internal" career.

Earlier literature on expatriation and repatriation tended to see both employer and employee concerned with short-term outcomes: the organisation had a job to be done or a position to be filled, while the individual assignee was concerned with immediate financial reward or immediate promotion upon return.

More recent literature implies, however, that organisations are placing increasing emphasis upon more long-term strategic outcomes from an international assignment, particularly the acquisition and retention of knowledge. At the same time, individuals required to manage their own careers might be expected to seek out international assignments precisely for the knowledge and experience that will be valued, if not by their current employer, then by a competitor.

It may be the case, therefore, that the recent literature on expatriation and repatriation is implying that individuals returning from an international assignment will be more likely to have long-term expectations about the continued and enhanced employability that should accrue from the knowledge and experience that they have acquired, rather than expectations of immediate or short-term reward such as promotion, salary increases or status.

Peltonen (1998) summarises the recent change in emphasis as follows:

"Studies on expatriate behaviour stress the discontinuity involved in expatriate transition, whereas management development discourse sees the expatriate assignment as the prototype of an on-the-job learning experience required of all managerial candidates.

Of the two views, the latter has grown in importance lately. The focus is more on how to capitalise on the opportunities offered by the expatriate experience for human resources and organisational development than on minimising the adjustment and transfer problems".

Increased value of international experience.

In the intense environment of increased world-wide competition, much of the advantage one firm will have over another will be the knowledge the firm's decision-makers display about their particular global markets. Cultural knowledge is in part a by-product of the firm's valuable previous international experience that can generate a keen awareness of other countries' cultural, economic and political systems in order to develop appropriate business strategies. Of course, this awareness and knowledge are obtained through the personnel that are exposed to the decision-making environment of international and multinational operations (Oddou 1991).

Hence the successful implementation of global strategies depends, to a large extent, on the existence of an adequate supply of internationally experienced managers (Scullion 1992).

A study by Scullion (1992) identified shortages of international managers as a particularly acute problem for British MNCs. General shortages of international managers had become more acute over the past 5 years: two thirds said they had experienced shortages of international managers, and almost 70% indicated that future shortages were anticipated. These shortages came about precisely for the changes outlined above: the faster pace of internationalisation causing an increase in demand, and growing resistance to international mobility (partly caused by negative impressions caused by poor repatriations that they have witnessed) leading to a decrease in supply. 80% of firms felt that the main IHRM challenge was to secure an adequate supply of international managers.

Many British companies are responding to the shortage of international managers by attempting to identify high-potential managers at an earlier stage in their career and giving them international experience at a much younger age. Over one third of the companies said that they were sending young managers on international assignments partly for development purposes. This is in sharp contrast to the previous practice of relying upon a cadre of career expatriates (Scullion 1992). This trend towards giving younger managers the opportunity for international experience earlier in their careers is part of a more general trend to give this kind of experience to many levels of managers. Increasing numbers of international firms are using short term developmental assignments in order to develop larger pools of employees with international experience (Dowling and Schuler 1990; Oddou and Derr 1992).

Scullion suggests, therefore, that the most formidable task facing many British MNCs is the recruitment, development and retention of a cadre of managers and executives who understand and can operate effectively in the global market environment.

There is some evidence that North American MNCs have been reducing their numbers of parent-country nationals by appointing host-country nationals in their stead - primarily because of the reported difficulties experienced by their American employees in adjusting to other cultures and environments (Harris

and Moran 1987; Kobrin 1988; Scullion 1991). There has been some suggestion that this strategy could impede North American MNCs from implementing a global strategy, creating problems in controlling subsidiaries, and preclude North American individuals from gaining the very international experience which is gaining value today (Kobrin 1988).

This has given rise to a view that European MNCs, rather than devise an international strategy uncritically around unmodified North American findings and concepts, should create their own European approach to international human resource management (Brewster and Burnois 1991; Mayrhofer 1992) based upon the ethnocentricity that allows both centralised control of large organizations and the acquisition of international experience and a global viewpoint.

Comment

Recent literature on expatriation and repatriation is, like the organisations and individuals that it addresses, attempting to come to terms with the continuous change that we are all experiencing as the 20th century draws to a close, driven by increasing levels of global competition, and fuelled by ever more prevalent technology.

This literature differs in two important ways from earlier literature on expatriation and repatriation.

Firstly (and possibly because it is currently tracking a moving target), this literature is placed on a theoretical footing to a considerably greater extent than was the case earlier. In examining expatriation and repatriation within the framework of the psychological contract (which in turn derives from established theoretical work on expectation and motivation), contributors to this later literature are enabling researchers and academics to consider expatriation and repatriation as part of a wider whole, rather than as peripheral curiosities.

Secondly, the tenure of this more recent literature tends to consider organisation and assignee as co-operators having mutually-beneficial aims and purposes, rather than competitors acting at cross-purposes.

Although this later literature is clearly at a very early stage, it already offers a number of insights into the contemporary nature of expatriation and repatriation. As befits a young literature, however, these insights are currently of a broad-brush, generalist nature. The earlier literature, for all its flaws, still remains a useful source for the evaluation of the myriad factors that can affect the complicated, multi-faceted process involved in the expatriation of organisational employees to international assignments and their subsequent repatriation.

2.6 Limitations of the literature.

The preceding review uncovers a number of shortcomings in the literature on expatriation and repatriation, and some have been pointed out in situ. To summarise:

2.6.1 American Bias

Most literature on management in general is North American, in which North American researchers have observed the behaviour of North Americans in US based organisations. Models and theories have then been developed upon these observations. There has been an implicit assumption that these models and theories could be applied universally.

Adler (1986) pointed out that US corporate activity has internationalised faster than has the publishing of articles on international management. In her study, Adler reviewed over 11,000 articles published in 24 management journals between 1971 and 1980. She found that 80% were studies of US practices conducted by North Americans. Less than 5% of articles describing behaviour in organisations included the concept of culture. Less than 1% focused on the work interaction of people from two or more cultures, a crucial area for international business.

What literature exists on the more particular subject of expatriates and expatriation retains the North American bias. In addition, much of the work is exploratory, and there is little empirical data.

We cannot necessarily assume that American findings can be applied globally (Scullion 1992). In particular, we cannot assume that American findings are applicable in a British context. Nevertheless, given the almost complete dearth of empirical evidence concerning the international management of human resources within British organisations, there is often little option but to make such an assumption in the absence of either confirming or disconfirming evidence (Hamill 1989).

2.6.2 Fragmentary Focus

Research frequently concentrates upon one particular phase of an expatriate assignment (selection, training, expatriation and sojourn, repatriation and return) or upon one single aspect or factor of an assignment (such as selection criteria, or "success").

Generally, research into expatriation has concentrated on a small number of considerations, in particular:

- the difficulties that expatriates experience in adapting to host country environments and cultures, leading to early return from assignment or failure to work effectively during the assignment;
- the role of the selection process in choosing expatriates more likely to adapt to foreign cultures, and thus less likely to "fail" on assignment;
- the role of pre-departure training, particularly cross-cultural training, in assisting adaptation and thus reducing "failure" on assignment;
- expatriation compensation packages;
- the problems experienced by both organisations and expatriates during repatriation.

It is therefore rare for the literature to treat expatriation heuristically, as a long-term multi-phase process with a duration measured in years.

2.6.3 . Dearth of empirical data

A significant proportion of studies to date comprise surveys which draw attention to the issues involved but do not explore possible underlying relationships. Consequently most empirical studies do not have a theoretical underpinning (Black, Mendenhall and Oddou 1991).

Several researchers have pointed to a need to build on existing literature rather than replicating what is already known (Dowling 1986).

In his overview of research issues in the field of human resource management, Forster (1994) suggests that researchers need to:

- adopt a wide range of empirically-based strategies which, even if informed by a concern for practical issues, are analytical and independent rather than shaped by corporate agendas;
- undertake systematic identification of variables associated with international human resource management;
- carry out detailed and systematic surveys and case study research to elucidate organisational operations in practice;
- reduce the overwhelming concentration in the literature on US and Japanese companies.

This study aims to take into account the deficiencies of the literature in general, the paucity of knowledge about the expectations of returning international assignees in particular, and the suggestions of researchers such as Forster in an attempt to increase our knowledge and understanding.

Chapter Three

Research Questions

Chapter Three Research Questions

3.1 Preamble

This chapter describes the manner in which the research questions were derived for this study.

3.2 Preliminary Research

3.2.1 Literature Summary.

A very brief diagrammatic summary of the literature on repatriation appears as Figure 3.1 overleaf.

The diagram reveals an interesting inconsistency. Individual assignees and their employing organisations both report international assignments as opportunities for individual and corporate development. This stands in contrast to the reported outcomes of international assignments, characterised by lack of planning, disappointment, inefficiency, ineffectiveness and waste.

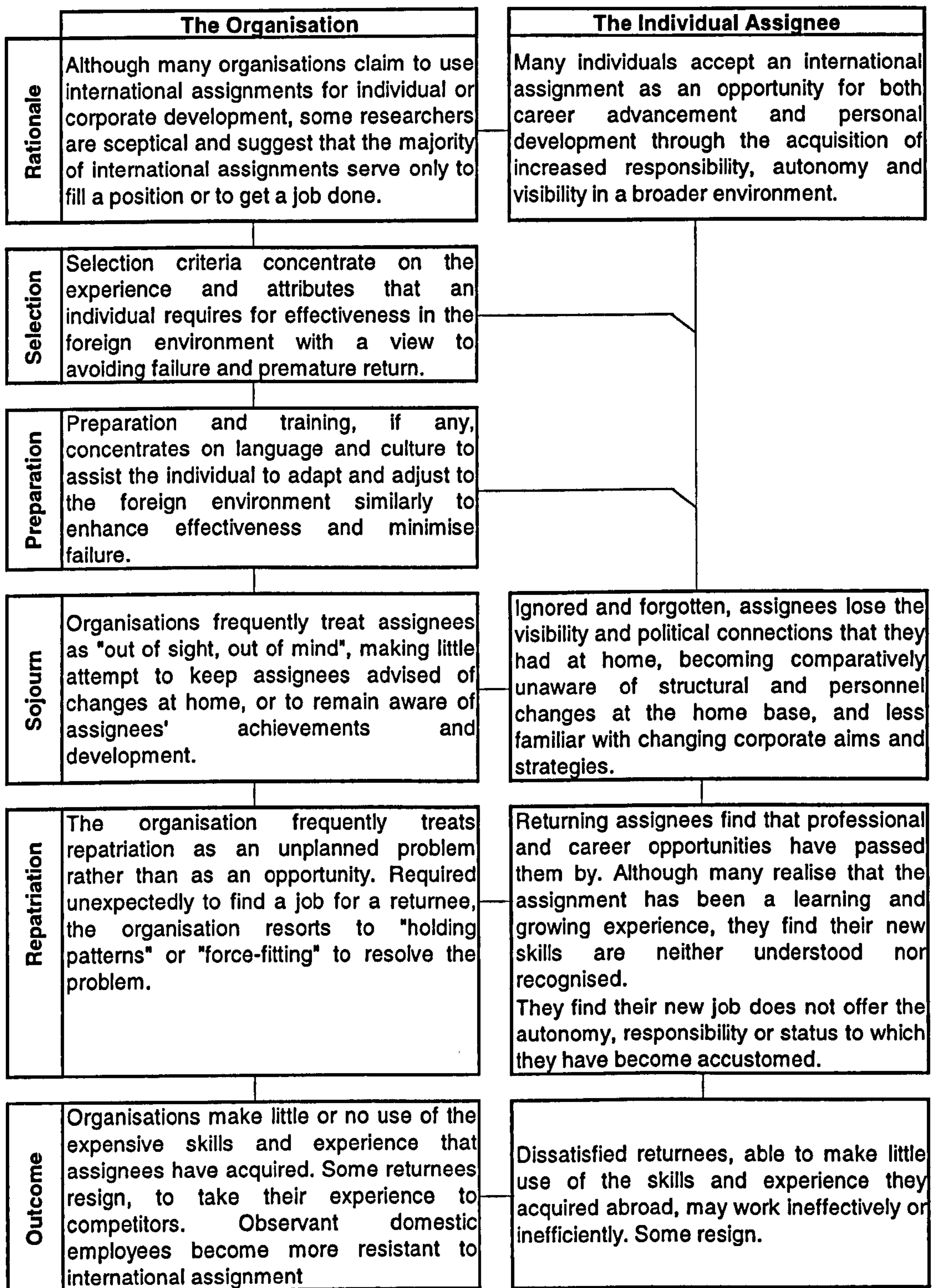
Such inconsistency seemed worthy of research. I was conscious, however, of the American bias of the literature, and researchers' warnings that the American experience would not necessarily be replicated in other countries and cultures. The literature points to the possibility that management methods and techniques, as well as individual cognitions and reactions are likely to be culture-bound, and casts doubt upon the North American experience being universal.

3.2.2 The rationale for preliminary research.

I had already decided that my own research would take place in a British environment. Although I felt intuitively that the American and British experiences were likely to be broadly similar, I was aware that significant divergence between the two might render questions (and their answers) formulated upon American findings irrelevant or misleading in a British context. It proved difficult, therefore, to formulate a research question based upon previous research described in the literature when that very literature cast doubts about its veracity in my chosen environment.

In order to overcome this quandary and as a preliminary to further research, I decided to make a broad assessment as to the general applicability of the North American literature to British organisations and their employees.

Figure 3.1 Repatriation: a very brief summary of the literature



Clearly, a comparison of British and North American organisational expatriation and repatriation practices and outcomes would be a significant study in its own right - and this was not it. The assessment would be used simply to assist me in the formulation of research questions, and in particular to provide me with some confidence that those research questions were relevant in a British context.

3.2.3 Preliminary Research Design

The following chapter describes in some detail the research methods which are available to the researcher, and their general strengths, weaknesses, advantages and disadvantages.

I was interested in quickly obtaining a broad picture of expatriation and repatriation within British employers of British assignees. I decided that organisational managers and directors directly involved with the management of the expatriation/repatriation process would be capable of painting such a broad-brush picture. I decided to interview such managers and directors, asking mainly open-ended questions within semi-structured interviews, in order to elicit the necessary information.

A number of key questions were required in order to extract information about each stage of the expatriation-repatriation process:

Rationale:

"Why does your company use international assignees ?"

Selection:

"What are the key criteria for their selection ?"

Training:

"What preparation and training do you provide ?"

Sojourn:

"Is there a policy for keeping assignees informed about personnel, structural or policy changes within the company ?"

"How are assignees appraised ?"

Repatriation:

"Is there some strategy or policy involved in repatriation, or is each case treated individually?"

"Are returnees debriefed?"

"What problems do you face when placing returnees?"

"What do you believe to be the main problems that face the returnees themselves?"

Outcome:

"What value does the company place on international experience?"

Do returnees resign?"

Each interview would be conducted such that these key questions would be asked at some point during the interview (unless addressed unprompted by the interviewee), and pursued to whatever depth seemed appropriate and relevant at the time. The interviewer would be free to ask additional, discretionary questions to start and end the interview in a logical manner, to frame the key questions, or to assist the interviewee to place the key questions in perspective within their organisation.

3.2.4 Organisation selection

I intended to interview Human Resource managers within significant British expatriate-employing organisations having sufficient status to understand (or better yet, to influence) their organisations' expatriate policies and strategies, the problems encountered by both organisation and assignee, measures taken to overcome those problems, and the outcomes of those measures.

I was conscious, however, that senior managers in significant organisations have numerous calls upon their time, and that the first hurdle that I had to face was the difficulty of access to suitable interviewees. To quote Martin (1986),

"The first and perhaps the greatest difficulty in senior managerial interviewing lies in gaining access to target subjects within a reasonable timescale, and at a reasonable cost. Top managers, especially in large organisations, are notoriously hard to get at and the would-be interviewer will need to employ a careful stratagem if he or she is to be successful."

Martin goes on to point out two major reasons why this should be so. First of all, senior managers' time is regarded as a premium commodity, not only by themselves but also by their secretaries, aides and subordinates. Secondly,

access to senior staff in any organisation reflects upon the status of subordinates and may have profound effects upon their own promotion prospects. Subordinates may not always be enthusiastic about creating access opportunities for unknown researchers.

The immediate problems in attempting access to suitable interviewees were therefore threefold: firstly, to identify organisations that sent British employees on international assignments; secondly to identify suitable senior Human Resource managers within those organisations; and thirdly to persuade those managers to be interviewed.

My association with the Centre for International Briefing at Farnham Castle ("CIB") is described in section 4.4.1.1 below. This association provided a valuable shortcut through these problems in all respects. Firstly, the CIB were able to identify organisations that sent employees on pre-assignment international briefings. Secondly, the CIB could identify senior Human Resource managers within those organisations with whom they had had dealings in the past. Finally, when I approached those managers to request an interview, our mutual knowledge of and continued association with the CIB proved to be a valuable attention-getting opening gambit.

I proceeded as follows for each potential interviewee:

- Telephoned the organisation's central switchboard to confirm the potential interviewee's name and title, and to determine the appropriate secretary's name and telephone number;
- Made a direct approach by letter, addressed to the potential interviewee by name and title, requesting an interview. (The full text of a specimen letter appears in Appendix A);
- About 7 days later, telephoned the secretary to confirm receipt of the letter, and attempted (in order of preference) to make an appointment for interview, speak directly to the potential interviewee, or arrange a date and time for a subsequent telephone conversation.

These tactics led to fourteen interviews from fifteen approaches, which result I considered to be more than satisfactory.

I was anxious that interviewees provide frank and candid answers to my questions, even where those answers might be construed as portraying their organisation negatively. Accordingly, I advised each interviewee that no information would be published that would allow their organisation to be recognised.

The fourteen companies represented a broad spectrum of sizes and types, as follows:

Company "A":	Accountancy
Company "B":	Pharmaceuticals
Company "C":	Insurance
Company "D":	Petroleum
Company "E":	Chemicals
Company "F":	Manufacturing
Company "G":	Manufacturing
Company "H":	Petroleum
Company "I":	Services
Company "J":	Energy
Company "K":	Banking
Company "L":	Technology
Company "M":	Transport
Company "N":	Telecommunications.

3.2.5 Recording and transcription

Each interview was (with the interviewee's permission) recorded onto tape. Miniature tape recorders, designed primarily for dictation on the move, but eminently suitable for recording a conversation between two people in a quiet office environment, are now available quite cheaply. They can record 30 minutes of conversation at a time. The shortest interview lasted for about 20 minutes, most occupied about 40 minutes, while the longest lasted over an hour. Thus most interviews required a tape cassette change, and some required two.

Interviews were transcribed from tape as soon as possible after the event, usually that same day. I found this to be a long, tedious business, requiring much rewinding and replaying of tape. Working alone, it proved to be more efficient to transcribe initially with pen and paper (since one hand was constantly busy manipulating the tape player), requiring the interview to be typed into a word processor at a second stage. The transcription process proved considerably more efficient if an assistant was involved: one person could then type directly into the word processor, while the other, looking over the typist's shoulder, continually rewound and replayed the tape until each sentence had been successfully transcribed.

3.2.6 Responses

I read the interview transcripts several times to get a general sense for commonalities. I then subjected the interviews to simple content analysis by noting each type of response to each question, and accumulating tally marks as each interview contained an identical or similar response. Responses

forthcoming from less than three interviews were removed from the resulting tabulation.

The results are shown in Fig. 3.2 overleaf, and summarised here:

Rationale: my interviewees indicated that international assignments were used both for immediate needs (e.g. to fill a position or to cover lack of host-country expertise) and for long-term development;

Selection: the primary selection criteria for international assignments are concerned with the job itself, language ability, and ability to adjust to the host environment;

Training: preparation and training is primarily concerned with assisting the assignee to function within and adapt to the host environment and culture;

Sojourn: organisations are more concerned with appraising their assignees than with keeping assignees advised about changes at home;

Repatriation: almost no organisations have a repatriation policy or strategy, there is little repatriation planning, and few returnees are debriefed;

The primary problem facing organisations is simply finding a job for the returnee. The primary problem facing returnees themselves is their own unduly high expectations;

Outcome: many organisations claim to place considerable value on international experience. Although most organisations see some returnees resign, this is rarely frequently enough to impact the organisation.

Figure 3.2 Summary of responses from preliminary interviews

Topic	Numbers of interviewees providing this response
Why does your company use international assignees ?	
Lack of expertise in host country	12
Career development	12
Business need (to fill a position)	7
Corporate development	5
Control	5
Representation	3
Management of take-overs	3
The organisation faces occasional difficulty in recruiting for international assignments	9
What are the key criteria for their selection ?	
Technical expertise - ability to do the job	14
Adaptability	6
Management skills	4
What training and preparation do you provide ?	
Language	13
Cultural	12
Pre-assignment visits to host country	6
Meetings with returnees	4
Is there a policy for keeping assignees advised ?	
An appraisal mechanism is in place	13
Assignees are advised about structural changes	9
Newsletter(s) are provided	7
Assignees are advised about personnel changes	4
Mentors keep in contact with assignees	4
Assignees are kept advised about job vacancies	3
Is there a repatriation policy or strategy ?	
A repatriation policy or strategy is in place	2
Repatriation is planned for all returnees	3
Repatriation is planned only for selected high flyers	3
There is little or no planning of repatriation	8
Repatriates are debriefed	4
What problems do you face when placing returnees ?	
Finding them a job	9
The organisation is shrinking	7
What are the main problems for returnees themselves ?	
Expectations higher than can be delivered	9
Adjusting to the UK	7
Loss of responsibility or autonomy	6
Loss of income	5
What value is placed on international experience ?	
Considerable	9
A necessary precursor to middle or senior management	6
None, or very little	4
Do returnees resign ?	
Never, or rarely	3
Not frequently enough to impact the organisation	8
Sometimes	3

3.2.7 Conclusions

These responses are in broad agreement with the mainly North American literature (briefly summarised in Figure 3.1), and show very similar inconsistencies. In both cases, organisations claim that international assignments fulfil both immediate needs and long term organisational and individual development requirements, and claim that international experience is valued within the organisation. Yet selection and training concentrate exclusively upon the immediate assignment, little repatriation planning takes place, returnees are not debriefed, and the primary problem facing organisations is simply that of finding a job for the returnee.

I took this general agreement between the North American literature and the responses to my own interviews of British organisations as enabling me to consider the literature to be generally applicable in a British context, and enabling me to undertake further research based upon that literature.

3.2.8 The expectations of returning international assignees.

Although the interviews had fulfilled their primary purpose, I was intrigued to see that nine of the fourteen interviewees had cited the main problem facing individual returnees themselves to be expectations higher than could be delivered by the organisation. I checked through the transcripts to confirm that each such response had been unprompted by the interviewer: indeed, no interviewer referred to "expectations" at any time during any interview.

Some interviewees expanded upon this theme:

Company "A": 'Some returnees resign. I suppose it is inevitable. If they resign within, say, two years, it is mainly because the job they come back to hasn't lived up to their expectations.'

Company "B": 'When you are going out you expect it to be different, and when you come back you expect it to be the same as when you left. People often find it a shock that their job is different from their expectations. Occasionally, if their expectations have not been met they will resign because they are not satisfied with the job offered to them. I think that most companies find expatriates returning with higher expectations than can be accommodated.'

Company "E": 'Many people think that when they have been away for two years they can come back and slot into where they were before. Yet when they do return it is not as wonderful as they thought. We tend to think that returning is the easy bit, but it is often more difficult than going out. Individuals are prepared for problems on secondment, but don't expect them when they come back.'

Company "F": 'International experience can sometimes make you dissatisfied with what you come back to, because you have become

used to being a big fish, and forget that you will return to being a small cog in a big wheel'.

Company "G": 'Many do not find it easy to settle back, and a lot of it is dissatisfaction with pay and conditions. People have been a big fish in a small pond, and they come here and, even if they are quite senior they are small fish again, and that is difficult. Everybody expects to come back and be promoted and that is not always possible. Sometimes their expectations become higher than what can be delivered and it can go catastrophically wrong. We recently did a survey and found that half of them are not happy with the job on return'.

Company "I": 'Returnees often have an unrealistic idea of the environment to which they are returning, the job situation, and the money that they can expect'.

Company "M": 'Many returnees have a vision of themselves as being far more important to the company than they actually are'.

The unexpected emphasis that many interviewees placed upon the expectations of individual returnees caused me to revisit the literature on expatriation and repatriation in terms of the expectations of individual international assignees.

3.3. "Expectation": The literature revisited

The literature review in Chapter 2 above indicated that organisations frequently state one of the problems they face to be the "unreasonable expectations" of returning international assignees (see page 79). (It is interesting to note that the organisations I interviewed tended to report the same problem, although describing "expectations higher than can be delivered" to be a problem belonging to the individual rather than to the organisation).

These expectations are expressed at the time that the individual returns to the home organisation at the completion of an international assignment. The literature on expatriation and repatriation, however, describes these expectations variously as:

- formed at the time of selection, motivating the individual to accept the international assignment, or
- formed by the overseas experience, but inaccurate because of isolation brought about by being 'out of sight, out of mind', or
- formed prior to return, as anticipatory adjustment to the uncertainty of return.
- being derived from the unique, unwritten psychological contract that each individual perceives to exist between employer and employee.

The literature indicates that individuals report a number of motives for accepting international assignments; some, like "wanderlust" or "immediate financial reward" have few long-term implications. Motives such as "career advancement", "learning" and "development", however, seem to indicate that the individual has a longer time scale in mind, and expects them to come to fruition after the international assignment is completed (see pages 53 to 55). Individuals frequently appear to derive these motives whether or not they discuss the purpose of the assignment or its long-term implications with their employing organisation: for this reason, it is suggested that organisations should take steps to understand and modify those motives at the time of selection (see page 83).

The literature also indicates that the assignee creates expectations of return based upon the experience of the overseas sojourn, but taking on additional responsibility and autonomy, acquiring new skills and experience, and becoming accustomed to being a "big fish in a small pond" (see page 78). The literature indicates that expectations of this nature may grow unchecked by feedback from the home-based organisation because the assignee is isolated abroad by the "out of sight, out of mind syndrome". It is suggested that these expectations might be kept within more reasonable limits by putting in place a number of communications channels to keep assignee and organisation each aware of changes in the other (see page 84).

The literature also suggests that international assignees create expectations shortly before they return to the home-based organisation as anticipatory adjustment to reduce uncertainty (see page 79). The literature suggests that organisations should begin planning the assignee's return well in advance - six months is a common recommendation - in part, so that the organisation may become aware of the individual's expectations of return, and may in turn provide the individual with "realistic" job previews (see page 86).

Finally, more recent literature has begun to describe expectations in general (not only the expectations of international assignees undergoing repatriation) as arising from each individual's perception of an unwritten psychological contract existing between employer and employee (see page 99). There are suggestions that recent changes in technology-led international competition are leading the motives and expectations of employer and employee to converge (see page 103).

3.4 Expectation: A theoretical concept

It may be seen, therefore, that the literature on expatriation and repatriation contains numerous references to the "expectations" that individuals generate about the effect of an expatriate assignment upon their "careers". These references may be explicit (in which case the reference is often to "unrealistic expectations"), or implicit (as when returning assignees are described as being 'disappointed' or 'dissatisfied')

I have deliberately quoted "expectations" and "career" in this manner because the words are frequently used undefined, and their meanings are often unclear or ambiguous. Understanding is further complicated by current literature referring to research in the 1960s and 1970s even though academic "career" paradigms of the 1960s differ considerably from "career" paradigms of the 1990s.

A significant body of theory exists, however, for human motivation and expectation, particularly in the work environment. The following paragraphs examine those theories with the anticipation that they may be applied to, and function as a basis for the examination of expectation in repatriation.

3.4.1 Expectation in Motivation Theory

In determining the meaning of "expectation" in studies of returning assignees there is, initially, no difficulty in accepting a dictionary definition, viz.:

Expectation: *The anticipated outcome of a probabilistic situation: the anticipated outcome of a particular strategy*
(Reber 1985).

This is trite, however. It is clear that the expectations referred to are bound up in individuals' reasons for seeking or accepting international assignments, and that the extent to which those expectations meet fruition have at least some bearing upon the individual's motivation and subsequent actions following repatriation. Expectation, in this sense, is clearly bound up in motivation theory, which has its own extensive literature, and which is examined in broad-brush terms below.

Motivation theory attempts to explain why human beings behave as they do. The focus of most motivational research is to understand two psychological processes: arousal and choice. Arousal deals with the question about why individuals do anything at all: how is action initiated. Choice occurs after arousal: if an individual is active and seeking a goal, what are the determinants of the choice of action.

The practical application of motivation theory within organisations is generally intended for managers to encourage certain types of behaviour while discouraging others, to energise employees and to direct and channel their behaviour to accomplish organisational goals.

A number of motivation theories exist. The following paragraphs examine some significant theories, necessarily in summary form.

3.4.1.1 Theories of Arousal

Theories of this type, often referred to as Content theories or Needs theories, assume that people strive to satisfy a range of deep-seated needs. Although there may be some differences in assumptions about the relative importance

of different needs, there is general agreement that the desire to satisfy those needs energises behaviour.

3.4.1.1.1 Maslow's Need Hierarchy.

An American psychologist, Maslow (1954) saw Man as a "wanting" animal, motivated by a desire to satisfy certain specific types of need. He divided "needs" into a hierarchy, from lowest to highest:

- **Physiological** needs, such as the need to eat and drink.
- **Safety** needs: the need to provide freedom from physical harm, including shelter, clothing (and, in the work context, job security).
- **Social or Belongingness** needs: the need for love, affection and friendship.
- **Esteem** needs: the need for self-respect, the esteem of others, reputation and prestige
- **Self-actualisation**: the desire for self-fulfilment through becoming everything that one is capable of becoming.

Maslow proposed that lower-ordered needs dominate motivation until those needs are satisfied. As lower-ordered needs are satisfied so higher-ordered needs dominate motivation. In the work environment, the arousal process is due to need deficiencies: people want certain things in their jobs, and will work to fulfil those needs.

The primary criticism levied at Maslow's theory is that it is largely the result of armchair theorising, based upon little research evidence (Hall and Nougain, 1986).

Considerable research seems to indicate that need hierarchies can be measured in individuals, but that the components that make up such hierarchies tend to vary from individual to individual, while there is little evidence to support Maslow's explanation of the way that different levels of need trigger different motivations (Rollinson et al 1998).

The half century that has elapsed since Maslow formulated his needs hierarchy has seen wide-ranging changes in commerce, employment and standards of living, particularly for wage earners in developed countries. It may be that the motivators influencing individuals in today's organisations are different from those that operated fifty years ago.

The theory may be too simple and imprecise to be used successfully to influence employee motivation. On the other hand, the theory's very simplicity makes it an ideal starting point for managers and practitioners to commence thinking about their subordinates' needs, and the extent to which those needs are met in the current work environment.

3.4.1.1.2 Herzberg's Motivation-Hygiene Theory.

Herzberg et al (1959) and Herzberg (1986) suggested that certain extrinsic factors associated with the environment surrounding a job (Hygiene factors) have the power to demotivate, while other intrinsic factors associated with the job itself (Motivating factors) have the power to energise or motivate behaviour.

Hygiene factors include salary, working conditions, company policy and administration. If the individual considers these factors to be inadequate, he or she is likely to be demotivated. The provision of adequate hygiene factors removes demotivation but does not motivate: the employee may remain with the organisation but is unlikely to give their best effort.

Motivating factors include responsibility, achievement, recognition and advancement. In the absence of these factors the individual is not demotivated, but neither is he or she motivated. The provision of these factors motivates the individual to provide consistent high-quality innovative self-administered output.

There is clearly a correspondence between Maslow's hierarchy of needs and Herzberg's motivating/hygiene factors, Herzberg's hygiene factors approximating to Maslow's lower-order physiological needs, and motivating factors approximating to higher-ordered needs.

Herzberg's methodology has received considerable criticism: in particular, that the emergence of two distinct categories might be expected to emerge when individuals are asked to describe "satisfying" and "dissatisfying" events separately. A secondary criticism concerns Herzberg's interpretation of the resulting responses, which some argue simply reflect the very human tendency to attribute success to ourselves and failure to the environment. Finally, Herzberg has tended to imply a general applicability to his ideas, which some critics consider fails to take into account inevitable individual differences (Smith et al 1982; Tyson 1989).

Nevertheless, Herzberg's insistence that managers cannot truly motivate, but can only create a motivational climate that enables individual's internal motivation, has had considerable influence. This is clearly evidenced by job-enrichment initiatives by organisations aimed at enhancing motivation through job-rotation, job-enlargement, and enrichment through allowing or encouraging initiative, variety, innovation and self-management.

3.4.1.2 Theories of Choice

Although the theories of arousal outlined above may tell us something about work-related factors that could trigger motivation, they have little to say about the mechanism of motivation itself, and cannot explain why two people with identical needs should pursue them with different degrees of intensity and persistence.

This is addressed by theories of choice, often referred to as process theories of motivation. These focus upon variables that may account for the direction, intensity and persistence of behaviour. An important and common feature of these theories is a recognition that, because individuals have preferences for certain outcomes rather than others, their behaviour is the result of conscious choices.

3.4.1.2.1 Adams's Equity Theory

According to Adams (1963) an employee exchanges *inputs* (such as education, experience and effort) for *outputs* (such as salary, status and rewards which are intrinsic to the job). They measure inputs and outputs subjectively: the value that they place upon inputs and outputs may differ from the values perceived by employers or colleagues.

Individuals perceive *inequity* by perceiving that the ratio of their outputs to inputs differ from the output/input ratio of other employees. Perception of this inequity leads employees to adjust inputs and/or outputs to reduce the level of perceived inequity. In the case where individuals perceive their own output/input level as unsatisfactorily low they may attempt to increase their outputs but, should they be unable to do so, are likely to reduce their inputs by providing less effort, lower productivity and a lower quality of work.

Equity theory thus suggests that people make contributions to an organisation in exchange for rewards and inducements, and are motivated by a desire for fairness. When they believe they are being treated unfairly, they behave in ways that they believe will restore their sense of equity.

Adam's theory is relatively straightforward, and consequently comparatively easy to test: researchers have found the theory to have good predictive powers, particularly in conditions where under-reward may exist (Rollinson et al 1998). On the other hand, different people appear to have different sensitivity to and tolerance of perceptions of inequity, so that it becomes difficult to generalise about the responses of different people to the same set of circumstances. In addition, there is some evidence that people can tolerate higher levels of perceived inequity if the reasons for that inequity are very carefully explained.

3.4.1.2.2 Vroom's Expectancy Theory.

Vroom (1964) proposes that people are driven by the expectation that their acts will produce results. Workers assess both their ability to perform a task and the probable type of reward for successful performance.

Given a likelihood E that an action will lead to an outcome or goal, and the attractiveness or valence V of that outcome, then the extent of motivation M equals $E \times V$.

Vroom sees motivation taking place in three phases:

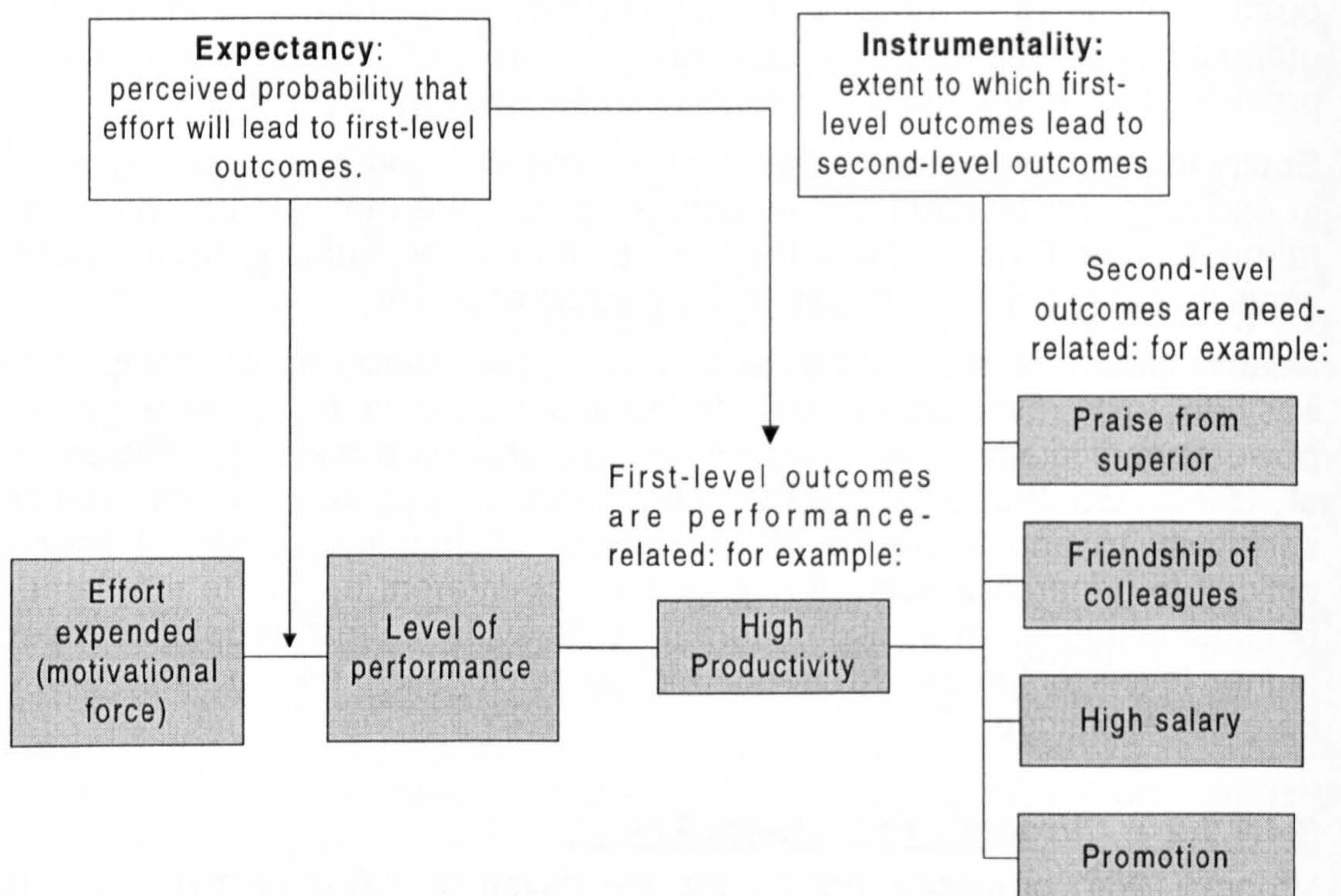
- **First**, the effort-expectancy link: the individual must believe that extra effort will help to attain a target.
- **Second**, the target-outcome link: belief that the attainment of a target will produce an outcome.
- **Third**, the evaluation of the outcome to determine the extent to which it is desirable or undesirable

Motivation only occurs in the presence of both links leading to a desirable outcome.

Once again, research tends to indicate that, although the core theory is generally and universally valid, there are cultural, environmental and individual differences in the types of rewards that actually produce motivation.

A general model of behaviour based upon Vroom's expectancy theory is reproduced below:

Figure 3.3: Basic model of expectancy theory (from Mullins 1999)



Notice the distinction between the first-level and second-level outcomes. The first-level outcomes are performance-related, and refer to the quantity of output. Performance outcomes acquire valence from the expectation that they will lead to other outcomes as an anticipated source of satisfaction.

The second-level outcomes are need-related. They are derived through achievement of first-level outcomes: people generally receive rewards for what they have achieved, rather than for effort alone or simply for trying hard.

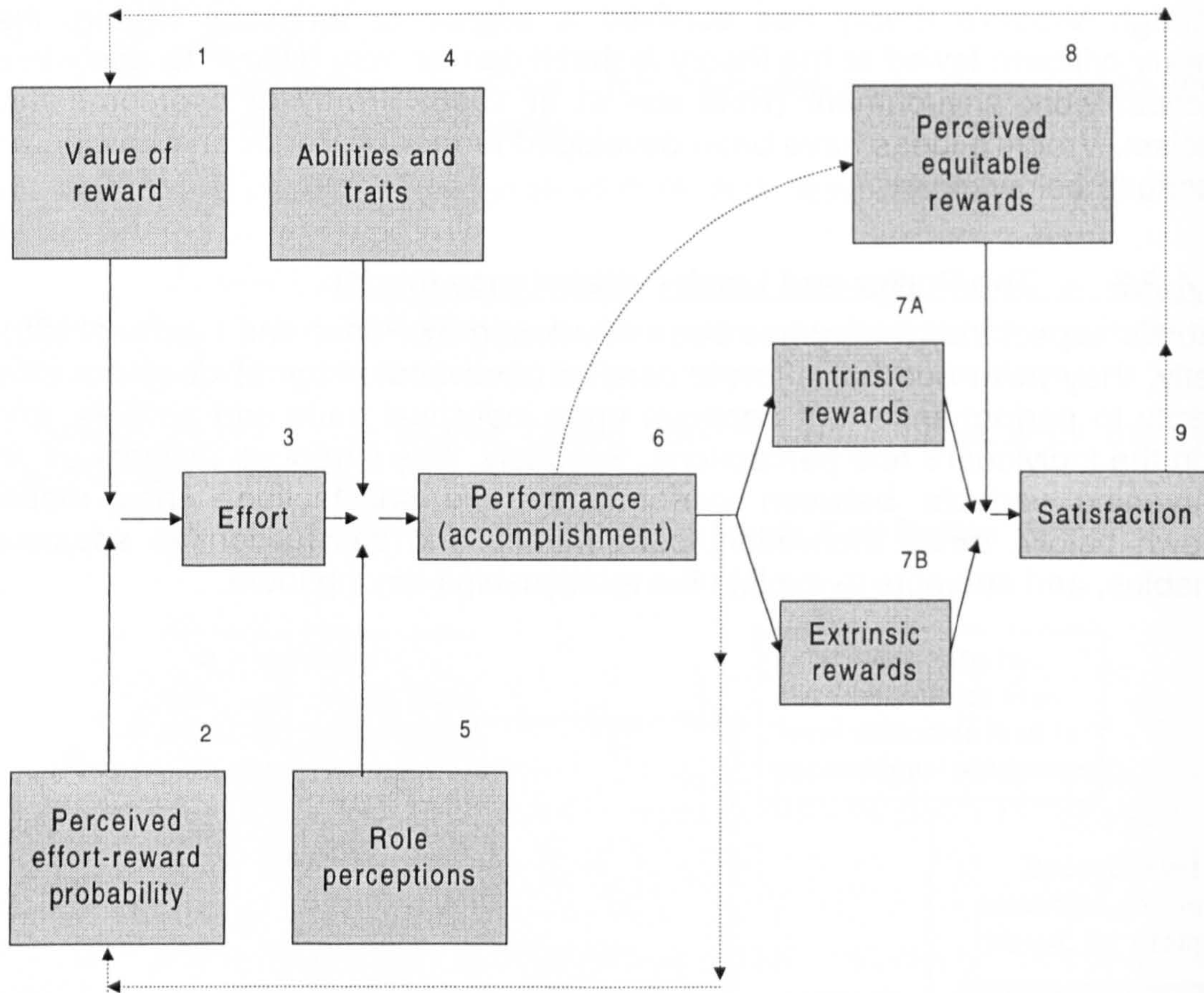
Although Vroom's theory has survived a degree of empirical testing, the primary criticism levied at the theory is that it can be very difficult to apply in a practical work environment (Rollinson et al 1998). Partly to overcome this criticism, Vroom's ideas have been developed further by Porter and Lawler, as described below.

3.4.1.2.3 The Porter and Lawler expectancy model

Vroom's expectancy theory has been developed by Porter and Lawler (1968). Firstly, they point out that effort expended (motivational force) does not lead directly to performance, but depends upon individual traits and abilities, and upon the individual's role perceptions. Secondly, they introduce rewards as an intervening variable between performance and satisfaction. Their model (shown below) treats motivation, performance and satisfaction as separate variables, and attempts to explain the relationships among them.

Figure 3.4 The Porter and Lawler motivation model.

(From Porter and Lawler (1968) p165).



A brief explanation of their model runs as follows:

Individuals desire rewards that they hope to achieve from work. The **value** (1) placed upon those rewards depends on the strength of their desirability.

Perceived effort-reward probability (2) is similar to Vroom's expectancy, and refers to the individual's expectation that certain rewards are dependent upon a given amount of effort.

Effort (3) describes how hard the individual tries, or the amount of energy exerted by the individual. It is mediated by the value of the reward and the perception of the effort-reward relationship.

They suggest that effort does not lead directly to performance, which is influenced by **individual characteristics** (4) such as

intelligence, knowledge, skill, training and personality. They also suggest that the direction, level and type of action taken by the individual are influenced by individual **role perceptions** (5), that is, by the way in which the individual views their work and the role that they should adopt.

Performance (6) or accomplishment, then, depends not only upon the energy expended, but also upon the way that it is expended. Individuals lacking necessary ability or personality, like individuals having a poor understanding of what is required, may achieve comparatively little despite considerable expenditure of energy.

The rewards (7A, 7B) are desirable outcomes. **Intrinsic rewards**, such as sense of achievement, are internal to the individuals themselves: these correspond somewhat to Herzberg's motivators. **Extrinsic rewards** such as salary are provided by the organisation and others, and correspond somewhat to Herzberg's hygiene factors. Although Porter and Lawler see both intrinsic and extrinsic rewards as important and desirable outcomes, they suggest that intrinsic rewards are more likely to lead to job satisfaction through performance.

Individuals judge the level of rewards that they feel they should fairly receive for a given level of performance: these are the **perceived equitable rewards** (8).

Finally, **satisfaction** (9), an individual internal state or attitude, is determined both by the actual rewards achieved and by the perceived equitable rewards. Satisfaction derives from actual rewards that meet or exceed the perceived equitable rewards.

The Porter and Lawler model therefore suggests that job satisfaction is more dependent upon performance than performance is upon job satisfaction. Certainly, satisfaction affects performance via the feedback loop affecting perceived value of reward, while performance stimulates itself indirectly via the effort-reward relationship. Nevertheless, the model makes it clear that satisfaction is unlikely to be found in the absence of performance or accomplishment.

The model has stood up well to extensive empirical testing. One criticism of the model is that its comprehensive nature makes it difficult to apply in practice. Another criticism is the model's assumption that people make rational and objective decisions, when these may sometimes be based more upon intuition (Rollinson et al 1998).

Despite these rather minor criticisms, however, the model provides considerable insight into individual motivation within a real-world work environment.

In the context of expatriation, however, a more important warning comes when considering the universality of these theories in general, and this model in

particular. Moran and Harris (1981) indicate that no one explanation of human behaviour is absolute, and that human beings exhibit a mixture of rational and emotional behaviour referred to as personality. Personality is formed by the environment and culture in which the individual is raised, so that people think, learn and behave in diverse ways in diverse cultures.

Thus Hofstede (1980) indicates that culture can influence the factors that motivate and demotivate behaviour: in particular, Vroom's theory and Porter and Lawler's model depend significantly upon the extent to which employees believe that they have control over the outcomes of their efforts, and that such belief is culture bound.

Adler (1986) points out that most motivation theories in use today were either developed in the US by American researchers, or have been strongly influenced by American theoretical work. She suggests that it is America's strong emphasis on individualism that has led to the expectancy and equity theories of motivation. By emphasising rational and individual thought as the basis of human behaviour, these theories may reflect the value system of Americans more than offer universal explanations of motivation.

3.4.1.3 Summary: Motivation Theory

Motivation theory is concerned with the psychological processes that cause the arousal, direction and persistence of behaviour. There is a general consensus that motivation is an individual phenomenon: each individual is unique, and motivation theories allow for this difference to be demonstrated. Thus different people have different needs, expectations, values, attitudes and goals.

Motivation is also usually described as intentional and under the individual's control, so that behaviours that are influenced by motivation are typically viewed as actions the individual has chosen to undertake.

Motivation is multifaceted: two important factors within motivation theory are those of arousal (what activates or energises an individual to take action) and direction (what choices the individual makes in undertaking that action). A third factor, persistence (the degree to which a behaviour, once started, is continued) has received comparatively little attention.

The purpose of motivational theories is to predict behaviour. Motivation itself is concerned with action, and with the internal and external factors that influence an individual's choice of action. In those terms a definition by Mitchell (1982) summarises motivation as *"the degree to which an individual wants and chooses to engage in certain specified behaviours"*.

3.5 Career: a theoretical concept

The literature on repatriation frequently refers both to the effect of an international assignment on an individual's career, and to the individual's job- and career-related expectations generated during the course of an international assignment. Again, because the word "career" is frequently used with little or no explanation or definition, some examination of "career" as a theoretical concept is in order.

3.5.1 The Linear Career Model

In the decades following World War II, continuous economic prosperity fuelled the expansion of large-scale businesses, leading to new and increasing job prospects for managers, professionals and technical experts (Goffee and Scase 1997). Managers in particular found themselves working within hierarchies where pay, promotion and security were major incentives. Satisfaction from their jobs was derived largely from their location within clearly defined career structures within which personal progress could be measured according to age, experience and achievement.

Within such an environment the promotion process takes a central significance. Thus Sofer (1970) found British managers preoccupied with promotion such that past moves and decisions were discussed largely in terms of their implications for promotion, with three-quarters striving to "move up".

Similarly the Pahls (1971) indicated that managers generally considered life as a hierarchy, with success meaning moving up within that hierarchy, while marking time and staying in the same position were interpreted as dropping out.

In this linear model of career, with career success measured by reference to various age-related stages, there would be broad agreement within an organisation about the age by which certain positions should be reached. Early promotion conferred additional psychological reward, whilst late promotion or becoming "stuck" could bring anxiety, frustration and personal doubts.

This linear model has been sufficiently entrenched in our culture for relevant metaphors and paradigms to have entered both academic and everyday language. Thus Buzzanell and Goldzwig (1981) point to careers being described as "competitions" or "tournaments" having "winners" and "losers": the battle is "won" when one reaches the "top" of the organisational apex. In this language "up" is good, "action" is positive and "quick movement" is worthy of recognition. Those who are not moving become "stuck", and may be classified as "deadwood" or "failures".

Also, within this language, time is a valuable and limited commodity in which "windows of opportunity" close rapidly, so that the busier one appears to be, and the quicker one's career movement, the more the individual can point to

“success”: “fast” career movement informs others that the individual has layered more relevant career experiences into shorter times.

Finally, the language prescribes correct paths for achieving corporate success by identifying the best trajectory: thus the career “path”, “route”, “trajectory” or “ladder” provides a linguistic structure signalling the corporate reality: a struggle for power and resources in an environment which presupposes that all organisational members have the same goal: to “race” to the top of the “ladder”.

Such metaphors and paradigms are epitomised in Rosenbaum’s “tournament” models (1984, 1989). In this model, organisational members enter competitions for promotions. “Winners” at each level may compete in the next contest for increasingly prestigious positions: “losers”, by contrast, are neither presented with future advancement opportunities nor considered for important positions. Once identified as “losers” there is little or no chance to catch up: “losers” never catch up with earlier “winners”.

3.5.2 Non-Linear Career Models

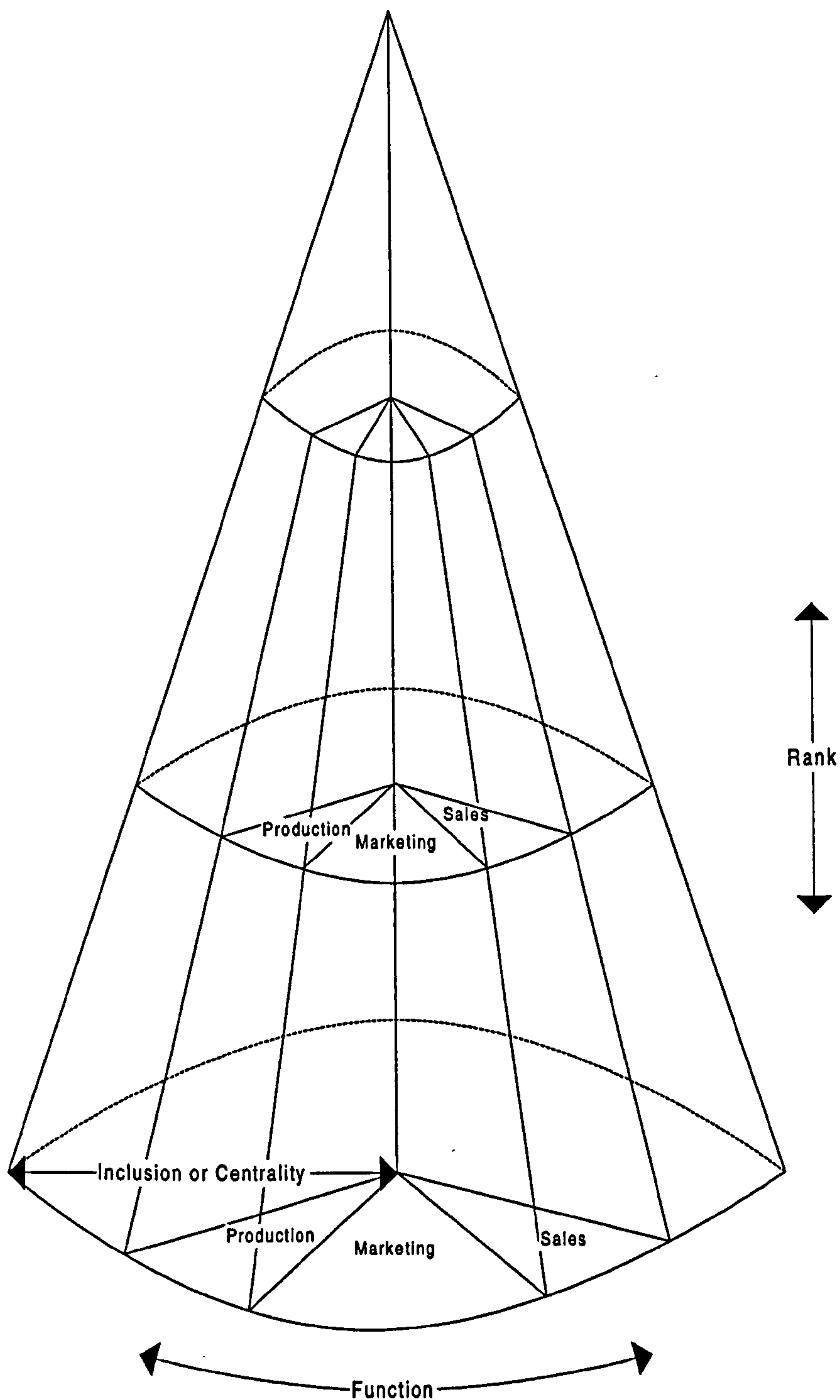
In contrast to the rigid linear career model described above, researchers have recently begun to describe careers in more fluid terms. They note that increased globalised competition during the 1980s allied with technological change and the pervasive spread of technological change have led to processes of organisational restructuring which have radically altered individuals’ work experiences and aspirations (Goffee and Scase 1997).

With the shift towards decentralisation, many managers are increasingly required to work in smaller, semi-autonomous business units which place a premium on “flexibility” and “responsiveness” (Kanter 1983). Within such organisations, fewer are able to pursue “orderly”, predictable career paths within large, centralised bureaucratic systems (Markham et al. 1987). On the contrary, within these “looser”, “flatter” organisations there are conscious efforts to reduce the significance of hierarchy, rules and procedures for achieving co-ordination and control, with less emphasis upon rewarding managers with security and steady career progression (Kanter 1983). Individuals are expected to behave as “entrepreneurs” to create their own career strategies.

Hence Evans’ contention (1988) that the notion of career uniquely as a vertical ladder has become increasingly simplistic, out of line with the reality of leaner, fast-growth organisations where either there are no ladders, or where ladders change with changes in strategic orientation.

Schein (1971) created an organisational model which envisages career transitions to take place in three dimensions as shown in Fig. 3.5:

**Figure 3.5 A Three-Dimensional Model of an Organisation
(from Schein 1971)**



The model envisions an organisation comprising a number of operating divisions. Individuals within each operating division hold differing “ranks” where, in general, correspondingly smaller numbers of individuals hold higher rank. Simultaneously, an individual will have a greater or lesser degree of

“centrality” which denotes the extent to which company secrets are entrusted to him or her, ratings by others of his or her position, and his or her actual power.

Within this model, movement within the organisation can occur along three conceptually distinct dimensions:

- **Vertically** - corresponding somewhat to the notion of increasing or decreasing one's rank or level in the organisation;
- **Radially** - corresponding roughly to the notion of increasing or decreasing one's centrality in the organisation: to becoming more or less “on the inside”, and
- **Circumferentially** - corresponding roughly to the notion of changing one's function, or moving from one organisational division to another.

Schein posits that it is at least theoretically possible for movement to take place in just one dimension at a time. Thus the individual who moves primarily upward without moving very far inward or around could be a highly-trained technical specialist who must be elevated in order to be retained, but who is given little confidential information or administrative power outside of his own immediate area. It is possible to move primarily inward without moving upward or around as in the case of the stores clerk who enjoys power beyond his obvious grade by his ability to assist or hamper a project which requires the provision of scarce materials. Finally, movement around without movement inwards or upwards may be exemplified by the eternal student who, as each new skill or work area is mastered, moves on to another.

Each type of movement takes place across a corresponding boundary, where:

- **Hierarchical** boundaries separate the hierarchical ranks one from the other;
- **Inclusion** boundaries separate individuals or groups differing in centrality, and;
- **Functional** (or Departmental) boundaries separate departments, divisions and functional groupings.

In most cases, a career will be some sequence of movements in all three dimensions: the individual will have been moved up, will have had experience in several departments, and will have moved into a more central position in the organisation. The final position may be reached after smooth, even movements within the model, or may be reached by a zigzagging course.

Within this model, therefore, the career may be thought of as a sequence of boundary passages. The individual may move up, around and in; and every career is some sequence of moves along these three paths.

Feldman and Thomas (1992) suggest that the expatriate, being by definition a foreigner in an alien culture, may have difficulty in crossing inclusionary boundaries whilst on the overseas assignment precisely because those are

exclusionary rather than inclusionary qualities. It might also be argued that the international assignee, having adapted and adjusted to the foreign culture and environment, returns to the home organisation (frequently described as "xenophobic") with alien qualities similarly likely to inhibit inclusionary boundary crossings in the home environment.

This thesis accepts the definition of career that evolves naturally from this model and that is accepted by Greenberg and Baron (1993), viz.:

Career: the sequence of occupations and jobs individuals hold during their working lives. Most careers develop *vertically*, through promotions; *horizontally*, through different jobs; and *radially*, towards inner circles of power within an organisation.

It is useful to pursue this model a little further, however, for an insight into what may occur at career boundaries (because the process of expatriation and repatriation involves a number of such crossings):

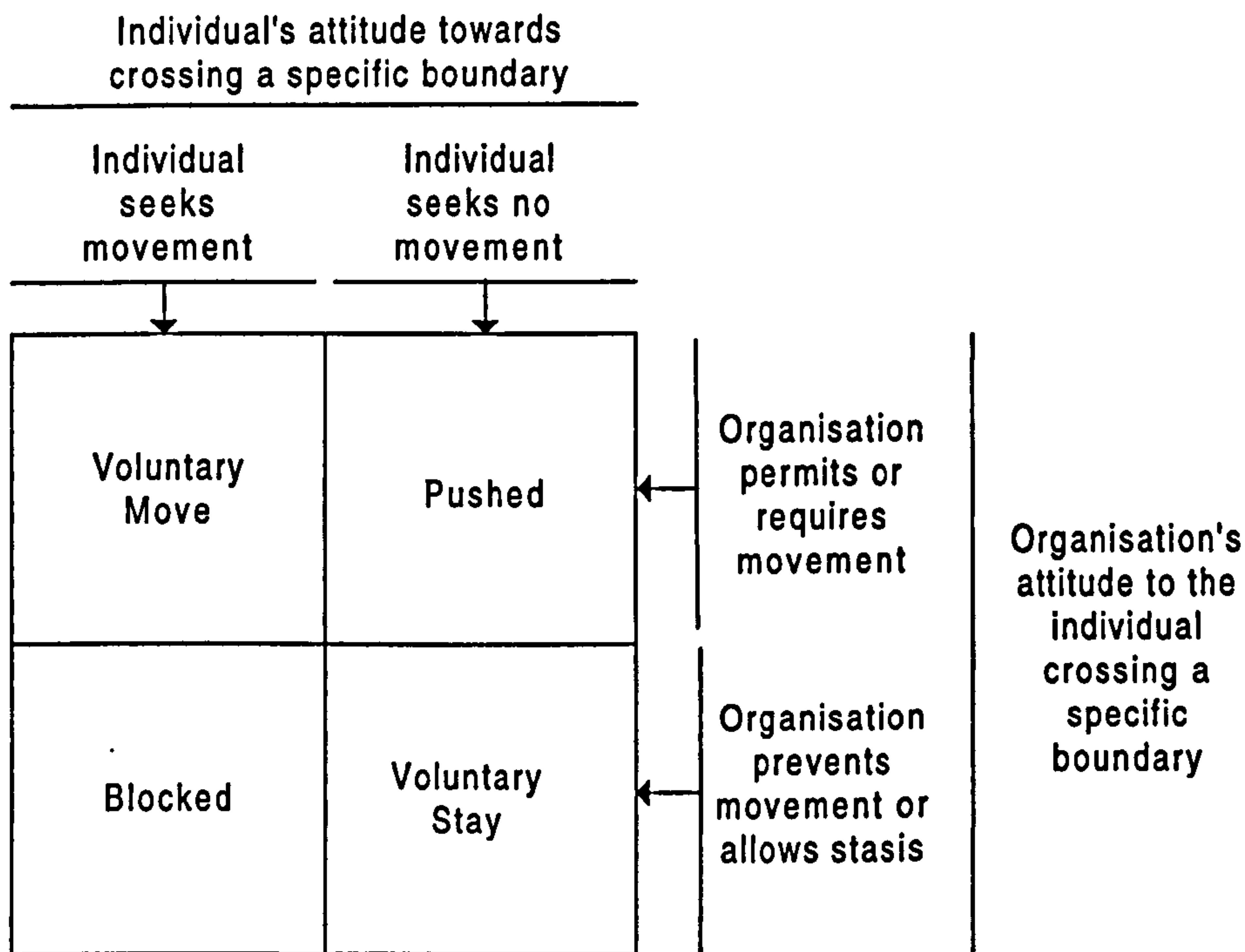
Schein envisages career movement as a process of learning (or organisational socialisation, in which the organisation influences the individual), followed by a process of performance (or innovation, in which the individual influences the organisation). As skills become obsolete, so further learning allows further performance.

He conjectures that education and training occur primarily in connection with passage through functional boundaries, while organisational socialisation occurs primarily in connection with hierarchical and inclusion boundaries. By contrast, innovation occurs primarily at the mid-point between boundary passages because the individual must be far enough from the earlier boundary passage to have learned the requirements of the new position and to have earned centrality in the new subculture, yet must be far enough from the next boundary passage to be fully involved in the present job without being concerned about preparing for the future.

3.5.3 Career Boundary Crossings

Hayes and Hough (1976) take this model as a starting point in considering the dynamics of boundary crossing. They point out that an individual may be oriented to seek or to avoid a boundary crossing, while the organisation may require or permit a boundary crossing, or permit stasis, or prohibit a boundary crossing. These four possible scenarios are summarised in Fig. 3.6 below:

Figure 3.6 Activity at the Boundary
(From Hayes and Hough 1976)



Hayes and Hough conjecture that each scenario is likely to produce identity strain in the individual to a lesser or greater degree, with greater levels of identity strain experienced as the individual's desire for and experience of boundary passages become more incongruent.

In the "Voluntary Stay" scenario the individual achieves what he wants by remaining where he is, and it is likely that this scenario presents fewest problems and least strain.

In the "Blocked" scenario the individual's desire to cross a boundary is thwarted. He is likely to experience humiliation and loss of self-esteem (although these may be considerably lessened if the situation is common to others, perhaps because of economic recession, rather than peculiar and particular to his own circumstances).

In the "Voluntary Move" scenario the individual achieves a desired boundary passage. He is likely to develop, before the boundary passage, a set of expectations about the role to which he is moving. The level of identity strain is likely to be low when this anticipatory adjustment has been satisfactory, and higher when anticipatory adjustment has been inadequate. Nevertheless, he is likely to be motivated to arrive at a satisfactory adjustment to the new situation.

Finally, in the "Pushed" scenario, the individual finds himself forced into an unwanted (and perhaps unanticipated) boundary passage. This scenario is likely to produce the highest levels of strain, especially if the change reflects (or appears to reflect) on his competence and status.

It should be noted that the return from an international assignment is clearly a situation in which the organisation permits or requires movement, so that it fits into either the "Voluntary Move" or the "Pushed" scenario described above.

Hayes and Hough conclude that "the more unrealistic the individual's expectations about his progress through the organisation, the greater will be the likelihood that he will experience identity strain". They indicate that the organisation can take action to prevent identity strain by enabling and persuading the individual to assess his realistic potential and the opportunities within the organisation for exploiting that potential. They indicate that honest recruitment information together with performance feedback may assist this process, and that such feedback is better provided by supervisors and managers who are aware of their subordinates' personal needs and attributes.

Organisations, they say, may wish to act positively to avoid or reduce their employees' identity strain because individuals are likely to employ coping behaviours including:

- **Ritualism:** the individual, feeling unable to accept the situation in which he finds himself, may continue with only the form of his role, lose interest in work, and settle down to minimum performance, preserving only outward appearances;
- **Rebellion:** the individual may equate 'normal' behaviour with failure and act in opposite ways, including aggression, ruthlessness and sabotage;
- **Withdrawal:** the individual feels that he cannot change the situation and opts out by leaving the organisation.

Such coping behaviours are unlikely to result in the efficient utilisation of the individual's time, skills and experience.

This begins to sound familiar. Indeed, these are exactly the arguments that appear in the literature on repatriation adjustment: that the individual creates job- and career-related expectations of the return from an international assignment: that these expectations will be accurate to a greater or lesser degree, and that their accuracy (or the extent to which they are met) will determine, at least to some extent, the outcomes from the assignment.

3.6 Repatriation Expectation and Expectancy Theory.

The literature makes frequent mention of international assignees' "expectations", but not usually in any organised sense.

Firstly, individual researchers and practitioners tend to focus upon one phase or aspect of the expatriation-repatriation cycle: upon selection, for example, or training and preparation. It is unusual to find the entire expatriation-repatriation cycle treated as an integrated whole.

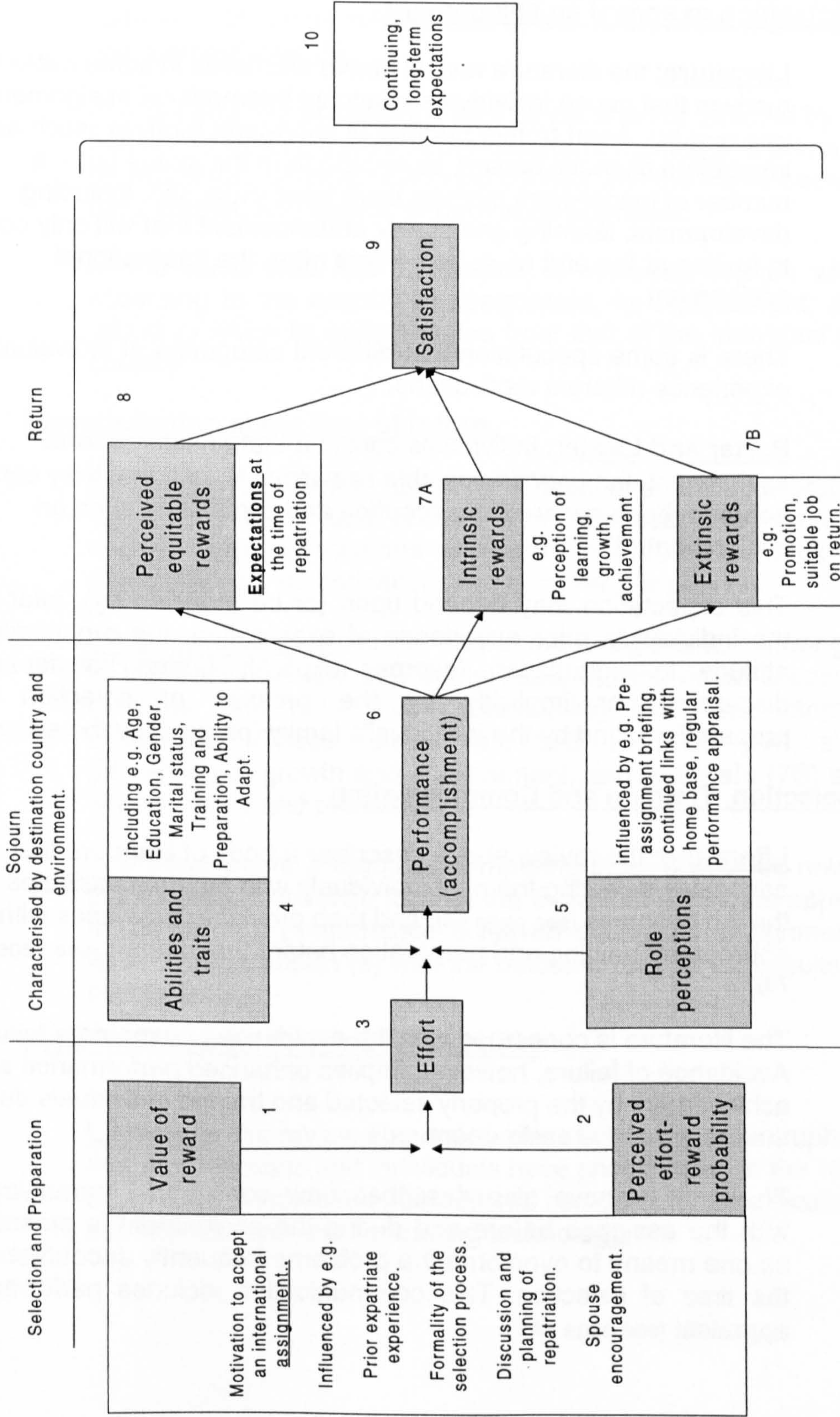
Secondly, a number of different meanings are attributed to "Expectation", including

- being, or influencing, the motives for an individual to accept an international assignment;
- the individual's perception of the job (and its inherent status and remuneration) that he or she merits on return
- the individual's perception of the international assignment's value in the long-term
- the individual's perception of an unwritten psychological contract between employer and employee.

"Expectations" are considered to be modified by a number of different mechanisms, including direct influence of expectation (e.g. by discussion between employer and employee), and indirect influence (e.g. cultural training allowing easier adjustment yielding greater accomplishment leading to higher expectations of return).

It may be possible to synthesise these different viewpoints and treatments by considering them in terms of the Porter and Lawler model, viz.:

Figure 3.7: "Expectations" within the Porter and Lawler framework.



The synthesis suggested in Figure 3.7 is derived by locating aspects of the expatriation and repatriation literature within Porter and Lawler's model (see Fig 3.4) as follows:

Motivation to accept an assignment

Literature: the literature review above discusses in some detail the motives that cause individuals to accept international assignments (see page 51). Apart from a number of short-term motives (such as immediate financial reward, or escape from the status quo), a number of longer-term motives have been proposed, including development, learning and career enhancement that will only come to fruition at the end of, or some time after, the international assignment.

There is some speculation that different categories of individual will experience different motivations.

Porter and Lawler: individuals consider that an international assignment can provide valuable rewards (1), and that they can achieve those rewards by accepting and completing such an assignment (2).

This expectation may depend upon (or be modified by), inter alia, the individual's prior experience of expatriation, the organisation's attitude to expatriation (express explicitly during pre-departure discussion, or implicitly by the process of selection and preparation), and by the individual's family (particularly the spouse).

Selection, Training and Communication

Literature: the review above describes a body of literature that advocates selecting the right individuals with the right attributes for the job overseas (see page 69), and then providing assignees with appropriate training and preparation before they depart (see page 79).

The literature is concerned with the avoidance of expatriate failure. Avoidance of failure, however, implies enhanced performance and achievement by the properly selected and trained individuals during the course of the assignment.

The review above also describes how continued communication with the assignee before and during the assignment is prescribed as one means to overcome the problems frequently encountered at the time of selection. This communication includes performance appraisal (see page 84).

Porter and Lawler: during the assignment the individual expends **effort** (3) in undertaking the requirements of the job. Effort leads to **performance**, achievement or accomplishment (6), but modulated by the extent to which the individual's **abilities** and traits (4) are suitable to the tasks in hand, and by the clarity of the individual's **role perceptions** (5).

Abilities and role perceptions may be modified or affected by a number of factors, including pre-departure training and preparation, pre-departure briefing, continued contact with the home-based organisation, and regular performance appraisal.

At the same time, the experience of overseas sojourn will differ according to the country of assignment, its environment, and the extent to which its culture varies from that of the individual's home country.

Dissatisfaction at the time of return.

Literature: the review above describes one potential problem at repatriation to be that of returnees' "unreasonable" (or at least, unduly high) expectations of reward not being met, leading to dissatisfaction, demotivation, and turnover (see page 79).

Porter and Lawler: at the end of the assignment, following return to the home country and home base, the individual assesses the **rewards** that have been forthcoming from the international assignment. These rewards are both **intrinsic** (7A), such as perception of growth and achievement, and **extrinsic** (7B) such as salary, status and promotion.

The assessment is made by comparing those perceived rewards to the **expected rewards** (8) that the individual considers appropriate to the level of performance achieved during the assignment. The level of **satisfaction** (9) with the outcome reflects the results of that comparison.

Long-Term Career-Related Expectation

Literature: the review above describes the changes and upheavals that organisations and individuals have encountered in the 1990s as a result of increased international competition, globalisation, and communications and computing technology.

The literature implies that, as a result of these changes, both organisation and individual may be taking a longer-term view of the merits of international assignments (see page 103).

Porter and Lawler: in addition to the intrinsic rewards and the immediate extrinsic rewards that have been forthcoming, however, the individual may expect the international assignment to have additional, **long-term influence** (10) upon his or her future life and career.

In this way it becomes possible to envisage the various "expectations" mentioned in the literature (expectation at the time of selection as motives for accepting an assignment; expectations of reward at the time of return; expectations of long-term career influence following return and reabsorption) within a model based upon expectation theory.

The synthesis ignores the feedback loops that are inherent in the Porter and Lawler model. Rather than a continuous process, an international assignment may be more a series of discrete steps in which feedback loops are neither appropriate nor possible. The literature's frequent description of an international sojourn as "out of sight, out of mind" would seem to reinforce such a view.

The individual's initial expectations, expressed as motives to accept the assignment - that the international assignment will provide valuable reward - are effectively fixed by the departure from home to host country, and do not come to fruition until repatriation and return.

(On the other hand, the literature does recommend communication between organisation and assignee during selection, during the assignment, and prior to return. For the sake of simplicity, the presence or absence of such communication is treated as a variable rather than as a feedback loop).

It must be stressed that Figure 3.7 is being not being put forward as a model for testing at this time: that would not be appropriate for the exploratory study that this is. Figure 3.7 is used as a visual aid to allow a number of types or views of "expectation" to be considered within the overall process of expatriation and repatriation.

3.7 Repatriation Expectation: A suitable subject for study

From the foregoing, we see that assignees returning to their home-based organisation after an international assignment are considered to bring with them job- and career-related expectations that are variously formed:

- at the time of selection, or
- by the overseas experience, or
- during pre-return planning, or
- from perception of an unwritten psychological contract between employer and employee.

In order to encompass the variety of ways in which "expectation" is used in the literature on expatriation and repatriation, and in order to study the phenomenon further, the following working definition will be used:

Expectations: the evaluations that an individual makes and modifies throughout an international assignment about the job-related and career-related effects and consequences of that assignment on the individual's future.

There is general agreement that these expectations are frequently inaccurate. This inaccuracy is variously ascribed to:

- misleading selection interviews, or
- isolation, or
- absence of return planning, or
- myth, or misunderstanding of career dynamics

There is also a reasonable consensus that returnees with accurate job- and career-related expectations adjust better and perform better than those whose expectations are inaccurate and not met. However, despite a number of suggestions and prescriptions, there is very little evidence to indicate what factors affect repatriation expectations, or what organisational action can effectively alter the accuracy of returnee's expectations.

In short, although references to repatriation expectation appear throughout the literature on expatriation, there is conflicting evidence as to when those expectations are formed, what they are, whether they change during the overseas sojourn, how organisations can modify them, or what other factors can affect them.

In considering repatriation expectation as a suitable subject for more detailed study, I am emboldened by my unexpected finding that nine of fourteen IHRM managers that I interviewed raised repatriation expectation as a problem. I am further emboldened by Black (1992: 190-191) who concluded:

"Most individuals experience substantial repatriation adjustment problems that have both individual and organisational costs. The results of this study suggest that expectations play an important role both in individuals' repatriation adjustment and in their job performance. Still, further research is needed to examine such issues as ... the antecedents that significantly influence the formation of job and nonwork expectations" (my emphasis).

3.8 Research Questions.

In attempting to fill the gap in the literature described above, the subject of this study will be expectations held by returnees from international assignments. To learn more about these repatriation expectations, the following research questions have been developed:

- 1. What work- and career-related expectations do individuals generate before, during and after an expatriate assignment ?**
- 2. How are the expectations of international assignees affected by organisational actions ?**
- 3. What other factors affect the expectations of international assignees ?**
- 4. What relationships exist between factors affecting the expectations of international assignees ?**

3.9 Propositions

The purpose of this section is to formulate propositions that test the research questions listed above. Propositions will generally be based upon assertions or implications from the literature. Where appropriate, propositions will be formulated in terms of expectancy theory in general, and the Porter and Lawler model in general, using Figure 3.7 as a guide.

3.9.1 Research Question1

The first research question asks:

"What work- and career-related expectations do individuals generate before, during and after an expatriate assignment ?"

The literature makes it clear that international assignees form work- and career-related expectations at the time that they are selected for the international assignment, before they have departed for the overseas destination. The literature also makes it clear that international assignees form job- and career-related expectations of their return and reintegration into their home-based organisation. Finally, at the conclusion of the repatriation process, based upon what has occurred before, during and after the assignment, the returned assignee assesses the effect that the international assignment will have upon that portion of the career that still lies ahead: as a prediction of the future this, too, is an expectation.

Motivation to accept an international assignment

The literature review above indicates that individuals are commonly motivated to accept an international assignment by the perception that the assignment will enhance their career (see page 53). There are indications that such a perception may be accurate in the case of high-flyers, but not always accurate in others.

Proposition 1. Assignees, at the time of their selection, will generally expect the international assignment to enhance their career prospects.

The literature review also indicates that individuals may be motivated to accept an international assignment:

- by the challenge offered by the assignment itself (see page 55),
- by the developmental and learning potential of the assignment (see page 55), or
- for reasons of immediate financial reward (see page 52).

Proposition 2. Assignees, at the time of their selection, will generally expect the international assignment to be challenging or exciting.

Proposition 3. Assignees, at the time of their selection, will generally expect the international assignment to be an opportunity for learning and development.

Proposition 4: Assignees, at the time of their selection, will generally expect the assignment to be financially rewarding.

These four propositions are constructed in terms of "expectations" rather than "motivations". The literature itself is frequently not expressed in terms of Motivation Theory, and more often than not states that individuals "expect" outcomes from the assignment at the time of their selection.

Expectations prior to return

The literature indicates that many individuals are motivated to accept an international assignment by the perception that such an assignment may be career-enhancing (see page 53). Such enhancement does not come to fruition, however, until the assignee has returned from the assignment for reintegration into the home-based organisational environment. It is at that point, the literature indicates, that the individual expects to see tangible evidence of such enhancement.

Proposition 5: Assignees, immediately prior to their return to the home base, will generally expect the return to enhance their career prospects.

The literature points to returnee's "unreasonable" expectations of returning to a challenging job having significant levels of responsibility and autonomy (see page 79). The implication, therefore, is that individuals do return from an international assignment having positive expectations of challenge from their reintegration into the home organisation.

Proposition 6. Assignees, immediately prior to their return to the home base, will generally expect the return to be challenging or exciting.

Although the literature indicates that individuals are motivated to accept an international assignment because they perceive such the assignment itself as a learning and developmental opportunity (see page 55), the literature does not generally imply that returnees expected the return to be developmental. On the other hand, it could be argued that individuals expecting the return to be career enhancing (proposition 5 above) and challenging (proposition 6 above)

might be likely to expect learning and development to continue after their return.

Proposition 7. Assignees, immediately prior to their return to the home base, will generally expect the return to be an opportunity for learning and development.

The literature indicates that some returnees are surprised and financially embarrassed by the high cost of living (or by the low levels of emoluments) that they encounter on their return (see page 78). Possibly returnees' "unreasonable" expectations of career progression (see proposition 5 above) contribute to this "surprise": in any event, it seems likely that returnees have positive expectations of financial reward from their return.

Proposition 8: Assignees, immediately prior to their return to their home base, will generally expect the return to be financially rewarding.

Continuing, Long-Term Expectation

One reason that the literature advises organisations to improve their repatriation procedures is to avoid the danger of handing the hard-won, expensively-acquired international experience of a dissatisfied returnee to a business competitor. The assignee who returns to the domestic organisation with high positive expectations, only to be caught up in the organisation's ad-hoc reactions to those problems, is likely to become disappointed and demotivated (see page 81)

There is a clear implication that the assignee, now returned and reintegrated into the home-base organisation, continues to view the international assignment as but one step in a continuing career. The positive career-related expectations that the assignee held prior to expatriation and prior to return may not have been met within the current organisation, but that does not necessarily mean that the expectations were false: it may simply mean that the expectations might be met elsewhere.

Proposition 9: Assignees, following return to their home-based organisation, will generally expect their future career prospects to have been enhanced by the international assignment.

3.9.2 Research Question 2.

The **second** research question asks

"How are the expectations of international assignees affected by organisational actions ?".

Formal or Informal Selection Methods.

The literature review pointed to research by Brewster and Harris (1998) (see page 72) indicating that individuals selected for an international assignment by more formal selection methods should have "more accurate" expectations of the forthcoming assignment and its effect upon their career.

For any given individual, however, any factor that provides "more accurate" expectations may serve to increase expectations that are unduly low, or to decrease expectations that are unduly high. Providing a number of individuals with "more accurate" expectations, then, might leave the average level of expectation unchanged.

However, the literature tells us that organisations frequently describe assignees' career-related expectations are "unreasonable" (by which they mean "unreasonably positive"), and that assignees' expectations are frequently unmet (because the reality is less positive than the expectation). It seem likely, then, that "more accurate" expectations will, in general, and on average across a number of individuals, be less positive expectations.

Proposition 10: The use of more formal selection methods will be associated with less positive career-related expectations.

Pre-Departure Discussion and Planning

The literature proposes that "more accurate" (presumably meaning "less positive") expectations should be instilled in the assignee by discussing and planning the eventual repatriation at the time of selection for the assignment (see page 83). Although this seems reasonable, a counter-argument is that over-eager recruitment officers may "sell" the international assignment by inflating its challenge and importance (see page 58).

Proposition 11: Repatriation planning or discussion at the time of selection will be associated with less positive career-related expectations.

Training and Preparation

The literature review indicates that pre-departure training and preparation may assist individual adjustment to the foreign culture and environment, and may reduce the incidence of failure (see page 72).

The significance of this suggestion in terms of Motivation Theory in general and the Porter and Lawler model in particular is that pre-departure training and preparation provides the individual with skill and knowledge that may be applied during the assignment in order to enhance performance (enhanced performance and achievement being, presumably, the mirror-image of failure). According to the Porter and Lawler model, expectations are based upon performance, so that enhanced performance and achievement may be assumed to enhance expectation.

Proposition 12: The provision of pre-departure training and preparation will be associated with more positive career-related expectations immediately prior to return from the assignment.

Continued links with the assignee during the assignment.

The literature contains recommendations that organisations should maintain links with their assignees throughout the assignment to avoid the "out of sight, out of mind" syndrome (see page 84).

On the one hand, the literature implies that this continuing, two-way communication, by keeping the individual aware of changes at home, and keeping the organisation aware of changes in the individual, is likely to result in more accurate expectations of return. As before, "more accurate" may reasonably be taken to mean "less positive".

On the other hand, continued links and communication includes periodic performance reviews. In terms of the Porter and Lawler model, periodic performance reviews would be expected to examine the assignee's role perceptions, and assist the individual to undertake required job tasks in the required manner. This in turn might be expected to increase performance and accomplishment during the overseas sojourn, leading eventually to more positive expectations immediately prior to return.

The resulting proposition is expressed to take into account two potentially conflicting directions for continued links and communication to affect the expectations of returning international assignees.

Proposition 13: Continued links and communication between the international assignee and the home based organisation throughout the assignment may affect the assignee's expectations immediately prior to return.

The literature proposes that the assignee's return from assignment for reintegration into the home base should be planned, and that adequate time should be allocated to preparation for the return. The literature suggests that the planning and preparation should include providing assignees with accurate

and realistic job previews, which implies that individual's expectations will be directly affected by the planning and preparation (see page 86).

Similarly, the literature recommends that the line manager to whom the assignee will report after return should be involved in return planning and preparation, since the line manager has a vested interest in a beneficial return, and is best placed to communicate "accurate" expectations to the returnee (see page 87)

Again, "more accurate" expectations will be taken to mean "less positive" expectations,

Proposition 14: Planning and preparation for the assignee's return to the home organisation will be associated with less positive work- and career-related expectations.

Proposition 15: The involvement of the assignee's departmental line management in planning and preparing for the return will associated with less positive work- and career-related expectations of return.

3.9.3 Research Question 3

The **third** research question asks

"What other factors affect the expectations of international assignees ?"

This section commences by considering those personal, individual characteristics of the assignee that may affect the individual's work-and related expectations.

Age of the assignee

The literature indicates a trend for organisations to recruit younger employees for international assignments associated with individual or organisational development (see page 58). There are also indications that younger assignees are better able to adapt and adjust to the foreign culture and environment - leading, presumably, to higher levels of performance and achievement, and more positive expectations of return.

At the same time, older assignees are likely to use their life experience in general, and their deeper knowledge of the home country and home organisation in particular, to generate more accurate expectations of return. As before, "more accurate" is taken to mean "less positive".

At the same time, older assignees are likely to use their life experience in general, and their deeper knowledge of the home country and home organisation in particular, to generate more accurate expectations of return. As before, "more accurate" is taken to mean "less positive".

Proposition 16: Younger assignees will have more positive work- and career-related expectations.

Gender

The great majority of expatriates are known to be male (although increasing numbers of female international assignees are being reported), so that, of necessity, the majority of research on international assignees reports upon male assignees. Very little is known about female international assignees, but Jelinek and Adler (1988) pointed out instances when being a female expatriate could be an advantage in gaining the attention or respect of native managers.

Forster (1999) found differences in the international destinations to which British men and British women were assigned. He found a tendency for women to be assigned either to areas with well-established expatriate communities, or to areas where gender would not be regarded as an issue in terms of getting the work done or interacting with host-country nationals. Thus British women were particularly likely to be assigned to Western Europe and North America, and particularly unlikely to be assigned to the Middle East, the Indian subcontinent, Eastern Europe or Africa.

Forster (Ibid.) also found that women expatriates were more likely to be in junior management positions than men, and less likely to be entrusted with major projects in new markets.

He found few differences between men and women assignees in terms of their expectations, their adaptability to the foreign cultures and environments, or their effectiveness or performance overseas.

There is, apparently, no reason to suspect differences between the expectations of male and female international assignees. On the other hand there have been comparatively few studies of women international assignees, and our knowledge about female international assignees in general remains sparse.

Proposition 17: The work- and career-related expectations of male and female international assignees are not significantly different.

Marital Status.

Married assignees can avail themselves of the personal and social support that their partner provides, which may be presumed to assist the assignee's work-related achievement. On the other hand, organisations continue to blame

expatriate "failure" on the inability of the partner to adapt to a foreign assignment (see page 64). It may be assumed that work-related "success" or "failure" would influence the assignee's pre-return work- and career-related expectations.

Given speculative mechanisms by which the married assignee's partner may assist "success" on the one hand, or contribute to "failure" on another, a reasonable stance might be to take the middle ground by assuming that, on balance, married and single assignees do not have significantly different work- and career-related expectations.

Proposition 18: The work- and career-related expectations of married and single international assignees are not significantly different.

Partner encouragement.

The literature implies that partner encouragement to accept an international assignment enhances pre-expatriation motivation to accept the assignment (see page 57).

In addition, there is a suggestion that partner encouragement may be associated with higher levels of adjustment to the foreign culture and environment by both assignee and partner that may be presumed to lead to higher levels of performance and achievement during the assignment, and hence to higher levels of expectation at return.

Proposition 19: Partner encouragement to accept an overseas assignment will be associated with more positive assignee work- and career-related expectations.

Educational Qualifications.

The literature implies that assignees with higher educational qualifications are more likely to have been selected for an assignment having an individual or organisational development rationale (see page 57)

Proposition 20: Assignees with higher educational qualifications will have more positive work- and career-related expectations.

Previous Expatriate Experience.

The literature implies that individuals on their first expatriate assignment are more likely to have positive expectations of development and career enhancement (see page 58).

Proposition 21: Assignees on their first expatriate assignment will have more positive work- and career-related expectations than those on their second or subsequent international assignment

"Push" or "Pull" Motivation.

The literature indicates that assignees motivated by "pull" motives associated with learning and development are likely to have higher expectations than those accepting assignments for "push" motives associated with current dissatisfaction (see page 56).

Proposition 22: Assignees who accept an international assignment for "push" motives relating to dissatisfaction with one or more elements of their current job or career progression will have less positive career-related expectations than assignees who accept an international assignment for "pull" motives relating to learning and development.

This section continues to address the third research question by examining characteristics of the assignment itself.

The geographical destination

The literature indicates that different individuals will find different destinations more desirable and more "culture-tough" than others (see page 67). On the one hand, assignees in more "culture-tough" destinations may be less likely to adjust successfully and, as a result, may experience lower levels of performance and achievement leading to lower levels of expectation. On the other hand, the perception of what countries are "culture-tough" and what countries are not appears to be an individual phenomenon.

Gomez-Mejia & Balkin (1987) found the location of the host country to be a factor in repatriation, in that individuals returning from developed countries tended to be more satisfied with the repatriation experience than those returning from developing countries (see page 68).

Although this speculation is insufficient to indicate what differences may exist between the expectations of assignees destined for two given countries, or even two given geographical areas, it is sufficient to indicate that differences might exist.

In addition, Adler (1980) found that assignees who acquired cross-cultural skills while overseas and then attempted to use those skills after return to the home base were more likely to be deemed 'ineffective' by their peers. It may

be the case, therefore, that returnees from different countries or regions will be treated differently at reentry, and this may modify their expectations or return, or colour their longer-term expectations after return and reestablishment.

Proposition 23: The work- and career-related expectations of international assignees to different geographical regions will be statistically different.

The duration of the assignment

The literature implies that returnees from longer-duration assignments are more likely to experience problems, as the "out of sight, out of mind" syndrome has had more opportunity to allow the individual's expectations to drift uncorrected (see page 80). Since "unreasonable", "less accurate" expectations are taken to be "positive" expectations, it seems reasonable to assume that longer-duration assignments will be associated with higher levels of expectation immediately prior to return.

Proposition 24: The longer the actual duration of the assignment, the more positive the work- and career-related expectations of the returning international assignee.

Partner adjustment

"Failure of the partner to adjust" to the foreign culture and environment is frequently cited as the primary reason for the "failure" of an expatriate assignment. At the same time there is evidence of a positive relationship between the adjustment of the partner and the adjustment of the assignee. (See page 64).

It seems reasonable to assume that lower levels of "failure" will equate to higher levels of performance and achievement, leading in turn to higher expectations of reward.

Proposition 25: Partner international adjustment will be associated with more positive work- and career-related expectations of the assignee's return to the home organisation.

Presence of a significant expatriate community.

There is some evidence that the presence of a significant expatriate community in the host country provides an environment into which the assignee and partner may withdraw from the genuine host country

environment, providing a form of "adjustment" (see page 67). It is unclear whether this "adjustment" has the same effect as genuine "adjustment" but, if that was the case, it might be assumed that "adjustment to the expatriate community" would reduce failure, enhance performance and achievement, and lead to higher expectations of return.

Proposition 26: The existence of a significant expatriate community in the destination country will be associated with more positive work- and career-related expectations of the assignee's return to the home organisation.

Development and Learning

There is evidence that international assignees acquire valuable skills and experience. One reason that practitioners urge organisations to solve problems encountered during repatriation is that returnees who are dissatisfied with their reintegration into the home environment, yet recognise the skills and experience that they have acquired overseas, are likely to take that skill and experience to a competitor organisation (see page 81).

The implication, therefore, is that returnees who recognise that the overseas assignment has been a learning and developmental experience will develop more positive expectations of their return to the home organisation and home country.

Proposition 27: Assignees who recognise that the international assignment has been a learning and developmental experience will have more positive work- and career-related expectations of their return to the home organisation

The nature of the job following return.

It has long been stated that returnees are frequently into a job that they find disagreeable because it fails to reflect the levels of autonomy, responsibility or status that the individual encountered overseas. The literature also states that the job into which the returnee is placed fails to recognise or utilise the skills and experience that the assignee acquired overseas (see page 77).

It is at this point, when comparing their work-related expectations of extrinsic reward to reality, that the returned assignee can assess the effect that the international assignment has had upon their current job and immediate career situation.

It seems reasonable to assume that assignees who return to a job that satisfies their individual requirements for responsibility, autonomy and status, and that utilises skills and experience acquired overseas, would consider that their immediate career had been enhanced by the international assignment,

and would be more likely to generate positive expectations of the long-term effect of the international assignment upon their future career.

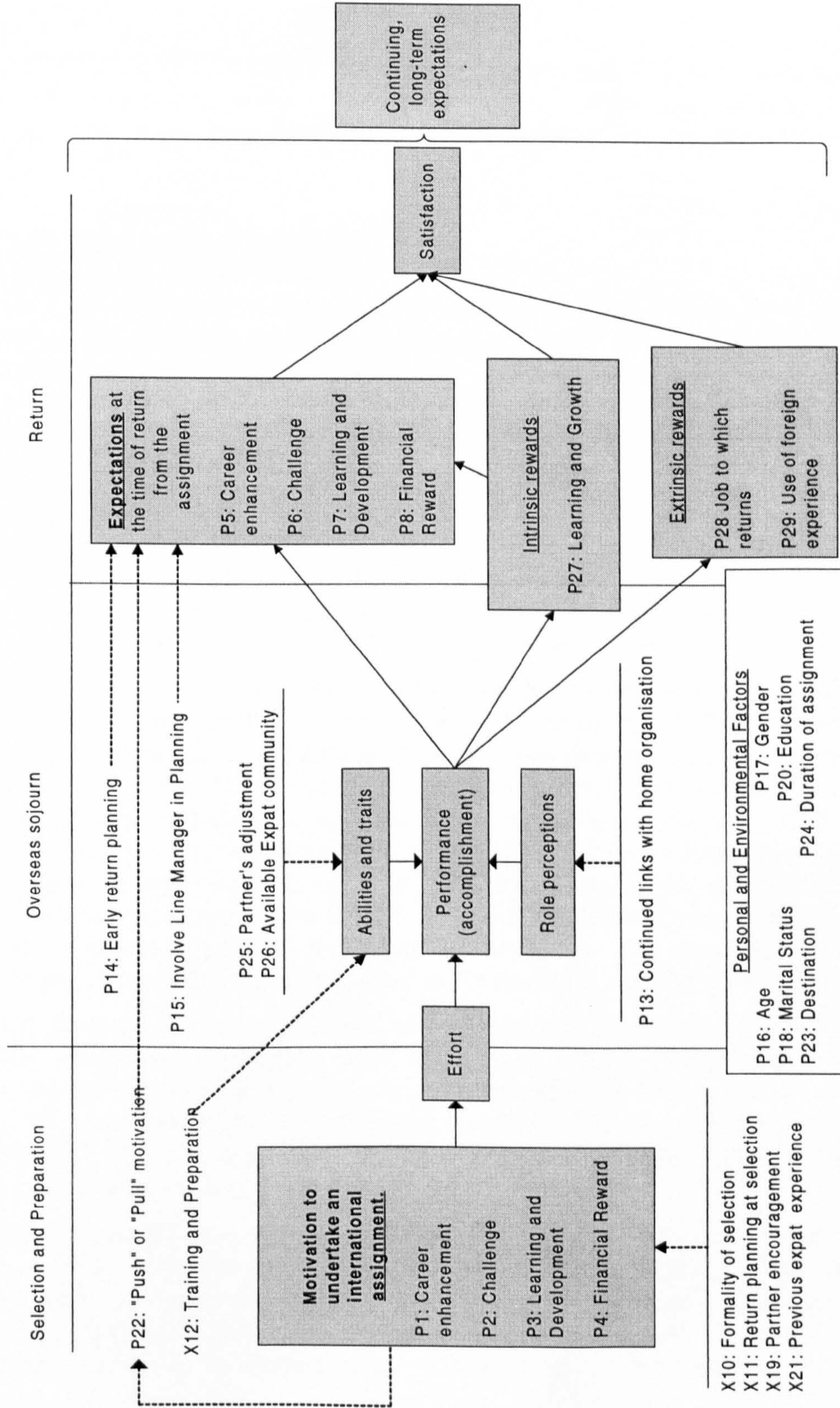
Proposition 28: International assignees who return to a job which satisfies their requirements for responsibility, autonomy and status will have more positive expectations of the effect of the international assignment upon their long-term career prospects.

Proposition 29: International assignees who return to a job which makes use of skill, learning and development acquired during the international assignment will have more positive expectations of the effect of that assignment upon their long-term career prospects.

(The fourth research question asks: "What relationships exist between factors affecting expectations?". It is unnecessary and inappropriate to formulate propositions to answer that question. Propositions 10 through 29 propose a number of factors that may affect expectation. In due course those factors will be quantified in order to test the propositions. Relationships between factors can then be sought and reported upon).

The propositions are shown in diagrammatic form, in terms of expectations theory in general, and the Porter and Lawler model in general, as follows:

Figure 3.8: Propositions



Chapter Four

Methodology

Chapter Four Methodology

4.1 Introduction

This chapter examines the research philosophy applied to this research by this researcher, and the research methods applied within that philosophy. The chapter then describes the research design and implementation in some detail.

4.2 Research Philosophy

Blaikie (1993) identified two key influences on the choice of a research strategy, the primary influence being the "world view" of the researcher, incorporating their personal preference for a philosophical position on the nature of social reality and how knowledge about it can be obtained, and the secondary influence being the pragmatic necessity to match a strategy to the research questions of a particular research project. As argued by Guba and Lincoln (1994:105):

"Questions of methods are secondary to questions of paradigm, which we define as the basic belief system or world view that guides the investigator, not only in choices of method but in ontologically and epistemologically fundamental ways".

Science refers to both a system for producing knowledge and the knowledge produced by that system. The system of science of the natural world embodied in physics, chemistry and biology has evolved over many years and is slowly but constantly changing. It combines assumptions about the nature of the world and knowledge, an orientation towards knowledge, and sets of procedures, techniques and instruments for gaining knowledge. Scientific knowledge is organised in terms of theories, being a set of interconnected abstractions or ideas which condense and organise knowledge. Scientists gather data as empirical evidence in order to test theories, which are confirmed, modified or rejected depending upon the outcomes of those tests.

Social science, however, studies the interactions of human beings. Human beings are clearly different from the stars, rocks, plants and chemical compounds studied by the natural sciences. Human beings think and learn, have an awareness of their past, and possess motives and reasons for their actions. As a result, a special science is needed for studying the social life of people (Neuman 1994).

Positivist social science - positivism - is widely used in the social sciences and seeks to apply the approach of the natural sciences to the study of human social activity. Positivism may be broadly described as an organised method for combining deductive logic with precise empirical observations of individual behaviour in order to discover and confirm a set of probabilistic causal laws

that can be used to predict general patterns of human activity. Within positivism, the primary aim of research is to learn more about how the world works so that events can be controlled or predicted. Both physical and social reality contain pre-existing regularities that can be discovered. Positivist explanations of social life are considered true when they have no logical contradictions and are consistent with the observed facts and, in addition, derive from measurements that can be replicated by other researchers (Hughes 1990).

Positivism therefore acknowledges the human traits of self knowledge and self motivation by asserting probabilistic, generalised patterns of human behaviour. Thus, while a theory in natural science would assert that *all* instances of a given element would react in a given way to a given stimulus (and just one contrary observation would suffice to negate that theory), a positivist theory recognises the human potential for variety and contrariness by asserting that *most* individuals within a given class of human beings would react in a given way to a given stimulus (Neuman 1994).

Interpretive social science views society as a product of the human mind, subjective and emotive as well as intellectual. The interpretive approach considers mechanistic and measurement models of explanation to be inappropriate on the grounds that human consciousness is not determined by natural forces.

Interpretivism considers that the purpose of research is to understand social life, to discover how people construct social meaning, to learn what is meaningful or relevant to people, and to learn how individuals experience their everyday lives. Within this paradigm, the social world is not out there waiting to be discovered: it is an accomplishment intentionally created out of the purposeful actions of interacting human beings and is largely, therefore, what people perceive it to be (Layder 1990).

Within interpretivism, a theory describes and interprets how people conduct their daily lives: it contains concepts and limited generalisations but does not dramatically depart from the experience and the inner reality of the people being studied. Thus an interpretive theory gives the reader a feel for another's social reality and an in-depth view of a social setting by revealing the meanings, values and rules of living used by people in their daily lives. An interpretive theory is considered true if it makes sense to those being studied, and if it allows others to understand or enter the reality of those being studied.

Whereas positivism sees facts as impartial, objective and neutral and assumes that neutral outsiders observe behaviour and see unambiguous facts, interpretivism takes this as a major question to be answered by research: How do people observe the ambiguities of social life and assign meaning? For this reason, interpretive researchers rarely ask objective questions, or claim to derive meaning by aggregating the answers of many people: each person's interpretation of a question must be placed in context, and the true meaning of a person's answer will vary according to the

questioning context. Since each person assigns a different meaning to both question and answer, combining answers produces, not more sense but nonsense.

The interpretive approach criticises positivism because it does not deal with the meanings of real people and their capacity to feel and think and does not take social context into account.

Critical social science agrees with these criticisms and, in addition, believes that positivism defends the status quo because it assumes an unchanging order instead of seeing current society as a particular stage in an ongoing process. Critical researchers criticise interpretivism for being too subjective and relativist, and for being passive. Critical researchers consider the purpose of social research to be the uncovering of the real structures and mechanisms that account for social relationships in order to empower people to build a better life for themselves. By contrast, critical researchers consider positivism as producing technocratic knowledge suitable for use by people in power to dominate and control other people, and consider interpretivist researchers to be detached from the world, more concerned with studying it instead of acting upon it (Neuman 1994).

The research questions within this particular study arose from consideration that the corporate management of international assignees was not always effective in producing maximum benefit to both organisation and individuals, and that the management process might be improved by the outcome of this research.

Since one object of the research is to enhance outcomes for both employer and employee, it is clear that the critical paradigm, in which the employee would be considered dominated and controlled by the employer, is inappropriate to this study. My intention is not that international assignees should cast off metaphorical chains to forge a new future for themselves, but rather that assignee and assignor should work better together for mutual benefit.

This study also embraces assumptions that management is more a science than an art, that patterns emerging from measurements on numbers of human individuals have meaning, and that those meanings may be applied to predict the outcomes of management decisions and actions (even if those predictions are couched in probabilistic and generalised terms).

It should be clear, therefore, that this study is undertaken under the umbrella of the positivist paradigm, which aligns most closely to the world view of this researcher and, probably as a result of that world view, provides a research strategy closely aligned to the research questions.

4.3 Research Methods

The positivist approach to research relies upon methods which derive and examine quantitative data (Neuman 1994) utilising the positivist natural science language of variables, hypotheses and causal explanations.

The **variable**, the central idea in quantitative research, is a concept that varies by taking two or more values or attributes. Thus gender (male or female) may be a variable, as may social status (upper, middle or lower class), or age (continuously variable upwards from zero). Researchers seeking causal relationships frequently start with an effect, then seek its causes. Variables are classified into three basic types, depending on their location in a causal relationship. The cause variable that identifies forces or conditions that act on something else is known as the independent variable. The variable that is the effect, the result or the outcome of an independent variable is the dependent variable. In more complex chains of causal relationships the intervening variable comes between independent and dependent variables, such that the intervening variable acts as a dependent variable with respect to the independent variable, and as an independent variable with respect to the dependent variable.

A **hypothesis** is a proposition to be tested: a tentative statement about the relationship between two variables. A causal hypothesis is generally expressed as a prediction or expected future outcome of a causal or cause-effect relationship containing at least two variables logically linked to a research question and a theory. A hypothesis must be falsifiable, that is, it must be capable of being tested against empirical evidence.

Hypotheses are never proved by scientific methods: the result of testing a hypothesis is one of three outcomes:

- The evidence clearly disconfirms or rejects the hypothesis, or
- The evidence partially supports and/or partially disconfirms the hypothesis, or
- The evidence clearly confirms or supports the hypothesis.

Hypotheses that are confirmed by numbers of independent researchers come to be generally accepted as probable causal explanations, although the most that scientists will say is that even though overwhelming evidence supports these hypotheses, there always remains the possibility that future research will contradict past findings.

Researchers fortunate to have more than one quantitative research method at their disposal would take into account the internal validity, external validity and reliability of data produced by each method (Neuman 1994; Gill and Johnson 1991).

Internal validity refers to errors internal to the design of the research project: high internal validity means that there are few such errors. Low internal validity

means that such errors are likely, and may be manifested by alternative explanations of results, or doubt as to whether what have been identified as 'causes' actually produce what have been interpreted as 'effects'.

External validity refers to the extent to which research findings can be generalised or extrapolated beyond the immediate research sample or setting: the degree to which it is possible to generalise beyond the sample of people involved in the research to a wider population, or from the actual social context in which the research has taken place to other contexts and settings.

('Validity' is an much used term, and an additional use of the word - Measurement validity - is the degree of fit between a construct and indicators of it. It refers to how well the conceptual and operational definitions of a variable mesh with each other. The greater the fit, the greater the measurement validity).

Reliability refers to the dependability and consistency of results obtained in research. A reliable indicator or measure gives the same result each time that the same thing is measured. To satisfy this criterion, it should be possible for another researcher to replicate the original research using the same subjects and the same research design under the same conditions. Additional types of reliability include *Stability Reliability* (does the measure deliver the same answer when applied at different time periods), *Representative Reliability* (does the indicator deliver the same answer when applied to different groups, subpopulations or classes) and *Equivalence Reliability* (if several indicators all measure the same construct, does the measure yield consistent results across indicators).

A number of methods are available for deriving the type of quantitative data required by the positivist approach, and these are discussed below.

The Experimental Method

The experimental method concerns itself directly with questions of causality, and consequently is much used in the natural sciences (Smith H. 1975). In the natural sciences it is commonplace to create hypotheses which both predict and describe the effects that one set of (independent) variables have upon another set of (dependent) variables. The purpose of an experiment is generally not to prove a hypothesis, but to disprove an alternative hypothesis. In designing an experiment the researcher:

- selects the subjects for the experiment;
- selects the values or categories of the independent variable(s);
- applies rules or procedures to assign subjects to the values or categories of the independent variables;
- specifies the observations or measurements to be made on each subject;
- manipulates one or more of the independent variables;

- measures the effects of this manipulation on the independent variables(s);
- controls all other variables (Ferguson 1976; Robson 1993).

In a laboratory experiment, the variance of all (or nearly all) of the possible influential variables not pertinent to the immediate problem is kept to a minimum. This is done by isolating the research in a physical situation apart from the routine of ordinary living, and by manipulating one or more independent variables under rigorously specified, operationalised and controlled conditions (Kerlinger 1986). The variable(s) which are modified by the experimenter are frequently known as the *treatment*, a term derived from medical research in which it is commonplace to experiment by providing treatment to one group of people while withholding treatment from another (very similar) group (Neuman 1994).

Such laboratory conditions are pertinent to the natural sciences, where variables may be tightly defined and accurately measured, where variables may be directly specified and varied by the experimenter, and where experimental subjects are inanimate. Under those conditions, experiments provide an environment which is readily replicated, and results which are readily repeatable by a number of independent researchers. The more alternative hypotheses that are repeatedly disproved by numbers of independent researchers, the stronger becomes the support for the primary hypothesis (Smith H. 1975).

In social science, however, isolation from "the routine of ordinary living" is frequently inappropriate because some aspect of ordinary living is likely to be exactly the subject of study. Field experiments, carried out in natural settings, have both advantages and disadvantages over laboratory experiments:

Generalisability: the laboratory is necessarily (and deliberately) an artificial setting. If the researcher's purpose is to generalise results into the real world, the task may become easier if experimentation takes place in that real world.

Control: the experimenter clearly has less control over extraneous variables in the real world, and the effects of such extraneous variables together with interaction of subjects with each other, and the interaction of subjects with the external world and the people in it, may be sufficient to mask or bias any effects by the provision or withholding of treatment.

Random Assignment: there are likely to be both practical and ethical problems associated with assigning treatment to some individuals and withholding treatment from others in the real world (whether "treatment" is genuine medical treatment, or simply the deliberate manipulation of environment variables). Such problems arise if the provision or absence of treatment is (or is perceived to be) advantageous or detrimental, or desirable or abhorred. These problems may make it difficult or

impossible to assign and withhold treatment in a genuinely random fashion. Some researchers use generally experimental techniques while knowingly allocating and withholding treatment in a non-random fashion in an attempt to liberalise the experiment and to extend its use to cope more realistically with conditions outside the laboratory. Such techniques are generally referred to as quasi-experimentation.

Validity: the actual treatment in the real world may be an imperfect realisation of the variables involved, or the outcomes may be restricted in range or may prove to be imperfectly measurable. Subjects supposedly receiving no treatment may, in the real world, receive some form of compensatory treatment outside the control of the experimenter. On the other hand, subjects involved in laboratory experiments, recognising the artificiality and isolation of the laboratory, may in turn react artificially to laboratory stimuli.

Subject Availability: it is frequently difficult to entice subjects into a laboratory situation. By contrast, many real life experiments have actual or potential subjects in abundance (Robson 1993).

A typical experiment thus proceeds as follows. Subjects are assigned randomly to either the experimental treatment group or to the comparison control group. The effect of the treatment is assessed by statistical analysis to determine the probability that observed differences between the groups occurred by chance. If that probability is sufficiently small, the decision is made that the experimental treatment had the observed effect.

The highly structured nature of experimental research designs, with their identification and manipulation of independent and dependent variables, and assignment of subjects to control and experimental groups, generally gives this approach high levels of internal validity and reliability. The artificial nature of the process, however, may lead to low levels of external validity.

Survey Methods

Survey methods include both interviews and questionnaires. Although survey methods may be appropriate to derive both qualitative and quantitative data, they are more frequently encountered in situations where quantitative data is required. In general, data captured by a descriptive survey is primarily concerned with addressing the particular characteristics of a specific population, while data captured by an analytic survey attempts to test a theory by taking the logic out of the laboratory and into the field. Survey research has been developed within the positivist approach to social science in order to produce quantitative information about the social world (Neuman 1994).

That surveys are nearly always concerned with providing a quantitative picture of the individuals concerned, with emphasis on quantification, on variables, and on sampling from known populations, shows how survey researchers tend to share a similar scientific view of the nature of the research task to that adopted by researchers using experiments (Robson 1993).

An interview is a peculiar verbal interactional exchange in which one person (the interviewer) attempts to elicit information, expressions of opinions or beliefs from another person or persons (Smith H. 1975).

Interviews vary considerably in their structure or standardisation: a loosely structured interview may allow the course of the discussion to roam almost at will across a broad canvas; a semi-structured interview will attempt to ensure that a number of particular questions are asked and answered, while a highly-structured interview may be so highly standardised that the interviewer works from a schedule of questions which must be asked in exactly the same order and wording, perhaps even in the same tone of voice. The reason for this high structuring is to present all respondents with the same stimuli so that they are responding to the same research instrument.

A questionnaire is a self-administered interview which requires particularly self-explanatory instructions and question design, since there is usually no interviewer present to interpret or clarify the questionnaire to the respondent.

Robson (1993) identifies a number of advantages and disadvantages for survey methods. They can provide a relatively simple and straightforward approach to the study of attitudes, values, beliefs and motives, and may be adapted to collect generalisable information from almost any human population. However, data are affected by characteristics of individual respondents such as memory, knowledge, experience, motivation and personality. In addition, respondents will not necessarily report their beliefs and attitudes accurately if those beliefs and attitudes are known to be socially undesirable: people often respond in a way that shows them in a good light.

Interviews have the advantage that the presence of the interviewer can serve to clarify questions, to encourage participation and involvement, and to judge whether the respondent is treating the exercise seriously. On the other hand, data captured by interview may be affected by characteristics of the interviewer (such as motivation, personality and experience), and there may be interviewer bias, where the interviewer can (sometimes unknowingly) influence the responses by verbal or non-verbal cues indicating 'correct' answers. The presence of the interviewer may cause respondents to feel that their answers are not anonymous, making them less open and forthcoming. Finally, data may be affected by the interaction of interviewer and interviewee, particularly where they come from different class, social or ethnic backgrounds.

A postal (or other self-administered) survey may be the only (or the easiest) way of retrieving information about the past history of a large set of people, and may be extremely efficient at providing large amounts of data cheaply and quickly. While this appears advantageous, it may prove to be disadvantageous if it seduces the researcher into using a survey when it is not the most appropriate research mechanism. Postal surveys provide anonymity, which can encourage frankness and openness, but this very anonymity means that ambiguities in survey questions and misunderstandings of survey questions

may go undetected, as may respondents who choose to treat the exercise frivolously. Finally, postal surveys frequently have a low response rate: as a result the sample of respondents is not random (because respondents select themselves), and because the researcher does not usually know what characteristics separate respondents from refusers, it may be unclear whether the population of respondents is representative of the population as a whole.

The structured nature of questionnaire research generally provides information which is reasonably replicable and hence reliable. This very structure, however, can tend to constrain or impel the respondent into statements which fit into the concept of the researcher, so that external validity may be low. Internal validity may also be low because the use of statistical controls and multivariate analysis to control extraneous variables may detect correlations, but correlation does not prove causation.

Content Analysis is a technique for examining the information which is present in written or other symbolic material such as pictures, movies or song. The researcher identifies a body of material to analyse and then creates a system for recording specific aspects of that material: this may include counting how often certain words or themes occur, or how often one word occurs in conjunction with another. Finally, the researcher records what is found in the material. This technique allows the researcher to discover features in the content of large amounts of material that may otherwise go unnoticed. Content analysis may be appropriate to both exploratory and explanatory research, but is most often used in descriptive research (Neuman 1994). Smith H. (1975) indicates that content analysis may provide qualitative data by concentrating upon forms of content and patterns of forms, or may provide quantitative data by concentrating upon durations and frequency of forms.

In **Existing Statistics Research**, the researcher locates a source of previously collected information such as government reports, or previously conducted surveys. The researcher then reorganises or combines the information in new ways to address a research question. Validity problems may arise where the researcher's theoretical definitions do not match those of the agency that collected the information. In any event, the data gathering process is outside the control of the researcher, and systemic errors in that process are unlikely to be identified. Similarly with reliability: stability reliability problems develop when official definitions or methods of data collection change, while representative reliability may be a problem if some subpopulations are over- or under-represented in the data.

The research questions in this study, formulated in Chapter 3 above, are restated here:

- 1. What work- and career-related expectations do individuals generate before, during and after an expatriate assignment?**
- 2. How are those expectations affected by organisational actions?**
- 3. What other factors affect those expectations?**
- 4. What relationships exist between factors affecting expectations?**

It may be seen immediately that question 1 (which enquires what expectations are generated by individuals at different phases of an expatriate assignment) is not suitable for investigation by experiment. This researcher has already carried out a limited, informal content analysis by examining the literature in the field, and in so doing has determined that very little empirical data exists upon this subject. During this literature review, no significant existing statistics have come to light. The remaining research method - survey - is, however, eminently suitable to capturing data about individual subjects which is suitable for statistical analysis leading to generalisations which may be extrapolated beyond the research sample into a wider population.

Questions 2, 3 and 4 ask about relationships between variables. The questions are not posed as hypotheses, however. Instead, it is implied that a number of variables exist, and that relationships exist between those variables that may be causal. These research questions are clearly exploratory, not explanatory, although answers to these questions may permit explanatory hypotheses to be built in due course. Accordingly, these questions are clearly not capable of being answered by experiment. The previous paragraph indicates that existing sources and statistics suitable for content analysis or statistical analysis do not appear to be available. Once again, however, a survey is eminently suitable for capturing data about numbers of variables, data that may be statistically analysed for relationships between variables. That any relationships that emerge from the data may not necessarily be causal is not of overriding importance, since this can be the subject of later research.

The research questions within this study will, therefore, be investigated by capturing data by survey, and by subjecting that data to statistical analysis. That investigation is described in some detail later in this chapter.

I considered it more appropriate to seek answers to these questions by surveying the international assignees themselves, rather than their employing organisations, for a number of reasons:

- the study focuses upon the motives and expectations of international assignees: being internalised within the mind of the individual, who better than the organisation is better placed to report upon them;
- the organisation is continuously involved in the expatriation processes of many expatriates, while the individual expatriate is intimately involved in only one - his or her own;
- the interactions between the individual assignee on the one hand and the organisation on the other are diffused across a number of organisational positions and departments liable to change during the lifetime of the assignment. During the same period, these interactions all involve and concentrate upon the individual assignee;
- where the study enquires about the action taken by organisations and the effect of that action upon the internal perceptions of the individual, organisations may report upon what *should* happen (according to the strategy or policy in place at the time), or may report what is recorded in the files (since the individuals concerned have moved on), or may simply be unaware of what action did or did not take place. The individual is once again better placed to report, not only what action did or did not take place, but also to judge and comment upon that action or inaction in his or her own terms.

For these reasons, the survey questionnaires were designed to capture data from individual international assignees.

4.4 Assignee survey

4.4.1 Sources of International Assignees

There is no central register of British expatriates. Some foreign governments require their expatriates to register for income tax purposes, while others monitor the exit and return of their nationals: the British government does neither. This ruled out the possibility of selecting a random sample of expatriates from a central register.

There is a small number of periodicals dedicated to and targeted at the expatriate, and I considered advertising in these, requesting expatriates to volunteer to take part in a survey. I was aware, however, that volunteers would thus declare themselves 'different' from non-volunteering expatriates from the outset, and therefore might not be typical of expatriates in general. I was also aware that the readership of such publications is likely to include virtually any British person resident abroad, including career expatriates, permanent

residents abroad, mobile contractors, public assignees and voluntary workers, whereas I wished to target a more specific audience of corporate employees and, in addition, wished to target those who had returned, not those who were still on assignment.

I considered approaching a number of expatriate-employing organisations, seeking their assistance in surveying the expatriates which they employed. I was already aware, however, that organisations would be unlikely to present me with names and addresses of returned expatriates, but might consider distributing questionnaires internally. There was a danger, however, that organisations might be tempted to exclude 'problem' returnees, and might resist extending the distribution to returnees who had resigned or otherwise left the organisation. I was also aware that by pre-selecting participating organisations I might introduce some bias into the resulting expatriate sample.

4.4.1.1 The Centre for International Briefing

It was while considering how best to obtain a sample of expatriates that I became involved with The Centre for International Briefing ('CIB') at Farnham Castle. The CIB provides cultural, political and environmental briefings for expatriates prior to their departure overseas.

In particular, the CIB provides Country Briefing Courses "*to ensure that course members understand the country and people in order to make an effective transition to both the working and cultural environment of their country of interest*", and wished to determine the effectiveness of those courses. We agreed to undertake an appropriate study which would include a questionnaire survey of all expatriates who had attended Farnham Castle over the previous four years. We also agreed that the resulting questionnaire could include questions aimed exclusively at my own PhD research, should I so wish.

Since the duration of expatriate assignments generally lies between one and three years, the 'CIB sample' would include a proportion of expatriates who had already returned from their assignment. It would contain expatriates from a significant number of employing organisations, and would not contain any bias of my own making. The 'CIB sample' would be biased, however, in this respect: that all expatriates within this sample would have received pre-departure cultural training.

4.4.1.2 Cranfield MBA students

One further source of expatriates occurred to me: past MBA students at Cranfield School of Management. Cranfield issues yearbooks of MBA students which include sufficient biographical data to determine whether they have expatriate experience. I determined, by informal conversation with one MBA course, that a sample drawn from this population would be biased in the following sense: that a substantial proportion of this population had left their employing organisation specifically to undertake the MBA course.

4.4.1.3 Interviewed Organisations

I intended to interview the personnel managers of a number of organisations to determine their expatriate management policies. I decided that, at the conclusion of each interview, I would seek further assistance by asking them to distribute survey questionnaires to their recently-returned assignees. In an attempt to minimise the danger of bias (whereby organisations might be tempted to exclude "problem" assignees from the survey) I determined to explain this danger to the interviewees and, building upon the personal rapport achieved during the interview, seek their assurance that no such deliberate exclusion would take place. Only if I received such an assurance would I proceed further.

4.4.1.4 Summary: Sources of International Assignees

Not able to perceive a population of expatriates capable of delivering an unbiased sample, therefore, I chose to utilise three 'samples of opportunity' as follows:

- (a) by taking advantage of the 'CIB sample',
- (b) by utilising the Cranfield MBA population, and
- (c) by enlisting the assistance of expatriate-employing organisations.

By drawing expatriates from a number of sources the overall sample would be more likely to represent the entire population of expatriates than a sample drawn from a single source.

4.4.2 Questionnaire Design

Collaboration with the Centre for International Briefing provided access to a known population of international assignees, but brought with it the obligation to include a section within the survey questionnaire to address questions of specific interest to the Centre.

In addition, the questionnaire would be required to address the 29 propositions developed in Chapter 3 above. It was clear, therefore, that the questionnaire would be sizeable, and it would be important to design the questionnaire to be clear and easily comprehensible, in order to encourage international assignees to participate in the survey.

The questionnaire was therefore divided into two major sections: Section A for completion by the international assignee, and Section B for completion (where appropriate) by the assignee's partner.

Section A (for the international assignee) was divided into sections that mirrored the progress of an international assignment, as follows:

1. "General Information" which asked the international assignee about individual and personal characteristics such as gender and age.
2. "Selection for the Expatriate Assignment"
3. "Preparation for the Expatriate Assignment"
4. "Assessment of Farnham Castle Briefing"
 (N.B.: The questions in this section were developed by the Centre for International Briefing for their own purposes. It runs to 7 pages in the final questionnaire. The answers to these questions are of no interest to this study. The facsimile of the final questionnaire that appears in Appendix B does not include this section.)
5. "Expatriate Links with the Corporate Home Base"
6. "Return from the Expatriate Assignment"
7. "Reintegration into the Home-Base Environment"

Section B (for the assignee's partner) was divided into sections as follows:

1. "General Information" which asked the partner about individual and personal characteristics such as gender and age.
2. "Assessment of Farnham Castle Briefing".
 (N.B.: The questions in this section, which run to 6 pages, were developed by the Centre for International Briefing for their own purposes. The answers to these questions are of no interest to this study. The facsimile of the final questionnaire that appears in Appendix C does not include this section.)
3. "The Expatriate Experience"
4. "Return from Assignment"

Motivations and Expectations

Propositions 1 through 9 are concerned with motivations and expectations generated by the international assignee before, during and after the assignment.

Questions were developed to present the participant with a statement about expectation, and ask the participant to agree or disagree with that statement on a 5-point Likert scale:

- 1 Strongly Disagree 2 Disagree
 3 Neither Agree nor Disagree
 4 Agree 5 Strongly Agree

This technique (making a statement, and asking about agreement or disagreement with that statement on a Likert scale) proved useful in the development of many other questions. It was intended that posing many questions and answers in a consistent fashion would shorten the learning curve for participants, and encourage more of them to complete and return the questionnaire. It was also intended, by this technique, to obscure the focus of the questionnaire from the participant. By placing a number of disparate statements-as-questions upon a page, it was intended that the participant would not easily determine that the primary purpose of the questionnaire was to investigate expectations.

Questions-as-statements combined with a 5-point Likert scale "Strongly Disagree" to "Strong Agree" is not uncommon in the literature: a good example of its use occurs in Adler (1980), where it allows a large number of easily-understood, easily answered questions to appear upon a page.

The questions-as-statements that were developed about expectations are listed below:

Figure 4.1 Questions about Expectations

Questionnaire Section	Question Number	Statement	Abbreviation
2. Selection for the Expatriate Assignment	2.8b	I expect the assignment to be financially rewarding	Money Motive
	2.8c	I expect the assignment to be challenging and/or exciting	Challenge Motive
	2.8j	I expect to learn from the assignment	Development Motive
	2.8d	I expect the assignment to enhance my career prospects	Career Motive
6. Return from the Expatriate Assignment	6.7a	I expect the return to my home base to be financially rewarding	Money Expectation
	6.7b	I expect the return to my home base to be exciting and/or challenging	Challenge Expectation
	6.7c	I expect the return to my home base to provide skill or experience that I lack	Development Expectation
	6.7d	I expect the return to my home base to enhance my career prospects	Career Expectation
7. Reintegration into the Home-Base Environment	7.1n	The expatriate assignment has enhanced my long-term career prospects	Long-Term Expectation

The selection process

Proposition 10 addresses the formality of the selection process.

Three questions were developed accordingly. Question 2.11 simply asks the participant to rate the formality of the selection process as "Generally Informal", "Both Formal and Informal" or "Generally Formal". Questions 2.12 and 2.13 ask about the organisational departments that were involved in the selection process, and about the department that made the final selection decision.

Repatriation planning and discussion at the time of selection

Proposition 11 addresses the extent to which the eventual repatriation to the home base was planned or discussed at the time of selection.

Question 2.10 presented the participant with a list of subjects that might have been discussed between assignee and organisation at the time of selection, and asked the participant to determine whether each subject had been discussed on the 3-point scale "Not at all", "To some extent" or "In Depth".

The subjects included such short-term issues as the duties of the assignee during the foreign assignment, or the foreign culture. It also included more long-term issues such as the assignee's career prospects, or the job that the assignee would occupy on eventual return from the assignment.

The intention was to distinguish between discussion between assignee and employee about any subject whatsoever, and discussion that covered specific subjects indicating that the eventual return to the home base had been considered and/or planned at the time of selection.

Training and Preparation

Proposition 12 addresses the provision of pre-departure training and preparation for the assignment.

The literature suggests that some international assignees receive little or no training or preparation for the assignment because there is insufficient time between selection and departure to allow for training: to check this assertion, question 3.1 asks how much time elapsed between selection and departure.

Questions 3.2 and 3.3 ask whether language or cultural training, familiarisation visits, or meetings with returnees were provided to the assignee or (where appropriate) to the partner or children. In addition, the assignee is asked whether job-specific training was provided, or whether a temporary training or familiarisation assignment preceded departure.

Continued contact between assignee and organisation during the assignment.

Proposition 13 addresses continued contact between assignee and home-based organisation.

Questions 5.1, 5.2 and 5.4 ask about the frequency with which the assignee returns to the home base on business visits, or is visited in the assigned country.

Question 5.3 asks about the availability of "a specific person or department" with whom the assignee can discuss his or her career within the organisation.

Question 5.5 asks about the mechanisms by which assignee and home-based organisation remain in contact.

Question 5.6 asks about the effectiveness of communication in keeping the assignee informed about personnel changes, job opportunities, and the aims and strategies of the organisation.

Question 5.7 asks about the provision of a formal performance appraisal system.

Planning the return and reestablishment.

Proposition 14 addresses planning and preparation for the return to the home base. Proposition 15 addresses the involvement of the assignee's departmental line manager in planning and preparing for the return.

Question 6.6 asks what organisational departments were involved in pre-return discussion and planning.

Question 6.8 asks how much the assignee knew about the job to which he or she was about to return.

Question 7.2 asks about post-return discussion, including debriefing, and continued career-related planning

Question 7.4 asks what departments were involved in post-return discussion.

The literature refers to a number of ad-hoc solutions to which organisations sometimes resort to overcome "the problem of repatriation". Questions 7.5 and 7.6 ask whether the return was characterised by extended leave, a temporary assignment or an unsuitable assignment (indicative of a "holding pattern"), and ask how much time elapsed between return and the final settled position.

Individual Characteristics

Proposition 16 addresses the assignee's age, proposition 17 the gender, proposition 18 the marital status, proposition 20 the educational qualifications, and proposition 21 the assignees previous expatriate experience.

Questions 1.2, 1.6, 1.7, 1.8 and 2.7 elicit this information.

Partner Encouragement

Proposition 19 addresses the partner's encouragement or discouragement to accept the assignment

Partner's question 1.8 elicits this information from the partner.

Motivation

Proposition 22 addresses the motivation which leads an individual to accept an international assignment.

Several questions had already been developed to ask the assignee about specific expectations: financial reward, challenge, personal development, and career enhancement. While scholars may differentiate between motives and expectations, to lay persons they may often appear to be so similar as to be one and the same. It seemed dangerously confusing, therefore, to ask participants about specific motivations, when they had already been asked about specific expectations.

Accordingly, question 2.9 is an open question that asks "In your own words, please explain why you accepted this assignment".

Geographical destination

Proposition 23 addresses the geographical destination of the assignment.

This information is elicited in question 2.5

Duration of the assignment

Proposition 24 addresses the duration of the assignment.

Question 2.6 asks whether the duration of the assignment was defined at the time of selection and, if so, elicits the planned duration.

Question 6.1 elicits the actual duration of the assignment.

Partner's international adjustment

Proposition 25 addresses the partner's international adjustment.

Partner's question 3.6 lists 12 aspects of the host culture and environment, and asks the partner to determine the extent of their adjustment to each aspect on a 5-point Likert scale "Very Difficult", "Difficult", "Neither Easy nor Difficult", "Easy", "Very Easy".

The list is based on a sub-set of measures used by Black and Stephens (1989) to study expatriate and partner international adjustment.

Presence of an expatriate community

Proposition 26 addresses the existence of a significant expatriate community in the host country.

This information was elicited from the assignee's partner, because the subject is associated with international adjustment, which has itself been elicited from the assignee's partner.

Partner's questions 3.3 and 3.4 ask about the significance of the expatriate community, and ask the partner to determine how social activity is divided between host nationals and the expatriate community.

Development and Learning during the assignment

Proposition 27 addresses the extent to which assignees recognise the assignment as having been a developmental experience.

Questions 6.4a, 6.4b, 6.4c, 6.4d, 6.4e and 7.1l ask the assignee to what extent the assignment provided additional levels of autonomy or responsibility, additional managerial experience, enhanced specialist expertise, and potential utility to the home-based organisation.

Job Satisfaction

Proposition 28 addresses the assignee's satisfaction with the job to which he or she has returned.

Questions 7.1a, b, d, e, f, and g invite the participant to agree or disagree with a series of statements about satisfaction with the job's status, suitability, autonomy, responsibility and geographical location.

Questions 7.1e and 7.1g deserve some explanation. The literature implies that returnees are frequently dissatisfied with the low levels of autonomy and responsibility that their new job provides: questions 7.1d and 7.1f ask the participant to agree or disagree with "I am satisfied with the autonomy that my job provides" and "I am satisfied with the responsibility that my job requires".

There remains the (at least theoretical) possibility, however, that participants who express dissatisfaction with autonomy or responsibility do so, not because they encounter too little but too much.

As a check against this possibility, therefore, questions 7.1e and 7.1g invite participants to agree or disagree with "My job gives me more autonomy than I would like" and "My job carries more responsibility than I would like".

Utilisation of skills and experience acquired overseas.

Proposition 29 addresses the extent to which the returnee is able to utilise skills and experience acquired overseas in the new job.

Question 7.1h asks participants to agree or disagree with the statement "My job allows me to make use of the experience that I acquired in the expatriate assignment".

Sample Homogeneity

The way that the "assignee" required to take part in this study is defined is described on page 39. To avoid the danger that other types of international sojourner might be included in the study sample and thus pollute the data, a number of questions were included that would differentiate between "wanted" and "unwanted" responders:

Question 1.3 asks participants their nationality. Only British participants would be allowed into the final sample, so that cultural variations might be avoided.

Question 1.5 asks participants if they have actually completed and returned from an international assignment. Those who had yet to depart, or who were still on assignment, would be rejected from the sample.

Question 2.2 asks participants for their employment status at the time they were selected for the assignment. Those who had been in employment with their expatriating organisation at the time of selection would be included in the sample. Those who had joined the organisation specifically for, or immediately prior to the international assignment, would be rejected

Question 2.3 asks participants how they were recruited for the international assignment. This serves as a backup question to 2.2 (see above), in that only individuals that had been recruited internally within the expatriating organisation would be included in the sample.

Question 2.4 asks participants what they expected to happen at the end of the international assignment. Only those who expected to return to employment within the expatriating organisation would be included in the sample.

4.4.3 Pilot

An initial draft questionnaire was produced and piloted by ten Cranfield MBA students having expatriate experience. Although they were unable to attempt to answer those questions which dealt directly with the Centre for International Briefing courses, they provided valuable information about layout and structure, and gave some estimate of the time that they had required to complete the questionnaire.

Their major criticism was that the size of the questionnaire was so daunting that many had been tempted not to complete it. They suggested that by producing Section A (for the assignee) and Section B (for the assignee's partner) as completely separate documents, each section individually would appear to be of reasonable size. They suggested a secondary advantage of

splitting one large questionnaire into two smaller ones: that assignees without a partner, and assignees whose partner failed to participate in the survey could simply discard the partner questionnaire rather than returning it empty, thus saving on return postage costs.

Finally, by producing the "Expatriate" and "Partner" questionnaires as separate documents, expatriates and partners would be more likely to complete their respective questions without reference to their partner's responses, thereby reducing potential common method variance problems.

Accordingly, the questionnaire was split into two sections, clearly marked "Expatriate Survey" and "Expatriate Partners Survey"

The second draft of the (now two) questionnaires was presented to the Centre for International Briefing, who suggested some minor modifications to the "CIB" sections.

The third draft of the questionnaires was agreed and approved by the Centre for International Briefing.

4.4.4 Questionnaire production

The content of the questions having been decided, the remainder of the questionnaire was designed and produced to comprise the following elements:

- a front cover describing the survey and its purpose
- a brief description of Cranfield School of Management, its primary aim, and its interest in primary research.
- instructions for the responders
- the questions themselves
- blank pages for open-ended comment by the responders

I created individual questionnaire pages using Microsoft's Excel package. Although Excel is primarily a spreadsheet application, it allows a variety of typefaces, fonts, lines, boxes and shading to be placed upon the printed page. The package allowed me to distinguish instructions, questions and responses by font, and to place differently-shaped response boxes onto the page as appropriate for tick-boxes, numerical responses and open-ended responses.

Each page was then used to create a PostScript file.

Cranfield's printer used the PostScript files to produce zinc masters from which the questionnaires were printed. The printer also collated the sheets, added the covers and stapled them together.

The questionnaires were then made up into sets, each set comprising:

- the expatriate questionnaire, stamped with a distinguishing serial number
- the partner questionnaire, stamped with the same serial number as the accompanying expatriate questionnaire
- an accompanying letter, individually signed
- a pre-addressed envelope (free of postal charges if posted in the UK) for the return of the questionnaires

with the entire set placed inside a plain envelope bearing the same serial number as the enclosed expatriate questionnaire.

4.4.5 Questionnaire distribution

4.4.5.1 The CIB sample

The Centre for International Briefing keeps registration forms for its past students for several years, although they were not filed systematically at this time. I extracted registration forms from their basement archive, sorted them into approximate date order, then cross-referenced them with CIB central records in order to discard registration forms for students who had subsequently cancelled or simply not attended the course for which they had registered.

Valid registration forms were then entered into a computerised database, recording as much of the following data as appeared:

- the name of the student
- the name and address of his sponsoring company and department
- the student's name and address in the home country
- the student's address in the assigned country.

This database was then printed and passed to the CIB. The CIB contacted each sponsoring organisation to check the accuracy of this information. In the majority of cases the sponsoring organisation volunteered to distribute the questionnaires through their internal mail systems. In any event, the database was modified to conform to the latest available data, one label was printed for each entry and affixed to the envelope containing a questionnaire set: the serial number of that set was noted and entered into the database. The enveloped sets were then sent to the sponsoring organisation for distribution.

Return arrangements

Questionnaires were accompanied by a pre-addressed FREEPOST questionnaire for use in the UK. No economical method was available for providing free postal facilities for those expatriates still overseas: they were requested to make use of their organisation's postal facilities where possible,

failing which they were requested to bear the cost of the return postage themselves.

Acknowledgements

Each returned questionnaire was acknowledged by a signed 'thank you' letter, individually addressed by utilising the data stored in the database.

Reminders

Because each questionnaire bore an individual serial number it was possible to determine which expatriates had responded and which had not. Reminder letters were sent to any expatriate who did not respond within six weeks, using the name and address held in the database. Recipients of reminder notices who reported that they had not received the original questionnaires were sent an individual letter thanking them for their interest and a new set of questionnaires bearing a special range of serial numbers in order to avoid duplicate responses.

4.4.5.2 The Cranfield MBA sample

Past Cranfield MBA students whose yearbook entry indicated a probability of expatriate experience were sent an unsolicited questionnaire to their last known address, together with an individually signed letter requesting that they assist a current member of their alma mater by responding. Reminder letters were sent to non-responders, and "thank you" letters sent to responders.

4.4.5.3 The interviewed organisation sample

At the conclusion of each interview with an organisation's personnel manager I asked for their assistance in distributing questionnaires to their returned expatriates. Most agreed to assist although, as I expected, none offered to supply names and addresses of returnees but instead agreed to distribute questionnaires internally. Each participating organisation estimated the number of returnees which they could reach in this way, and were sent the appropriate number of questionnaire sets, having serial number ranges which could identify the participating organisation. "Thank you" letters were sent to all responders, and the personnel managers thanked for their assistance and co-operation.

4.5 Data Analysis

4.5.1 The approach to data analysis

4.5.1.1 Introduction

The analysis of research data comprising hundreds of cases and large numbers of variables would be difficult, time-consuming, or impossible without the assistance of the now-ubiquitous personal computer, together with sophisticated statistics packages. This research data for example, has been analysed with the assistance of SPSS for Windows, a package which employs a friendly, graphical, point-and-shoot front end which requires little or no understanding of the package's internal command structure or procedures.

The ease and speed with which large numbers of statistics may be extracted from raw data, however, makes it imperative that the researcher understand, if only to a limited extent, the principles upon which the statistics are based. The researcher lacking this understanding can, easily and quickly, make use of inappropriate tools and statistics and thereby reach untenable conclusions.

The primary function of PhD research is to provide a learning experience to the researcher. The analysis of data captured during this research project required the application of several sophisticated statistical procedures, and, for the reason given in the preceding paragraph, required this researcher to investigate the mathematical reasoning behind those procedures.

The remainder of this chapter defines the terms and describes the procedures which have been used to analyse the data captured in this research.

4.5.1.2 Basic Definitions

Statistics: a set of analytic techniques that can be applied to data to help in making judgements and decisions in problems involving uncertainty.

Descriptive statistics: consists of procedures for (1) tabulating or graphing the general characteristics of a set of data and (2) describing some characteristics of this set, such as measures of central tendency or dispersion.

Inferential Statistics: consists of a set of procedures that helps in making inferences and predictions about a whole population based on information from a sample of the population.

Deductive statistics attempts to deduce properties of a given sample based on known characteristics of the population.

Inductive statistics infers properties of a population based on observations of a selected sample of the population.

A statistical **population** is the set or collection of all possible observations of some specific characteristic. A sample is a portion of a population.

The **sampling design** is the set of decisions that must be made before the data are collected.

An **elementary unit** is a person or object on which a measurement is taken. A listing of all elementary units in a given problem is a frame.

A **convenience sample** is obtained by selecting elementary units that can be acquired simply and conveniently.

A **judgement sample** is obtained by selecting elementary units according to the judgement, intuition and discretion of the sampler.

A **random sample** (also known as a probability sample) is obtained if every member of the population has an equal chance of being selected for the sample.

A **data value** is a single measurement, such as an employee's age. An observation is a set of data values for the same elementary unit. A characteristic being observed is called a variable. Thus a variable is a set of data values regarding a particular characteristic.

A **quantitative variable** measures a characteristic which may be expressed numerically, such as age, number of children, or length of assignment.

A **discrete quantitative variable** may only assume certain values in a range: for example, the number of children in a family. A continuous quantitative variable may assume any value in a given interval: for example, the length of a piece of string.

A **qualitative variable** measures a non-numeric characteristic such as gender, colour of eyes or marital status.

A **nominal qualitative variable** has values which serve simply as labels: no assumptions may be made about relations between values. Thus the coding scheme

1	=	Male
2	=	Female

does not imply that "Female" is 'bigger' or 'better' than "Male", nor that one female is equivalent to two males.

An **ordinal variable** represents categories that may be ranked or ordered. Thus the coding scheme

1	=	primary education
2	=	secondary education
3	=	university degree

is an ordering representing increasing levels of educational achievement: in this sense "3" is higher than "2", and "2" higher than "1". Nothing is known, however, about the distance between "1" and "2": it is not necessarily the case

that moving from primary to secondary, and from secondary to university represent equal increments.

Interval measurements, in addition to having the property of order, have a meaningful distance between values. For example, the additional amount of heat required to raise the temperature of an object from 20 to 21 degrees Celsius is identical to that required to raise the temperature from 30 to 31 degrees Celsius. An interval scale lacks an inherent zero point (the "0" of the Celsius scale is arbitrary). It is not true to say, therefore, that 40 degrees Celsius is "twice as hot" as 20 degrees.

Ratio measurements have the ordering and distance properties of an interval scale, and have additionally a meaningful zero point. This allows meaningful ratio comparisons to be made: a two-metre adult is twice the height of a one-metre child; a sixty year old grandmother has lived three times as long as her twenty year old granddaughter.

4.5.1.3 Measures of Central Tendency

The **mode** is the most frequently occurring value (or values). The mode of the set {21 32 3 3 3 14 5} is 3. The set {1 32 3 3 3 24 5 5 5 46 27} is bimodal (having modes of 3 and 5). Multimodal sets are clearly possible. The mode is a meaningful measurement for any type of variable.

The **median** is the value above and below which one half of the observations fall. The median of the set {1 1 3 4 6 6 7} is 4, since the values 1, 1 and 3 fall below it, and the values 6, 6 and 7 fall above it. In the case of a set containing an even number of observations the median is taken to be the mean of the two centre-most cases: thus the median of the set {1 2 2 3 4 5 5 6} is thus 3.5. The median is a good measure of central tendency for ordinal data, since it makes use of the inherent ordering. The median is meaningless for nominal data, which cannot be ordered.

The **mean** is also known as the arithmetical average, and is generally what is meant by the imprecise layman's term "average". It is calculated as the sum of the values of all observations divided by the number of observations. This calculation makes use of the distance between observations, and so is only applicable to interval or ratio data.

Figure 4.2 Valid measures of central tendency

Type of Variable	Typical Content	Measures of Central Tendency		
		Mode	Median	Mean
Nominal	Gender	Valid	Invalid	Invalid
Ordinal	Education	Valid	Valid	Invalid
Interval) Ratio)	Temperature Height	Valid	Valid	Valid

The SPSS *FREQUENCIES* procedure calculates mode, median and mean.

4.5.1.4 Measures of Dispersion

One measurement of variation in a set of data is the **variance**, calculated as follows:

- (a) determine the mean of the observations
- (b) for each value, determine the deviation from the mean by subtracting the mean
- (c) sum the squares of the deviations
- (d) divide by one less than the number of observations.

The variance is an inconvenient measure because it is not expressed in the same units as the original observation. If the original data are in metres, for example, the variance is measured in squared metres. This tends to make the interpretation of variance difficult and non-intuitive.

The **standard deviation**, calculated by taking the square root of the variance, has the same units as the original data, and is therefore more commonly used.

Note that variance and standard deviation, being derived from differences from the mean, are only valid for interval and ratio variables.

The SPSS *FREQUENCIES* procedure calculates variance and standard deviation.

4.5.1.5 Hypothesis Testing

The purpose of hypothesis testing is to choose between conflicting hypotheses about the possible value of a population parameter. The two conflicting hypotheses, which are mutually conflicting, are called the **null hypothesis** (denoted H_0) and the **alternative hypothesis** (denoted H_1).

The test procedure generates a random variable known as a test statistic. A decision rule specifies a set of values of the test statistic for which the null hypothesis is accepted (the acceptance region), and a set of values for which the null hypothesis is rejected (the rejection region). Based upon the test statistic and the decision rule, the researcher will either (i) accept the null hypothesis, and thereby reject the alternate hypothesis, or (ii) reject the null hypothesis, and thus accept the alternate hypothesis.

The null hypothesis is assumed to be true before the test, and therefore it is not rejected unless the data provide strong evidence to do so. A test statistic falling within the rejection region does not prove that the alternate hypothesis is true, but indicates that the researcher has observed an unlikely event with a small probability. Similarly, a test statistic falling within the acceptance region

does not prove that the null hypothesis is true, but indicates that there is insufficient evidence to reject it.

It follows, therefore, that the decision to accept or reject the null hypothesis may be in error, due to an unlikely or unfortunate set of data.

A **type I error** occurs if the researcher rejects H0 when H0 is actually true.

A **type II error** occurs if the researcher accepts H0 when H0 is false.

The data cannot indicate that an error has taken place, because such an indication would require foreknowledge of the actual validity of H0. The level of significance of the test, however, indicates the probability that a type I error has occurred.

4.5.1.6 The Chi-Square Test of Independence

Researchers are often interested in testing the hypothesis that two variables are independent of each other. Chi-square is calculated by crosstabulating two variables into cells, as in this fictitious example:

GENDER		DRIVING ABILITY			Row Total
		Poor	Average	Excellent	
MALE	Cases	20	30	20	70
FEMALE	Cases	10	30	40	80
Column Total		30	60	60	150

The expected number of cases is now calculated for each cell as follows: for the cell in row i, column j the expected number of cases is given by:

$$\frac{(\text{count in row } i)(\text{count in column } j)}{\text{Total count}}$$

GENDER		DRIVING ABILITY		
		Poor	Average	Excellent
MALE	Cases	20	30	20
	Expected	14	28	28
FEMALE	Cases	10	30	40
	Expected	16	32	32

The residual values, being the difference between the observed and the expected values, are now calculated for each cell:

GENDER		DRIVING ABILITY		
		Poor	Average	Excellent
MALE	Cases	20	30	20
	Expected	14	28	28
	Residual	6	2	-8
FEMALE	Cases	10	30	40
	Expected	16	32	32
	Residual	-6	-2	8

The Pearson chi-square statistic is now calculated by summing the values for each cell determined by squaring the residual and dividing by the expected value:

GENDER		DRIVING ABILITY		
		Poor	Average	Excellent
MALE	Cases	20	30	20
	Expected	14	28	28
	Residual	6	2	-8
	statistic	2.57	0.16	2.28
FEMALE	Cases	10	30	40
	Expected	16	32	32
	Residual	-6	-2	8
	statistic	2.25	0.13	2.00

yielding a Pearson chi-square statistic of 9.49.

The degrees of freedom are calculated as:

(number of rows - 1)(number of columns - 1).

Thus in this example the degrees of freedom are $1 * 2 = 2$.

The chi-square distribution for 2 degrees of freedom provides the following probabilities:

Probability	that chi-square exceeds this value if the two variables are independent.
0.100	4.60
0.050	5.99
0.010	9.21
0.005	10.59

It is up to the researcher to compare these probabilities with the chi-square value obtained, and then to accept or reject the null hypothesis that the two variables are independent.

While testing for independence, the chi-square test provides little information about the strength or form of the association between two variables.

It is generally recommended that the expected value for any cell should not be less than 5.

The SPSS *CROSSTABS* procedure calculates the Pearson chi-square statistic, the observed significance level (i.e. the probability that the chi-square statistic is due to random data variations), the degrees of freedom, and an indication of the number of cells having expected frequencies less than 5.

The chi-square statistic provides little information about the strength or form of association between two variables. The magnitude of the chi-square statistic depends upon the sample size: increasing the sample size for a particular table n -fold tends to increase the chi-square value n -fold, so that large chi-square values can arise in large data sets even where residuals are small.

Cramer's V divides chi-square by the product of the sample size and the smaller of the number of rows and columns, then takes the square root of the result. Cramer's V lies between 0 and 1, where 0 indicates independence and 1 indicates very strong dependence. Cramer's V allows comparison between tables having varying dimensions and sample sizes. Nevertheless, interpretation of chi-square based measures is not always intuitive.

The SPSS *CROSSTABS* procedure can also calculate Cramer's V.

4.5.1.7 Correlation between Ordinal variables

Two ordinal variables are said to be positively correlated if cases having high values for one variable tend to have high values for the other, and cases having low values for one variable tend to have low values for the other. Similarly, negative correlation indicates that low values in one variable are associated with high values in the other, and high values in one variable are associated with low values in the other.

Any pair of cases (A and B) containing ordinal variables X and Y may be categorised as follows:

Concordant: Case A variable X is greater than Case B variable X, and Case A variable Y is greater than Case B variable Y.

Concordant: Case A variable X is less than Case B variable X, and Case A variable Y is less than Case B variable Y. **Discordant:** Case A variable X is greater than Case B variable X, and Case A variable Y is less than Case B variable Y.

Discordant: Case A variable X is less than Case B variable X, and Case A variable Y is greater than Case B variable Y.

Tied: Case A variable X equals Case A variable X, or Case B variable X equals Case B variable Y.

If the preponderance of pairs is concordant the association between the variables is positive. If the preponderance of pairs is discordant the association between the variables is negative. If concordant and discordant pairs are equally likely then no association exists.

Kendall's tau-b is calculated as:

$$\frac{P - Q}{\sqrt{(P + Q + T_x)(P + Q + T_y)}}$$

where P is the number of concordant pairs,
 Q is the number of discordant pairs,
 T_x is the number of pairs tied on X but not on Y, and
 T_y is the number of pairs tied on Y but not on X.

Kendall's tau-b lies in the range -1 to 1, negative values representing a negative relationship between variables (high values for one associated with low values for the other), positive values representing a positive relationship (high values associated with high values), and 0 representing the absence of relationship. Nevertheless, Kendall's tau-b only reaches the extremes -1 or 1 with square tables having not X-and-Y ties.

Spearman's Rank Correlation Coefficient is based upon the ranks of the data and, in the case where there are no ties, is calculated in exactly the same way as Pearson correlation coefficient: otherwise adjustments are made. Spearman's rank correlation coefficient lies, like Kendall's tau-b, in the range -1 to 1, and has the same interpretation.

4.5.1.8 Correlation between Interval variables

Again, correlation between two variables indicates that high values in one are associated with high values in the other, and low values in one associate with low values in the other (positive correlation), or that high values in one are associated with low values in the other, and low values in one associated with high values in the other (negative correlation).

If two variables X and Y are plotted with linear scales on a scatterplot having the usual x and y axes, then clustering of data points about a straight line which intercepts the x axis indicates linear correlation between X and Y.

Pearson's correlation coefficient (denoted r) lies in the range -1 to 1, -1 representing a perfect negative linear correlation, 1 representing a perfect positive linear correlation, and 0 representing the absence of linear correlation.

Calculation of r is effected by extracting the means of the two variables, determining the variances for each variable, and determining the level of covariance.

The r statistic, although indicating the strength of linear correlation, provides not indication about the slope or intercept of the line.

4.5.1.9 Linear Regression

In the simple linear regression model the null hypothesis states that, given two variables X and Y, the relationship between the expected value of Y and the value of X can be expressed as:

$$Y = ax + c$$

where a and c are unknown parameters that have to be estimated.

This means that for a given value of X, the value of Y lies on a straight line having slope a which intercepts the x axis at c.

If data pairs (X,Y) from the real world are plotted against the line $Y = ax + c$, many points will lie away from that line. The least-squares method determines the magnitude of each such deviation, squares it (to ensure that all deviations are positive), and calculates the slope and intercept of the line which provides the smallest sum of squared deviations.

4.5.1.10 Causation

Several statistics have been discussed above which indicate dependence or correlation between one variable and another. None of these statistics, however, indicate that one variable "causes" or "explains" another. Given two variables X and Y with indications of mutual dependence or correlation, it is the researcher's task to place the variables in context, and to conjecture whether X explains Y, Y explains X, or X and Y covary because of some other factor.

4.5.1.11 Multiple Regression

Multiple regression is a generalisation of simple linear regression. If knowledge of one variable X helps to predict the value of Y, then it is natural to conjecture that knowledge of additional variables $X_1, X_2 \dots X_n$ might produce a more accurate prediction of Y.

The multiple regression model, therefore, states as its null hypothesis that $Y = a_1x_1 + a_2x_2 + a_3x_3 \dots + a_nx_n + c$

where $a_1, a_2, a_3 \dots a_n$ and c are unknown parameters which require to be estimated.

SPSS contains a sophisticated procedure which allows the analysis of multiple regression. The researcher nominates one dependent variable, and several independent variables. The procedure determines the independent variable which has the highest correlation with the dependent variable, enters that variable into the equation, and determines R-squared (the coefficient of multiple determination, that is the proportion of the variation in the dependent variable that is explained by the independent variables). The procedure now

proceeds in a number of steps. At each step, independent variables not yet in the equation are examined: if the inclusion of one or more variables would increase R-squared by a predetermined level then the variable which causes the greatest increase in R-squared is added to the equation. Then independent variables already in the equation are re-examined, and dropped from the equation if by so doing R-squared is reduced by less than a predetermined level. The process continues until R-square cannot be increased or decreased beyond predetermined levels.

4.5.1.12 Factor Analysis

Factor Analysis is heavily based upon regression coefficients. As applied in this research project, factor analysis has two primary functions: to reduce the number of variables by aggregating two or more into a single factor, and simultaneously to explore variable areas in order to identify the factors presumably underlying the variables.

Suppose that we have asked a number of questions about attitudes to work and to the workplace, and that a correlation matrix for the associated variables shows that each variable correlates with at least one other. We might conjecture that the data are redundant, in that several variables are describing different characteristics of the same concept. Characteristics which go together constitute a factor, and factor analysis refers to statistical techniques which help us to determine those factors.

Principal-components analysis proceeds as follows. The total variance of each test variable is set to 1. It follows, therefore, that the total variance of the set is equal to the number of variables. A component (or factor) is extracted that accounts for the largest amount of variance shared by the tests. The second factor accounts for the largest amount of variance which is not related or explained by the first factor: the first and second factors are said to be orthogonal. This procedure continues until there are as many factors as variables.

The extent to which each factor accounts for the total shared variance of the set (the factor's eigenvalue) is determined: the sum of the eigenvalues will equal the number of variables, and the proportion of common variance explained by each factor is its eigenvalue divided by the sum of the eigenvalues. There will initially be as many factors as variables, but it is usual to retain only those factors with an eigenvalue greater than 1.

Because the first factors extracted from the analysis are those which account for the maximum amount of variance it may not be easy to interpret what they represent, since most items will fall on the first factor although their correlations with it might not be that high. The factors may be rotated in order to maximise the loadings of some of the items on the factors: they may be rotated orthogonally, so that factors remain independent, or they may be rotated obliquely, in which case factors are allowed to become correlated.

The researcher is presented with item loadings upon factors. In general, the meaning of a factor is determined by the items which load most highly on it. It is the researcher's responsibility to determine whether items should be retained within each factor, which items should be ignored, and to determine whether the derived factor has any defensible meaning in the real world.

4.5.1.13 Application of Procedures to Variables

To summarise, then: not all procedures are theoretically applicable to all types of variable, as shown below:

Figure 4.3 Variables and permitted procedures

Procedure	Type of variable		
	Nominal	Ordinal	Interval or Ratio
Chi-squared test for independence	YES	YES	Grouped data
Kendell's Tau-b correlation statistic	NO	YES	NO
Spearman's rank correlation coefficient	NO	YES	NO
Pearson's correlation coefficient	NO	NO	YES
Linear regression - least squares	NO	NO	YES
Multiple regression	NO	NO	YES

4.5.1.14 Practical Considerations

This study, as is the case for much social research, asks questions about individual's attitudes, beliefs, and expectations, and places the results variables which are, strictly speaking, ordinal.

The tools available for the analysis of ordinal variables, however, have a number of limitations.

The chi-square test determines whether one variable is dependent on another, but gives no indication of the direction or extent of that dependency.

Kendell's tau-b statistic indicates correlation between variables, but is affected by ties or non-square tables.

Spearman's rank correlation coefficient is determined in a similar manner to Pearson's correlation coefficient which is, strictly speaking, only applicable to interval variables.

Linear regression provides information about the slope and intercept of linearly-correlated interval variables, and multiple regression determines the

effect of multiple independent interval variables upon one dependent interval variable. Yet these tools, which provide the largest amount of information, are not applicable to ordinal variables.

It is not surprising, then, to find that in practice Pearson's correlation coefficient, linear regression and multiple regression are applied, not only to ordinal data measuring autonomy, responsibility, satisfaction and expectations, but even to dichotomous nominal data measuring gender or race.

This practice, which may be detected in large numbers of social and behavioural papers, is addressed by Hays (1988:564), who states:

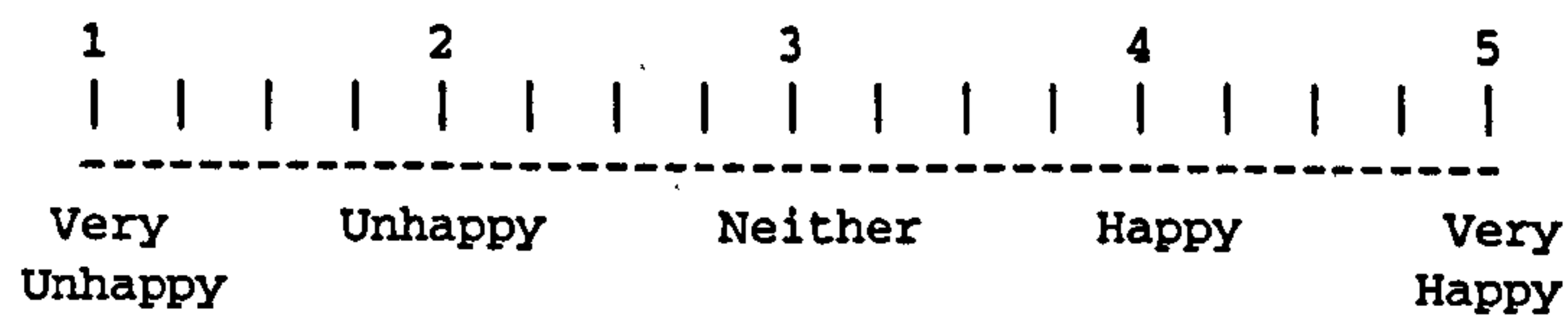
*"It is **not** necessary to make any assumptions at all about the form of the distribution, the variability of Y scores within X columns, or the true level of measurement represented by the scores in order to employ linear regression and correlation indices to **describe** a given set of data. So long as there are N distinct cases, each having two numerical scores, X and Y, then **descriptive** statistics of correlation and regression may be used. In so doing, we describe the data **as though** a linear rule were to be used for prediction, and this is a perfectly adequate way to talk about the tendency for **these** numerical scores to associate or "go together" in a linear way in **these data**" (my emphases).*

The mathematical reasoning behind these strictures generally leads from the inability to derive a mean from ordinal data. It could be argued, however, that it is often the case that the "mean" value of an ordinal variable is more meaningful than the "mean" derived from an interval variable.

Consider the question "How many children do you have?". A variable containing answers to this question is clearly ratio: it has a well defined zero point, and the respondent with four children has twice as many as the respondent with two. Yet the statement that "the mean number of children was 2.4" is curious: certainly no respondent had the mean number of children, and no respondent agonised between ticking the "2" box and ticking the "3" box.

Yet the question "How happy did you feel? (1) Very unhappy, (2) unhappy, (3) neither happy nor unhappy (4) happy, (5) very happy" might well cause a respondent to hesitate, and to consider whether he was (4) happy, or (5) very happy, and eventually, with reluctance, tick either box "4" or "5". The Likert scale presented to the respondent could easily be considered to be a limited number of choices within a continuum. Indeed, posing the question like this:

"How happy did you feel ?



Please mark a vertical line on the scale point which best describes your feeling at the time."

conveys to the respondent that the scale upon which happiness is being measured IS linear. A calculated mean value of 4.3 is more intuitively meaningful than "2.4 children". 4.3 indicates that a respondent having the mean feeling of happiness would consider his feeling to lie somewhere between "happy" and "very unhappy": on reflection, however, it lies closer to "happy" than to "very happy".

Similarly, given a dichotomous nominal variable which codes Female = "1" and Male = "2", a mean of 1.8 appears to have as much (or as little) meaning as "2.4 children". Once again, no respondent has the mean gender, and no respondent hesitated when answering the question. Should the application of multiple regression to a variable representing gender lead to the mathematical result that "monthly salary lay close to the line represented by $(3000 \times \text{gender}) + (\text{age} \times 100) + 2000$ ", it would seem reasonable to conclude that there IS a relationship between gender and salary, and that relationship has been better described by applying tools and procedures which are theoretically inapplicable.

Based upon practical necessity, the approval of authors such as Hays, the practice of predecessors in the fields of social and behavioural research, and the reasoning given above, then, this paper will present results based upon the application of linear regression techniques to ordinal and nominal data.

4.5.2 The process of data analysis

4.5.2.1 Response and Response Rate

Of 690 questionnaires distributed by the Centre for International Briefing, 15 were returned by the Post Office marked "Not known at this address".

Of the remaining 675 questionnaires distributed by the Centre for International Briefing, presumed delivered by post, 251 were returned. This represents a return rate of 37%.

An additional 71 questionnaires were completed by MBA students at Cranfield School of Management and by employees of companies visited or interviewed.

4.5.2.2 Data Analysis

Data analysis proceeded as follows:

Cases not conforming to a specific set of characteristics were rejected from the sample. This ensured that the population sample comprised British nationals who were employed at the time they were selected for an international assignment, recruited internally by their employing organisation in order to undertake an international assignment for that organisation with the expectation that they would return to employment with their home-based organisation, and have completed and returned from the assignment as expected.

Data analysis then proceeded with the remaining cases.

Frequency tables were extracted for each variable represented by a question in the questionnaire. These tables yielded profiles of the sample.

The first research question asks "What work- and career-related expectations do individuals generate before, during and after an expatriate assignment ?"

In order to answer this question, the variables representing individual expectation at various stages throughout an international assignment were identified and tabulated. Bivariate relationships between these variables were identified and tabulated.

The second and third research questions ask "How are those expectations affected by organisational actions ?" and "What other factors affect those expectations ?"

In order to answer these questions, the variables already identified as representing individual expectation were treated as dependent variables. All other variables were treated as independent variables representing either "organisational action" or "other factors".

Preliminary analysis identified those independent variables having a bivariate relationship with one or more dependent variables.

It should be noted that such an exercise has only been made feasible by the power of modern computers and their software. When statistical calculations of this nature were made by hand, simply determining whether a bivariate relationship existed between any single pair of variables was a long-winded, tedious business prone to human error. This study contains 10 dependent and approximately 80 independent variables, so that the preliminary analysis alone demanded some 800 tests for correlation. Modern desktop computers are now fast enough to undertake such an analysis in a couple of hours.

Having identified those independent variables having some linear relationship with one or more of the dependent variables, factor analysis was used in order, where possible, to combine independent variables into factors, which in turn were treated as independent variables. This served to reduce the number of independent variables of interest to a manageable number. In addition, this enabled the multivariate analysis that followed (because multivariate analysis is sensitive to the presence of multiple covariation).

Finally, multivariate analysis was applied to each dependent variable in order to yield regression equations encapsulating a large amount of information in a concentrated form capable of diagrammatic display.

The fourth research question asks **"What relationships exist between factors affecting expectations ?"**. This question is answered in part by examination of the factor analyses described above. In addition, bivariate relationships were identified between those independent variables that had already been identified as of interest.

4.5.3 Presentation of the Findings

The results of these analyses are described in Chapter 5

Chapter Five

Findings

Chapter Five Findings

The previous chapter describes how survey questionnaires were designed and distributed in order to elicit information about individuals (and their partners) who had completed an international assignment.

This chapter describes and discusses the findings in that survey.

Section 5.1 tabulates the responses to the questionnaire.

Section 5.2 describes how cases were rejected in order to ensure that all cases in the sample conformed to a number of common criteria.

Section 5.3 provides a brief summary of the characteristics of the participants in the survey, and a brief summary of the characteristics of the assignments they undertook.

Section 5.4 addresses the first three research questions by examining the propositions defined in Chapter 3 above in the light of the responses to the questionnaire.

Section 5.5 addresses the fourth research question by identifying relationships between the precursors to motivation and expectation uncovered in section 5.4

5.1 Questionnaire Responses

The responses to the questionnaire are tabulated below.

Table 5.1 **Gender**

(Question 1.2)

Gender	% of 96
Male	89.6
Female	10.4

Table 5.2 **Nationality**

(Question 1.3)

Nationality	% of 322
British	84.5
European	11.4
Other	4.1

Table 5.3 **Expatriate status**

(Question 1.5)

Status	% of 322
Selected for an assignment	4.8
On assignment	53.0
Returned from an assignment	42.2

Table 5.4 Age

(Question 1.6a)

Age (in years)	% of 95	Cumulative %	% of 95
23	2.1	2.1	
24	3.2	5.3	
25	15.8	21.1	
26	10.5	31.6	43.2
27	7.4	38.9	
28	3.2	42.1	
29	1.1	43.2	
30	6.3	49.5	
31	4.2	53.7	
32	2.1	55.8	
33	1.1	56.8	
34	3.2	60.0	35.8
35	3.2	63.2	
36	6.3	69.5	
37	3.2	72.6	
38	2.1	74.7	
39	4.2	78.9	
40	2.1	81.1	
41	1.1	82.1	
42	3.2	85.3	
43	4.2	89.5	
44	1.1	90.5	
45	1.1	91.6	17.9
46	1.1	92.6	
47	2.1	94.7	
48	2.1	96.8	
51	1.1	97.9	
52	1.1	98.9	3.2
57	1.1	100.0	

Mean age = 32.9 years. Standard deviation = 7.96

The responses to this question are shown graphically in Figure 5.1 below:

Figure 5.1 Age (Question 1.6a)

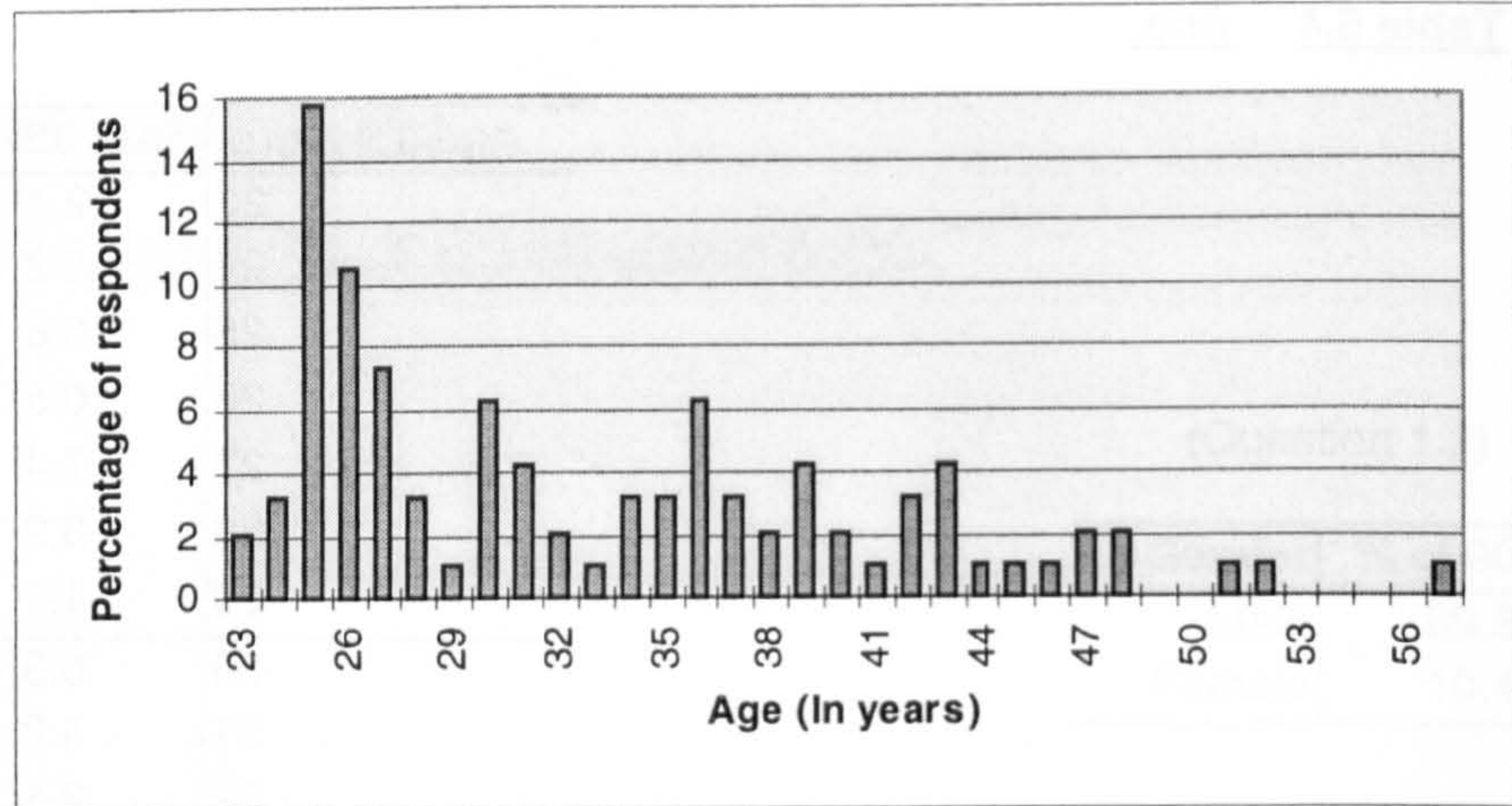


Table 5.5 Marital Status (Question 1.6b)

Marital Status	% of 96
Unmarried	30.2
Married	69.8

Table 5.6 Dependent children (Question 1.6c)

Dependent Children	% of 96
None	58.3
1	10.4
2	24.0
3	6.3
4	1.0

Mean number of children = 0.81 Standard Deviation = 1.07

Table 5.7 **Educational Qualifications** (Question 1.7)

Qualifications	% of 96
None	20.8
Technical Diploma	10.4
First Degree	57.3
Masters Degree	8.3
Doctorate	3.1

Table 5.8 **Occupational Speciality** (Question 2.1)

Occupational Speciality	% of 95
Technical Specialist	23.5
Marketing or Selling	10.6
Finance / Administration	28.2
Middle Management	21.2
General Management	3.5
Other	12.9

Table 5.9 **Employment Status at the time of selection** (Question 2.2a/e)

Status	% of 322
Employed	94.9
Self Employed	1.3
Unemployed	2.8
Student	0.9

Table 5.10 Tenure with organisation (Question 2.2d)

Tenure (years)	% of 94	Cumulative %	% of 94
1	2.1	2.1	
2	9.6	11.7	
3	20.2	31.9	62.8
4	19.1	51.1	
5	11.7	62.8	
6	6.4	69.1	
7	2.1	71.3	
8	1.1	72.3	16.0
9	4.3	76.6	
10	2.1	78.7	
11	1.1	79.8	
12	2.1	81.9	
13	2.1	84.0	10.6
14	2.1	86.2	
15	3.2	89.4	
18	1.1	90.4	
19	3.2	93.6	
22	1.1	94.7	
23	1.1	95.7	10.6
25	1.1	96.8	
26	1.1	97.9	
30	1.1	98.9	
35	1.1	100.0	

Mean time with current employer = 7.32 years. Standard deviation = 6.80

Table 5.11 How recruited (Question 2.3)

How Recruited	% of 322
Internally	83.8
Joined the organisation for the assignment	10.2
Recruited by an agency	2.2
Other	3.8

Table 5.12 Anticipated deployment after return from assignment (Question 2.4)

Anticipated deployment	% of 322
Return to the home-base organisation	94.9
Return to some form of employment	1.3
Become self employed	2.8
Become unemployed	0.9
Other	0.0

Table 5.13 Geographical region to which assigned (Question 2.5)

Assigned Region	% of 96
North America	31.0
Asia	29.8
Europe	10.7
Africa	9.5
Latin American/Caribbean	8.3
Australasia/Pacific Islands	7.1
Middle East	3.6

Table 5.14 Pre-defined assignment duration (Question 2.6)

The duration of the assignment was defined at the time of selection	% of 93
Yes	90.3
No	9.7

Table 5.15 Planned duration of the assignment (Question 2.6)

Planned duration of the assignment	% of 90
6 months	2.2
12 months	3.3
18 months	21.1
24 months	33.3
30 months	8.9
36 months	24.4
48 months	6.7

Mean planned duration = 27 months. Standard Deviation = 9.40

Table 5.16 Previous expatriate experience (Question 2.7)

Previous expatriate experience	% of 95
First assignment	69.5
Previous experience	30.5

Table 5.17 Perceptions at the time of Selection (Question 2.8)

"Please consider whether you would have agreed or disagreed with each statement at the time that you were selected for the expatriate assignment"

Perception at the time of selection	Percentage of participants				
	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
2.8a I actively sought the assignment	5.2	13.5	22.9	22.9	35.4
2.8b I expect the assignment to be financially rewarding	2.1	9.4	27.1	44.8	16.7
2.8c I expect the assignment to be challenging and/or exciting			2.1	35.4	62.5
2.8d I expect the assignment to improve my career prospects		6.3	19.8	36.5	37.5
2.8e I was pleased to be selected		1.0	7.3	45.8	45.8
2.8f I was surprised to be considered for the expatriate assignment	25.0	36.5	19.8	15.6	3.1
2.8g Such an expatriate assignment is normal practice in my organisation	7.3	20.8	15.6	44.8	11.5
2.8h I joined the organisation because I wanted to travel	6.3	18.8	28.1	32.3	14.6
2.8i I believe that my selection shows that my achievements and/or track record were recognised and appreciated by my organisation	1.0	7.3	14.6	53.1	24.0
2.8j I expect to learn from the assignment			3.1	47.9	49.0

Table 5.18 Motive for accepting the assignment (Open Question 2.9)

"In you own words, please explain why you accepted this assignment"

The method used to code the free-text answers to this open question is detailed on page 270

Motive to accept assignment	% of 85
Personal reasons	20.0
"Push" Job-related	10.6
"Pull" Job-related	37.6
Career-related	31.8

Table 5.19 Subjects discussed at selection (Question 2.10)

"Please consider to what extent each subject was discussed with you during the process that led to your selection for the expatriate assignment"

Subjects discussed at the time of selection		Percentage of participants		
		Not at all	To some extent	In depth
2.10a	Duties and responsibilities during the assignment	12.5	74.0	13.5
2.10b	Salary and allowances during the assignment	8.3	43.8	47.9
2.10c	The position of partner and/or family during the assignment	22.1	52.9	25.0
2.10d	Career prospects	40.6	54.2	5.2
2.10e	The foreign culture/environment	27.1	57.3	15.6
2.10f	The assignment work environment	28.4	64.2	7.4
2.10g	The job you would have on return from the assignment	68.8	29.2	2.1
2.10h	Why you had been selected	35.4	56.3	8.3
2.10i	Preparation and/or training for the assignment	45.8	39.6	14.6

Table 5.20 **Formality of the selection process** (Question 2.11)

Formality of the selection process	% of 96
Informal	41.7
Both formal and informal	51.0
Formal	7.3

Table 5.21 **Final selection decision** (Question 2.12)

The final selection decision was made by	% of 96
Line Manager	6.4
Personnel Department	6.4
Director(s)	26.6
International Department	24.5
Destination Country Management	36.2

Table 5.22 **Inclusion in selection discussions** (Question 2.13)

The selection process included discussion with	% of 96
Line Manager	58.3
Personnel Department	64.5
Director(s)	35.4
International Department	47.9
Destination Country Management	36.4

(These sum to more than 100% because multiple responses were allowed)

Table 5.23 Time between selection and departure (Question3.1)

Elapsed time (weeks) between selection and departure	% of 96	Cumulative %	% of 96
1	2.2	2.2	7.5
2	0.0	2.2	
3	2.2	4.3	
4	3.2	7.5	
5	1.1	8.6	11.8
6	2.2	10.8	
7	0.0	10.8	
8	8.6	19.4	
9	0.0	19.4	20.4
10	5.4	24.7	
11	0.0	24.7	
12	15.1	39.8	
13	2.2	41.9	12.9
14	3.2	45.2	
15	2.2	47.3	
16	5.4	52.7	
17	0.0	52.7	17.2
18	1.1	53.8	
19	0.0	53.8	
20	16.1	69.9	
21	1.1	71.0	5.4
22	1.1	72.0	
23	0.0	72.0	
24	3.2	75.3	
25	3.2	78.5	24.7
26	4.3	82.8	
28	2.2	84.9	
30	3.2	88.2	
32	2.2	90.3	
36	1.1	91.4	
40	3.2	94.6	
45	1.1	95.7	
50	1.1	96.8	
52	3.2	100.0	

Mean = 18.56 weeks. Standard Deviation = 11.62

The responses to this question are also shown graphically in Figure 5.2 below:

Figure 5.2 Time between selection and departure

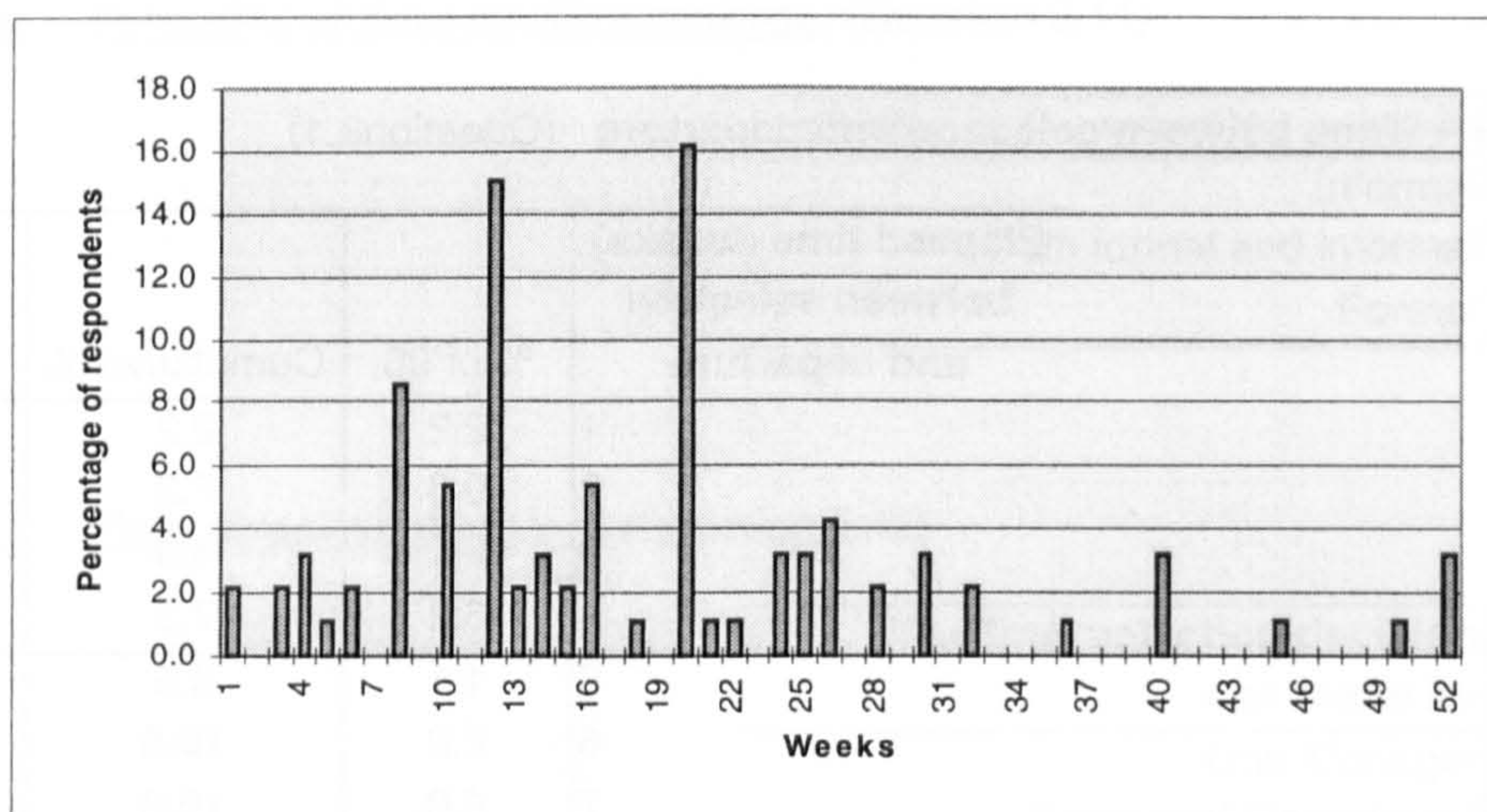


Table 5.24 Pre-departure training and preparation (Questions 3.2, 3.3)

Question	Training Provided	% of n
3.2a	Language training (employee)	78% of 45
3.3d	Meeting Returnees (employee)	71% of 93
3.2b	Language training (partner)	71% of 34
3.2d	Cultural training (employee)	57% of 81
3.2e	Cultural training (partner)	56% of 61
3.3e	Meeting Returnees (partner)	52% of 67
3.3a	Familiarisation Visits (employee)	36% of 94
3.3b	Familiarisation Visits (partner)	32% of 68
3.2g	Job-oriented training	29% of 77
3.5	Temporary assignment	22% of 93
3.2c	Language training (child(ren))	11% of 19
3.2f	Cultural training (child(ren))	7% of 28
3.3c	Familiarisation Visits (child(ren))	5% of 41
3.3f	Meeting Returnees(child(ren))	3% of 36

(The differing numbers of respondents to each type of training indicate that not all participants had partners, not all those with partners had children, and not all participants considered that language, cultural or job-oriented training was necessary).

Table 5.25 Training Time (Question 3.4)

Time (weeks) occupied in training and preparation for the expatriate assignment	% of 96
0	12.6
1	44.2
2	16.8
3	8.4
4	17.9

Mean = 9.6 days. Median and Mode = 5 days. Standard Deviation = 13.15

Table 5.26 Return Visits Home (Question 5.1)

How often return for business reasons	% of 95
Never	41.1
Annually	33.7
Six-Monthly	9.5
Quarterly	11.6
Monthly	4.2

Table 5.27 Personal Support (Question 5.3)

"Is there a person or department with whom you can discuss your career ?"	% of 96
No	24
Yes	76

Table 5.28 Visits from the home base (Question 5.4)

How often are you visited by home-based personnel with whom you can discuss your career ?	% of 96
Monthly	
Quarterly	5.3
Six-Monthly	10.5
Annually	36.8
Never	47.4

Table 5.29 Communication Links (Question 5.5)

"How are you kept informed about your home-base organisation ?"		% of 96
5.5a	House magazines	75.0
5.5b	Written messages	53.1
5.5c	Telephone	59.4
5.5d	Personal briefing on assignment	26.0
5.5e	Personal briefing on visits home	33.3
5.5f	Group briefing on assignment	22.9
5.5g	Group briefing on visits home	4.2
5.5h	Other means	17.7
5.5i	None	3.1

Table 5.30 Effectiveness of Communications (Question 5.6)

"How effective is communication between you and your home-base organisation in keeping you up to date with [these subjects] ?"

Effectiveness of communication in keeping up to date with:		Percentage of participants			
		No Communication	Ineffective	Quite Effective	Very Effective
5.6a	Personnel changes within the home-base department	13.8	33.0	44.7	8.5
5.6b	Job opportunities within the home-base department	41.3	38.0	16.3	4.3
5.6c	Aims and strategies of the home-base department	20.0	24.2	51.6	4.2
5.6d	Personnel changes within the organisation as a whole	13.5	34.4	43.8	8.3
5.6e	Job opportunities within the organisation as a whole	41.9	40.9	15.1	2.2
5.6f	Aims and strategies of the organisation as a whole	11.7	23.4	55.3	9.6

Table 5.31 Appraisal (Question 5.7)

Appraisal mechanism in place	% of 96
No	13.8
Yes	86.2

Table 5.32 Actual duration of the assignment (Question 6.1)

Duration (Months)	% of 96	Cumulative %	% of 96
4	1.1	1.1	
5	0.0	1.1	3.2
6	2.1	3.2	
7	1.1	4.3	
9	1.1	5.3	
10	1.1	6.4	6.4
11	1.1	7.4	
12	2.1	9.6	
13	1.1	10.6	
14	3.2	13.8	
15	1.1	14.9	20.2
17	1.1	16.0	
18	13.8	29.8	
19	1.1	30.9	
20	4.3	35.1	
21	3.2	38.3	24.5
22	1.1	39.4	
23	1.1	40.4	
24	13.8	54.3	
25	1.1	55.3	
26	3.2	58.5	
28	2.1	60.6	16.0
29	1.1	61.7	
30	8.5	70.2	
31	2.1	72.3	
32	2.1	74.5	
33	3.2	77.7	14.9
34	2.1	79.8	
36	5.3	85.1	
37	1.1	86.2	
38	5.3	91.5	
39	1.1	92.6	10.6
42	3.2	95.7	
45	1.1	96.8	2.1
47	1.1	97.9	
54	1.1	98.9	1.1
57	1.1	100.0	1.1

Mean = 25.7 months. Standard Deviation = 10.44

The responses to this question are shown graphically in Figure 5.3 below:

Figure 5.3 Actual duration of the assignment

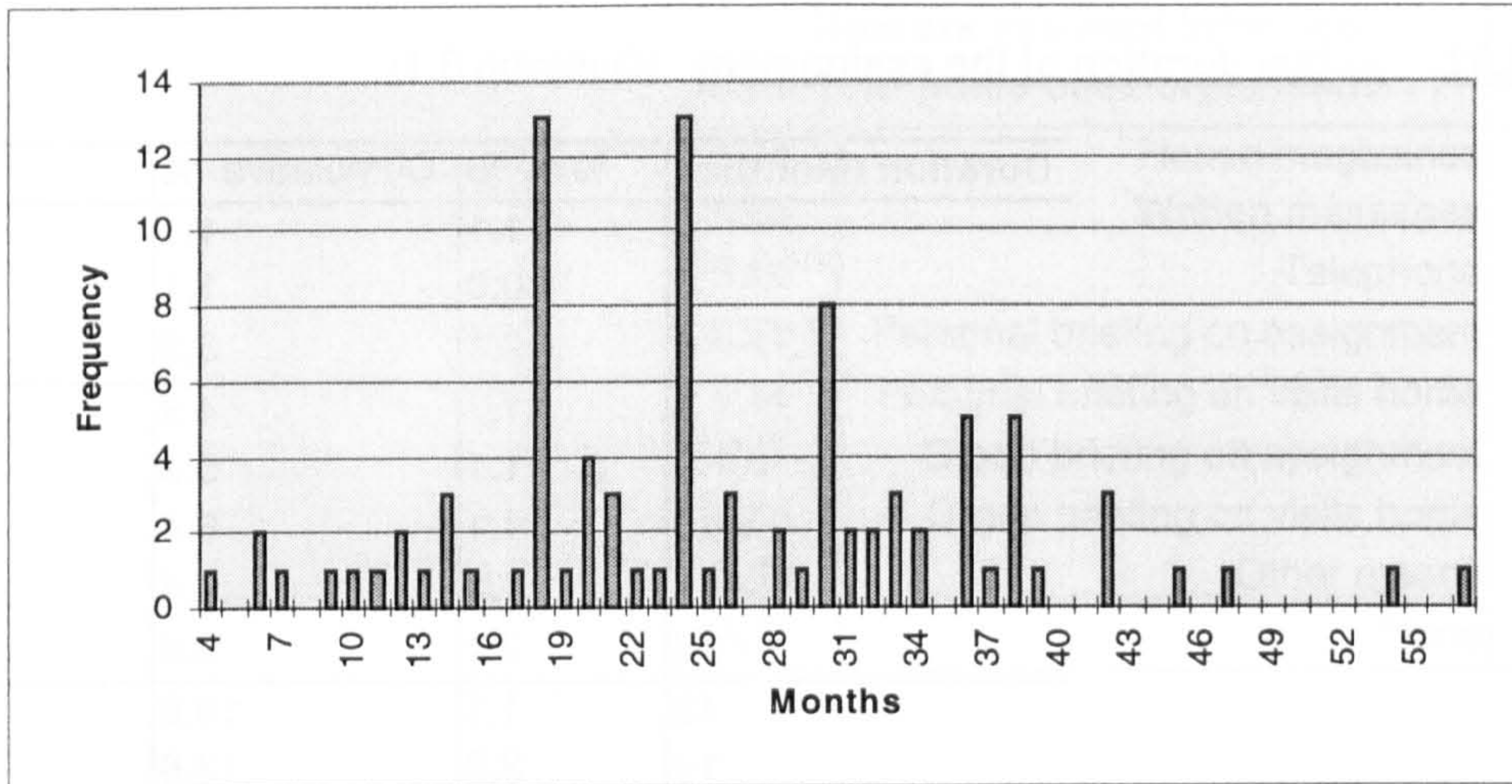


Table 5.33 Difference between planned and actual duration (Questions 2.6, 6.1)

		Frequency	% of 89	Cumulative %	% of 89
Months (Shorter)	-30	1	1.1	1.1	
	-28	1	1.1	2.2	
	-27	1	1.1	3.4	
	-26	1	1.1	4.5	12.4
	-23	1	1.1	5.6	(more than
	-22	1	1.1	6.7	one year
	-19	1	1.1	7.9	shorter)
	-18	2	2.2	10.1	
	-17	1	1.1	11.2	
	-15	1	1.1	12.4	
	-11	1	1.1	13.5	
	-10	1	1.1	14.6	4.5
	-8	1	1.1	15.7	
	-7	1	1.1	16.9	
	-6	5	5.6	22.5	
	-5	1	1.1	23.6	
-4	3	3.4	27.0	18.0	
-3	3	3.4	30.3		
-2	2	2.2	32.6		
-1	2	2.2	34.8		
As Planned	0	27	30.3	65.2	30.3
	2	8	9.0	74.2	
	3	2	2.2	76.4	20.2
	4	1	1.1	77.5	
	5	1	1.1	78.7	
	6	6	6.7	85.4	
	7	1	1.1	86.5	
	8	1	1.1	87.6	9.0
	9	2	2.2	89.9	
	10	2	2.2	92.1	
	12	2	2.2	94.4	
	13	1	1.1	95.5	5.6
	14	1	1.1	96.6	(more than
Months (Longer)	21	2	2.2	98.9	one year
	36	1	1.1	100.0	longer)

Mean difference = -1.03 months Standard deviation = 10.53

Table 5.34 Notice of a definite date for return (Question 6.2)

Notice of a definite date for return	% of 88
0	1.1
1	18.2
2	21.6
3	20.5
4	4.5
5	1.1
6	21.6
7 or more	11.4

Mean = 4.90 months. Median = 3.00 Modes = 2.00 and 6.00 Standard deviation = 5.81

Table 5.35 Choice about returning (Question 6.3)

Choice to return at this time	% of 94
No	44.7
Yes	55.3

Table 5.36 Motive to return (Open Question 6.3)

If you had a choice, why did you choose to return at this time	% of 40
Personal reasons	25.0
Personal and professional reasons	10.0
Professional reasons	65.0

Table 5.37 Pre-return evaluation (Question 6.4)

"Please consider whether you agree or disagree with each statement"

Evaluation of the assignment		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
6.4a	During the assignment I learned to work and manage across cultural boundaries		1.1	4.3	51.6	43.0
6.4b	I enjoyed more autonomy than I had experienced at my home base	2.1	10.6	9.6	30.9	46.8
6.4c	I held more responsibility that at my home base	5.3	9.6	17.0	25.5	42.6
6.4d	The experience has made me a better manager		2.1	10.6	43.6	43.6
6.4e	The assignment has enhanced my particularly specialist expertise		17.0	21.3	34.0	27.7
6.4f	I am glad that I accepted the assignment		2.1	3.2	18.1	76.6
6.4g	I am pleased to return to my home base	8.5	14.9	29.8	33.0	13.8
6.4h	I would welcome another expatriate assignment	2.1	6.4	7.4	39.4	44.7

Table 5.38 Involvement in pre-return discussion (Question 6.6)

"Before you departed from the expatriate assignment, [with whom] had you discussed your deployment on return?"

	Pre-return discussion about deployment	% of 96
6.6a	Local management in the expatriate country	29.2
6.6b	Home-based department	60.4
6.6c	Home-based personnel department	40.6
6.6d	Home-based international department	25.0
6.6f	There was no pre-return discussion	13.5

Table 5.39 Pre-return expectations (Question 6.7)

Please consider whether, in the last few days of the assignment, when you knew your return was imminent, you would have agreed or disagreed with each statement*

Pre-return expectations		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
6.7a	I expect the return to my home base to be financially rewarding	20.0	31.6	23.2	23.2	2.1
6.7b	I expect the return to my home base to be exciting and/or challenging	7.4	14.7	23.2	44.2	10.5
6.7c	I expect the return to my home base to provide skill/experience that I lack	3.2	23.2	34.7	31.6	7.4
6.6d	I expect the return to my home base to enhance my career prospects	3.2	16.8	18.9	45.3	15.8

Table 5.40 Foreknowledge of job on return (Question 6.8)

Before leaving the host country, how much did you know about the job you would be assigned on return ?	% of 95
No idea at all	10.5
Knew approximately what the job would be	26.3
Knew the department but not the job	24.2
Knew exactly what the job would be	38.9

Table 5.41 Post-return assessments (Question 7.1)

"Please consider whether you agree or disagree with each statement"

Post-return assessment of the assignment		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
7.1a	I am satisfied with the status that my job provides	6.3	24.0	16.7	43.8	9.4
7.1b	My job is suitable for my talents and expertise	7.3	18.8	19.8	46.9	7.3
7.1c	I am pleased with the geographical location of my workplace	10.4	20.8	20.8	33.3	14.6
7.1d	I am satisfied with the autonomy that my job provides	14.6	19.8	14.6	42.7	8.3
7.1e	My job gives me more autonomy than I would like	28.1	56.3	14.6		1.0
7.1f	I am satisfied with the responsibility that my job requires	10.4	26.0	21.9	37.5	4.2
7.1g	My job carries more responsibility than I would like	28.1	61.5	9.4	1.0	
7.1h	My job allows me to make use of the experience that I acquired on the expatriate assignment	17.7	26.0	16.7	37.5	2.1
7.1i	The expatriate assignment has enhanced my potential usefulness to my employer	2.1	3.1	12.5	57.3	25.0
7.1j	I am pleased that I accepted the expatriate assignment	1.0	2.1	2.1	22.9	71.9
7.1k	If I could turn the clock back, I would accept the assignment again	3.1	2.1	1.0	25.0	68.8
7.1l	I would recommend a colleague to accept an expatriate assignment		1.0	8.3	31.3	59.4
7.1m	The expatriate assignment has enhanced my short-term career prospects	9.4	30.2	22.9	24.0	13.5
7.1n	The expatriate assignment has enhanced my long-term career prospects	3.1	12.5	18.8	42.7	22.9

Table 5.42 Subjects discussed after return (Question 7.2)

Subjects discussed after return	Percentage of participants		
	Not at all	To some extent	In depth
Your achievements during the expatriate assignment	47.9	40.4	11.7
What you had learned during the expatriate assignment	52.1	39.4	8.5
Structural and/or personnel changes within your home-base department	37.2	46.8	16.0
Aims and strategies of your home base department	29.8	46.8	23.4
Aims and strategies of the organisation as a whole	26.6	53.2	20.2
Your deployment after return	9.5	58.9	31.6
Your salary and/or allowances after return	16.0	54.3	29.8
Your career prospects	39.4	48.9	11.7

Table 5.43 Post-return discussion involvement (Question 7.3)

"With whom did [post-return] discussion take place?"

Post-return discussion		%
7.3a	With line management	68.8
7.3b	With personnel dept	50.0
7.3c	With international dept	28.1
7.3d	With director(s)	30.2
7.3f	No discussion	6.3

Table 5.44 Elapsed time between return and final settled position (Question 7.4)

Elapsed time between return and final settled position (Days)	% of 96	Cumulative Percent	% of 96
0	6.0	6.0	
1	6.0	12.0	
2	3.6	15.7	37.3
3	3.6	19.3	
4	2.4	21.7	
5	2.4	24.1	
7	13.3	37.3	
9	1.2	38.6	
10	2.4	41.0	
11	2.4	43.4	32.5
12	1.2	44.6	
14	7.2	51.8	
15	3.6	55.4	
18	1.2	56.6	
30	13.3	69.9	
60	7.2	77.1	
74	2.4	79.5	
90	3.6	83.1	
92	1.2	84.3	30.1
120	1.2	85.5	
180	3.6	89.2	
210	1.2	90.4	
240	1.2	91.6	
256	1.2	92.8	
260	1.2	94.0	
270	2.4	96.4	
300	1.2	97.6	
352	1.2	98.8	
700	1.2	100.0	

Mean = 60 days. Median = 14 days. Mode = 7 days/30 days. Standard Deviation = 108.68

Table 5.45 Special occurrences after return (Question 7.5) "Did any of the following occur?"

Occurrences after return	% of 96
Extended leave	16.7
Temporary assignment	15.6
Unsuitable assignment	6.3
Resigned	8.3

Table 5.46 Partner's career (Open Question P1.7)

"In your own words, what has been the effect of the expatriate assignment on your career ?"

Effect of the assignment on the partner's career	% of 33
Negative	60.6
Neutral	15.2
Positive	24.2

Table 5.47 Partner's Encouragement (Question P1.8)

Partner's encouragement	% of 54
I was not consulted when my partner accepted the expatriate assignment	1.9
On balance I discouraged my partner from accepting the assignment	1.9
On balance I neither encouraged nor discouraged my partner in accepting the expatriate assignment	13.0
On balance I encouraged by partner to accept the expatriate assignment	83.3

Table 5.48 Significance of the expatriate community (Question P3.3)

Significance of the expatriate community	% of 54
The expatriate community is large enough to influence the type and availability of, for example, foods and shopping facilities, medical facilities, schools and recreational opportunities.	18.5
The expatriate community is visible, but not large enough to modify the local environment significantly.	31.5
The expatriate community is insignificant or non-existent.	50.0

Table 5.49 Social interaction with host nationals (Question P3.4)

Social activity with host nationals	% of 54
Almost none with host nationals. Nearly all with other expatriates	35.2
One quarter with host nationals. Three quarters with other expatriates	22.2
About half and half	18.5
Three quarters with host nationals. One quarter with other expatriates	18.5
Nearly all with host nationals. Almost none with other expatriates	5.6

Table 5.50 Partner's perceived role (Question P3.5)

"In your own words, please describe your role as an expatriate's partner. What do you consider to be your main functions and responsibilities?"

Partner's perceived role	% of 48
To make my own life, independent of my partner's	8.3
My role overseas is very similar to my role back home.	16.7
To support by partner's business activity by e.g. entertaining	16.7
To manage the home	35.4
To support my partner	50.0

(These sum to more than 100% because multiple responses were allowed)

Table 5.51 Partner's International adjustment (Question P3.6)

"Please consider how easy or difficult you found it to adjust to each aspect [of the international assignment]"

Aspect of the overseas environment	Percentage of respondents				
	Ease or difficulty of adjustment				
	Very Easy	Easy	Neutral	Difficult	Very Difficult
Interacting with host nationals on a day-to-day basis	20.8	41.5	24.5	7.5	5.7
Everyday customs	19.2	59.6	19.2	1.9	
General living conditions	35.2	44.4	9.3	7.4	3.7
How host nationals view expatriates	9.6	44.2	30.8	9.6	5.8
How host nationals view women	15.1	49.1	13.2	9.4	13.2
Socialising with host nationals	25.9	29.6	27.8	7.4	9.3
Interaction with the expatriate community	48.1	40.4	3.8	3.8	3.8
Climate	24.1	50.0	22.2	3.7	
Shopping	33.3	48.1	16.7		1.9
Transport	27.8	38.9	22.2	5.6	5.6
Home help	30.4	39.1	15.2	8.7	6.5
Medical facilities	29.6	33.3	20.4	5.6	11.1

Table 5.52 Repatriation adjustment (Questions P4.1, P4.2)

"How easy was it for you/for your children to adjust to the environment back home after the expatriate assignment ?"

Readjustment to the home environment	Percent of respondents				
	Ease or difficulty of adjustment				
	Very Easy	Easy	Neutral	Difficult	Very Difficult
For the partner (% of 51)	29.4	29.4	11.8	17.6	11.8
For the child(ren) (% of 32)	40.6	40.6	9.4	6.3	3.1

Table 5.53 Comparison: International/Repatriation adjustment (Questions P4.3, P4.4)

"Was it easier or harder for you/your children to adjust to the expatriate country than it was to readjust to the environment back home ?"

Comparison of international and repatriation adjustment	International Adjustment			Repatriation Adjustment	
	Much Easier	Easier	About the same	Much Easier	Easier
For the partner (% of 51)	18.0	16.0	24.0	26.0	16.0
For the child(ren) (% of 32)	7.4	22.2	33.3	18.5	18.5

Table 5.54 Partner choose to live overseas again (Question P4.5)

"Would you choose to live overseas again ?"

Choose to live overseas	% of 46
Definitely Not	2.0
Probably Not	6.0
Don't know	12.0
Yes, probably	30.0
Yes, definitely	50.0

5.2 Case Rejection for Sample Homogeneity

Questions 1.3, 1.5, 2.2, 2.3 and 2.4 were used specifically to reject cases that were not members of a specific population. By this means, the remaining respondents would be British, would have been selected for an international assignment internally by their employing organisations with the expectation that they would return to and be re-established within that organisation, and would have returned to that organisation at the conclusion of the assignment.

The responses to those questions are shown below:

Question 1.3 asked the respondents Nationality, in order that only British respondents would be included in data analysis.

Nationality	% of 322
British	84.5
European	11.4
Other	4.1

The responses to that question appear in Table 5.2 and are reproduced here. Of the 322 respondents, 272 were British.

Question 2.2 asked respondents to describe their employment status at the time that they were selected for the international assignment.

Employment Status	% of 322
Employed	94.9
Self Employed	1.3
Unemployed	2.8
Student	0.9

The responses to that question appear in Table 5.9 and are reproduced here.

Of the 322 respondents, 305 were in employment at the time of their selection.

Question 2.3 asked respondents to describe how they had been recruited for the international assignment.

How Recruited	% of 322
Internally	83.8
Joined the organisation for the assignment	10.2
Recruited by an agency	2.2
Other	3.8

The responses to that question appear in Table 5.11 and are reproduced here.

Of the 322 respondents, 270 had been recruited internally, by the organisation that was employing them at the time.

Question 2.4 asked respondents how, at the time of their selection for the international assignment, they had been expected to be employed at the conclusion of the assignment.

The responses to that question appear in Table 5.12 and are repeated here.

Of the 322 respondents, 306 expected to return to employment within their home-based organisation.

Anticipated Redeployment	% of 322
Return to the home-base organisation	94.9
Return to some form of employment	1.3
Become self employed	2.8
Become unemployed	0.9
Other	0.0

As a result of the collaboration with the Centre for International Briefing (described in Chapter 4 above), not all respondents had returned from an international assignment. Some had been selected for assignment but had not yet departed. Others were still on assignment.

Current Status	% of 322
Selected for an assignment	4.8
On assignment	53.0
Returned from an assignment	42.2

Question 1.5 asked respondents about the stage of expatriation that they had reached.

The responses to that question appear in Table 5.3 and are reproduced here. Of the 322 respondents, 136 had returned from an international assignment.

When the responses to these five questions were considered together, then of the 322 cases, only 96 met the following criteria:

- Nationality is "British" (question 1.3)
- Expatriate Status is "Returned" (question 1.5)
- Employment Status when selected was "Employed" (question 2.2)
- Method of Recruitment for the assignment was "Internally" (question 2.3)
- Expected Deployment on Return was "Return to Organisation" (question 2.4)

and those 96 cases were chosen for statistical examination within this study.

All other cases were rejected.

5.3 Characteristics of Participants and their Assignments

This section provides a brief summary of the characteristics of the individuals who took part in this study and their assignments. The detailed responses to the questionnaire are tabled in section 5.1 above.

Common characteristics

All 96 participants were British, and had returned to their employing organisation from an international assignment for which they had been selected internally.

Gender

The majority (nearly 90%) of the participants in this study were male. This is consistent with numerous previous surveys (e.g. Harris 1995) which have found only small numbers of female international assignees.

Marital Status

Almost 70% of the participants were married. Nevertheless, the majority of participants (60%) had no dependent children.

Age

Participant ages ranged from 23 to 57, with a mean of 39.1 years.² Over 40% of participants were in their twenties, and another 35% in their thirties.

² It is interesting to compare the mean age of participants in this study (39.1 years) with previous studies of international assignees:

Figure 5.4 Participant ages, this and other studies

<u>Study</u>		<u>Assignee Nationality</u>	<u>Mean Age (Years)</u>
Adler	(1980)	Mainly Canadian	49.4
Torbiorn	(1982)	Swedish "36-40": say, 38	
Black	(1988)	US	46
Dunbar	(1989)	US	42.5
Black	(1990)	US	43.9
Black & Gregersen	(1991c)	US	44.5
Forster	(1994)	British	43
Pickard	(this study)	British	39.1

These data appear to support Scullion's (1992) finding of a trend towards giving younger employees the opportunity for international experience earlier in their careers. It is unclear, however, whether Torbiorn's figure is an outlier, or whether Europeans tend to undertake international assignments at an earlier age than North Americans, or whether these apparent differences between European and North American studies are simply methodological.

Tenure within the organisation

The mean tenure within the organisation was 7.3 years. Less than 40% of the participants had worked for their current organisation for more than 5 years. Only about one-fifth had been with their organisation for more than 10 years

Educational Qualifications

Participants were comparatively well educated, nearly 70% being qualified to university degree level. Nearly half the participants were involved in finance, administration or management, and another 21% were technical specialists.

Prior expatriate experience

For nearly 70% of participants, this was their first international assignment.

Destination

31% of participants were assigned to North America, and another 30% to Asia, with the remainder dispersed across the world.

Planned Duration

The shortest planned duration was 6 months, and the longest 4 years: the mean planned duration was 2 years 3 months.

Respondents were free to answer this question with any whole number of months, but all answered with a multiple of six months. Two years (33%) and three years (24%) were particularly frequent.

Selection: Subjects discussed between assignee and organisation.

It is interesting to list the subjects discussed between the assignees and their organisations at the time of selection, in descending order of frequency:

Salary and allowances during the assignment	91.7%
Duties and responsibilities during the assignment	87.5%
Position of partner during the assignment	77.9%
The foreign culture and environment	72.9%
The assignment work environment	71.6%
Why this individual had been selected	64.6%
Career prospects	59.4%
Preparation and training for the assignment	54.2%
Job that assignee would have on return	31.2%

indicating that organisations tended to discuss the forthcoming assignment and the practical aspects of expatriation in some detail, but gave less attention to the individual and the long-term affects of the assignment upon the assignee and the assignee's career. This finding is in general agreement with the literature (see page 83).

Selection: Expectations

Assignees' expectations are the focus of this study, and are examined in considerable detail in sections 5.4 and 5.5 that follow.

At the time that they were selected for the international assignment, assignees indicated the following expectations:

The assignment will be challenging and/or exciting	97.9%
The assignment will be a learning opportunity	96.9%
The assignment will enhance career prospects	74.0%
The assignment will be financially rewarding	61.5%

Sojourn: Communication Links

Assignees rated organisational communication to be effective about a number of subjects as follows:

Organisational aims and strategies	64.9%
Departmental aims and strategies	55.8%
Departmental personnel changes	53.2%
Organisational personnel changes	52.1%
Departmental job opportunities	20.7%
Organisational job opportunities	17.3%

This finding is in general agreement with the literature's "out of sight, out of mind" emphasis (see page 84).

Nearly half of the assignees found their organisational communication links ineffective in keeping them up to date with what was happening at home.

In addition, it appears that, as was the case at the time of selection, the organisation communicated more (or more effectively) about the subjects of interest to the organisation itself (e.g. corporate aims) and less or less effectively about the subjects of direct interest to the individual assignee (e.g. job opportunities).

Actual Duration

Only 30% of assignments lasted exactly as long as planned, about 34% being curtailed early, and about 34% being extended. Actual assignment durations ranged from 4 months to almost 5 years, with a mean of 2 years 2 months.

Pre-Return Expectations

Assignees' expectations are the focus of this study, and are examined in considerable detail in sections 5.4 and 5.5 that follow.

At the time that they were about to return to their home base from the foreign assignment, assignees indicated the following expectations:

The return will enhance career prospects	61.1%
The return will be challenging and/or exciting	57.7%
The return will be a learning opportunity	39.0%
The return will be financially rewarding	25.3%

Post-Return Discussion and Debriefing

Returnees reported that, following return to their home base, they discussed a number of subjects with their organisation, with the following frequencies:

Deployment of the assignee	90.5%
Salary and allowances	84.1%
Organisational aims and strategies	73.4%
Departmental aims and strategies	70.2%
Departmental changes	62.8%
Career prospects	60.6%
Assignee's overseas achievements	52.1%
What assignee learned during the assignment	47.9%

Again, this is generally consistent with the literature (see page 78) and generally consistent with other findings in this study. The organisation tended to discuss the immediate, practical aspects of the individual's reestablishment: deployment and salary. Most organisations discussed the subject of interest to the organisation: the organisation itself. The organisation displayed less interest in the individual, so that nearly half appeared to remain ignorant about what the individual had achieved during the overseas assignment and about what skills and experiences the individual had acquired on assignment.

Post-Return Assessment

Following their return to and reestablishment with their home-based organisation, assignees assessed their situation as follows:

Pleased that accepted the international assignment	94.8%
Would recommend a colleague to accept such an assignment	90.7%
Assignment has increased potential usefulness to employer	82.3%
Current job is suitable for talents and expertise	54.2%
Satisfied with status of current job	53.2%
Satisfied with autonomy in current job	51.0%
Satisfied with responsibility in current job	41.7%
Current job utilises skills/experience acquired overseas	39.6%
Career has been enhanced in the short term	37.5%

It is interesting to note that only about one half of the respondents indicated satisfaction with their current job, most respondents felt that the job did not make use of the skills they had acquired abroad, and not much more than a third felt that their career had been enhanced by the assignment, in the short term. Nevertheless, most felt that their potential usefulness had been enhanced, and nearly all were pleased that they had accepted the assignment.

Post-Return Expectations

Assignees' expectations are the focus of this study, and are examined in considerable detail in sections 5.4 and 5.5 that follow.

Following their return to the home base and reestablishment within the home organisation, 65.6% of assignees expected the assignment to provide long-term career enhancement in the future.

5.4 Examination of the Propositions.

This section examines the extent to which each proposition in turn is supported by the data.

5.4.1 Research Question 1

The first research question asks:

What work- and career-related expectations do individuals generate before, during and after an expatriation assignment ?.

Propositions 1 through 9 were formulated in order to address that question.

Proposition 1: Motive (Career)

Proposition 1. Assignees, at the time of their selection, will generally expect the international assignment to enhance their career prospects.

This proposition is addressed directly by question 2.8d, by asking respondents to agree with the following statement: *At the time of selection for the international assignment I expected the assignment to improve my career prospects.*

The answers appear in Table 5.17 and are reproduced here:

Perception at the time of selection		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
2.8d	I expect the assignment to improve my career prospects		6.3	19.8	36.5	37.5

The data provide strong support for this proposition. 74% of respondents were motivated to accept their international assignment by (inter alia) an expectation that the assignment would improve their career prospects. Only about 6% reported negative career-related expectations

Proposition 2: Motive (Challenge)

Proposition 2. Assignees, at the time of their selection, will generally expect the international assignment to be challenging or exciting.

This proposition is addressed directly by question 2.8c, by asking respondents to agree with the following statement: *At the time of selection for the international assignment I expected the assignment to be challenging and/or exciting.*

The answers appear in Table 5.17 and are reproduced here:

Perception at the time of selection		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
2.8c	I expect the assignment to be challenging and/or exciting			2.1	35.4	62.5

The data fully support this proposition. Almost 98% of respondents were motivated to accept their international assignment by expectations of challenge or excitement. No participants indicated negative expectation.

Proposition 3: Motive (Development)

Proposition 3. Assignees, at the time of their selection, will generally expect the international assignment to be an opportunity for learning and development.

This proposition is addressed directly by question 2.8j, by asking respondents to agree with the following statement: *At the time of selection for the international assignment I expected to learn from the assignment*

The answers appear in Table 5.17 and are reproduced here:

Perception at the time of selection		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
2.8j	I expect to learn from the assignment			3.1	47.9	49.0

Proposition 4: Motive (Money)

Proposition 4: Assignees, at the time of their selection, will generally expect the assignment to be financially rewarding.

This proposition is addressed directly by question 2.8b, by asking respondents to agree with the following statement: *At the time of selection for the international assignment I expected the assignment to*

be financially rewarding

The answers appear in Table 5.17 and are reproduced here:

Perception at the time of selection		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
2.8b	I expect the assignment to be financially rewarding	2.1	9.4	27.1	44.8	16.7

Perception at the time of selection		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
2.8b	I expect the assignment to be financially rewarding	2.1	9.4	27.1	44.8	16.7

Proposition 5: Expectation (Career)

Proposition 5: Assignees, immediately prior to their return to the home base, will generally expect the return to enhance their career prospects.

This proposition is addressed directly by question 6.7d, by asking respondents to agree with the following statement: *In the last few days of the assignment, when I knew my return to me imminent, I expected the return to home base to enhance my career prospects.*

The answers appear in Table 5.39 and are reproduced here:

Pre-return expectations		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
6.6d	I expect the return to my home base to enhance my career prospects	3.2	16.8	18.9	45.3	15.8

Proposition 6: Expectation (Challenge)

Proposition 6: Assignees, immediately prior to their return to the home base, will generally expect the return to be challenging or exciting.

This proposition is addressed directly by question 6.7b, by asking respondents to agree with the following statement: *In the last few days of the assignment, when I knew my return to me imminent, I expected the return to home base to be exciting and/or challenging*

The answers appear in Table 5.39 and are reproduced here:

Pre-return expectations		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
6.7b	I expect the return to my home base to be exciting and/or challenging	7.4	14.7	23.2	44.2	10.5

Proposition 7: Expectation (Development)

Proposition 7. Assignees, immediately prior to their return to the home base, will generally expect the return to be an opportunity for learning and development.

This proposition is addressed directly by question 6.7c, by asking respondents to agree with the following statement: *In the last few days of the assignment, when I knew my return to me imminent, I expected the return to home base to provide skill or experience that I lack.*

The answers appear in Table 5.39 and are reproduced here:

Pre-return expectations		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
6.7c	I expect the return to my home base to provide skill/experience that I lack	3.2	23.2	34.7	31.6	7.4

Proposition 8: Expectation (Money)

Proposition 8: Assignees, immediately prior to their return to their home base, will generally expect the return to be financially rewarding.

This proposition is addressed directly by question 6.7a, by asking respondents to agree with the following statement: *In the last few days of the assignment, when I knew my return to me imminent, I expected the return to home base to be financially rewarding.*

The answers appear in Table 5.39 and are reproduced here:

Pre-return expectations		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
6.7a	I expect the return to my home base to be financially rewarding	20.0	31.6	23.2	23.2	2.1

Proposition 9: Expectation (Long-Term)

Proposition 9: Assignees, following return to their home-based organisation, will generally expect their future career prospects to have been enhanced by the international assignment.

This proposition is addressed directly by question 7.1n, by asking respondents to agree with the following statement: *The expatriate assignment has enhanced my long-term career prospects.*

The answers appear in Table 5.41 and are reproduced here:

Post-return assessment of the assignment		Percentage of participants				
		Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
7.1n	The expatriate assignment has enhanced my long-term career prospects	3.1	12.5	18.8	42.7	22.9

5.4.2 Research Question 2.

The second research question asks

"How are the expectations of international assignees affected by organisational actions ?".

Propositions 10 through 15 were formulated in order to address that question.

Proposition 10: Formality of the selection process.

Proposition 10: The use of more formal selection methods will be associated with less positive career-related expectations.

The formality of the selection process, and the participants in the selection process were elicited in questions 2.11, 2.12 and 2.13.

The responses to those questions appear in Tables 5.20, 5.21 and 5.22.

Table 5.55: Correlations: Formality of the selection process

Question	Coding	Correlations (Significance 0.01 or better)											
		Motives				Expectations							
		Career	Challenge	Development	Money	Career	Challenge	Development	Money	Long Term			
2.11 Formality of the selection process	0 = Informal 1 = Mixed 2 = Formal					+ 0.275							
2.12 Final selection decision made by Line Manager Personnel Department Directors International Department Destination Management	0 = No, 1 = Yes ditto ditto ditto ditto												
2.13 Selection process included Line Manager Personnel Department Directors International Department Destination Management	0 = No, 1 = Yes ditto ditto ditto ditto	+ 0.282							+ 0.265				

The data do not support this proposition. Such scattered, low-level correlations serve only to obscure the general lack of relationship between the selection process on the one hand, and the assignee's motives for accepting the assignment and expectations of return on the other.

Επισημάνσεις οι οποίες θα τηρήσει

επισημάνσεις παραμένει για τον σκοπό της παρούσας μελέτης. Η επισημάνση των

Κατηγορία	Περιγραφή	Αριθμός	Ποσοστό	Σημείωση
1	Επισημάνσεις που αφορούν την	10	100%	
2	Επισημάνσεις που αφορούν την	5	50%	
3	Επισημάνσεις που αφορούν την	3	30%	
4	Επισημάνσεις που αφορούν την	2	20%	
5	Επισημάνσεις που αφορούν την	1	10%	
6	Επισημάνσεις που αφορούν την	0	0%	
7	Επισημάνσεις που αφορούν την	0	0%	
8	Επισημάνσεις που αφορούν την	0	0%	
9	Επισημάνσεις που αφορούν την	0	0%	
10	Επισημάνσεις που αφορούν την	0	0%	
11	Επισημάνσεις που αφορούν την	0	0%	
12	Επισημάνσεις που αφορούν την	0	0%	
13	Επισημάνσεις που αφορούν την	0	0%	
14	Επισημάνσεις που αφορούν την	0	0%	
15	Επισημάνσεις που αφορούν την	0	0%	
16	Επισημάνσεις που αφορούν την	0	0%	
17	Επισημάνσεις που αφορούν την	0	0%	
18	Επισημάνσεις που αφορούν την	0	0%	
19	Επισημάνσεις που αφορούν την	0	0%	
20	Επισημάνσεις που αφορούν την	0	0%	

Πίνακας 12: Κατανομή των επισημάνσεων

Επισημάνσεις οι οποίες θα τηρήσει
 επισημάνσεις παραμένει για τον σκοπό της παρούσας μελέτης. Η επισημάνση των

Επισημάνσεις οι οποίες θα τηρήσει
 επισημάνσεις παραμένει για τον σκοπό της παρούσας μελέτης. Η επισημάνση των

Επισημάνσεις οι οποίες θα τηρήσει

Proposition 11: Repatriation planning at the time of selection

Proposition 11: Repatriation planning or discussion at the time of selection will be associated with less positive career-related expectations.

The presence or absence of repatriation planning at the time of selection was elicited in questions 2.6, 2.8l, and 2.10 (d, g and h).

The responses to those questions appear in Tables 5.14, 5.17 and 5.19

Table 5.56: Correlations: Repatriation planning at the time of selection

Question	Coding	Correlations (Significance 0.01 or better)											
		Motives					Expectations						
		Career	Challenge	Development	Money	Career	Challenge	Development	Money	Long Term			
2.6 The duration of the assignment was defined at the time of selection	0 = No 1 = Yes												
2.8l I believe that my selection shows that my achievements and/or track record were recognised and appreciated by my organisation.	1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree	+ 0.532		+ 0.292		+ 0.382	+ 0.341	+ 0.289	+ 0.382			+ 0.335	
2.10d Selection discussion included the subject of Career Prospects	0 = Not at all 1 = To some Extent 2 = In Depth	+ 0.414		+ 0.278		+ 0.370	+ 0.388	+ 0.351	+ 0.392			+ 0.407	
2.10g Selection discussion included the subject of the job to which I would return.	ditto	+ 0.276					+ 0.274		+ 0.444				
2.10h Selection discussion included the reason that I had been selected for the assignment	ditto	+ 0.274							+ 0.305				

The data indicate precisely the opposite of this proposition: evidence of advanced planning and consideration of the eventual return are associated with more positive career- and work-related motives for accepting the assignment, and with more positive career- and work-related expectations at the time of return.

Assignees who perceive their selection as recognition for past achievement are more likely to report career enhancement as a motive for accepting the assignment:

		Percentage of participants		
		Believe selection = recognition		
		Disagree	Neutral	Agree
Motive (Career)	Negative	2.1	2.1	2.1
	Neutral	3.1	5.2	11.5
	Positive	3.1	7.3	63.5

and tend to report higher expectations of career enhancement, challenge, development and financial reward at the time of return. Following return, such individuals are more likely to expect career enhancement to continue in the long term.

Similarly, assignees who discuss their career prospects during the selection process are more likely to report career enhancement as a motive for accepting the assignment:

		Percentage of participants		
		Discuss Career Prospects		
		Not at all	Some extent	In Depth
Motive (Career)	Negative	6.3		
	Neutral	10.4	9.4	
	Positive	24.0	44.8	5.2

and similarly more likely to hold positive job- and career related expectations at and after return.

Interestingly, two subjects discussed at the time of selection are associated with higher expectations of financial reward at return. Assignees who, at the time of selection, discuss the job that they will have on return, are more likely to report positive expectations of financial reward at return:

		Percentage of participants		
		Discuss Job on Return		
		Not at all	Some extent	In Depth
Expectation (Money)	Negative	46.3	5.3	
	Neutral	9.5	12.6	1.1
	Positive	12.6	11.6	1.1

and similarly, assignees who discuss the reasons for their selection are more likely to report expectations of financial reward at the time of return:

		Percentage of participants		
		Discuss Reasons for Selection		
		Not at all	Some extent	In Depth
Expectation (Money)	Negative	26.3	23.2	2.1
	Neutral	6.3	13.7	3.2
	Positive	3.2	18.9	3.2

The data indicate, therefore, that assignees who, at the time of selection, discuss or plan the eventual return with their organisation, are more likely to have positive career-related motives for accepting the assignment, and more likely to have positive job- and career-related expectations when they return.

Proposition 12: Pre-departure training and preparation

Proposition 12: The provision of pre-departure training and preparation will be associated with more positive career-related expectations immediately prior to return from the assignment.

Information about pre-departure training and preparation was elicited in questions 3.1, 3.2, 3.3 and 3.4.

The responses to these questions appear in Tables 5.23, 5.24 and 5.25

Question 3.1 asked how many weeks elapsed between the time of selection and the departure for assignment.

Questions 3.2 and 3.3 asked respondents whether any of the following types of training had been provided:

<u>Job-Related Training</u>	- for the assignee
<u>Language Training</u>	- for the assignee
<u>Cultural Training</u>	- for the partner
<u>Language Training</u>	- for the child or children
<u>Familiarisation Visits</u>	
<u>Meetings with recent returnees</u>	

Question 3.4 asked respondents to quantify the amount of time that had been occupied by pre-departure training and preparation.

The data do not show any relationship between evidence for pre-departure training and preparation on the one hand, and motivation for accepting the assignment or pre-return expectations on the other hand.

Accordingly, the data refute this proposition

Proposition 13: Continued links between assignee and organisation

Proposition 13: Continued links and communication between the international assignee and the home based organisation throughout the assignment may affect the assignee's expectations immediately prior to return.

Links between assignee and home-based organisation during the international assignment were elicited in questions 5.1, 5.3, 5.4, 5.5, 5.6, 5.7.

The responses to these questions appear in Tables 5.26, 5.27, 5.28, 5.29, 5.30 and 5.31

Question 5.1 asked how frequently the assignee returned home for business reasons during the assignment.

Question 5.3 asked whether the assignee had a person or department with who they could discuss their career, during the assignment.

Question 5.4 asked how frequently the assignee was visited by home-based personnel during the assignment.

Question 5.5 asked respondents to identify methods and communication channels that had been used to keep them informed about the home-based organisation during the assignment.

Question 5.6 asked respondents to estimate how effectively they had been kept informed about their home-based department, and their organisation as a whole.

Question 5.7 asked respondents whether there had been a performance appraisal mechanism in place during the assignment.

Only one relationship appears in the data: assignees who pay more frequent return visits to the home base for business reasons during the assignment appear less likely to expect the eventual return to be financially rewarding.

Table 5.57: Correlations: Frequency of return visits

Question	Coding	Correlations (Significance 0.01 or better)				
		Expectations				
		Career	Challenge	Development	Money	Long Term
5.1 During the assignment, how often did you return to your home base for business reasons	0 = Never 1 = Annually 2 = Six-Monthly 3 = Quarterly 5 = Monthly				- 0.360	

With that exception, evidence for the presence or absence of communication media between assignee and organisation during the assignment does not appear to affect the assignee's eventual expectations of return.

Accordingly, the data refute this proposition.

Proposition 14: Planning and preparation for the return

Proposition 15: Involvement of line manager in return planning

Proposition 14: Planning and preparation for the assignee's return to the home organisation will be associated with less positive work- and career-related expectations.

Evidence for the presence or absence of pre-return planning and preparation were elicited in questions 6.2, 6.3, 6.6, 6.8, 7.2, 7.3, 7.4 and 7.5.

The responses to those questions appear in Tables 5.34, 5.35, 5.36, 5.38, 5.40, 5.42, 5.43, 5.44 and 5.45.

Proposition 15: The involvement of the assignee's departmental line management in planning and preparing for the return will be associated with less positive work- and career-related expectations of return.

Question 6.2 asked respondents to quantify how far in advance a date for return had been fixed.

Question 6.3 asked respondents whether they had had a choice about returning to the home base at that time.

Question 6.6 asked what department or departments had been involved in pre-return discussion.

Question 6.8 asked the returnee how much they knew about the job to which they were about to return

Question 6.9 asked what subjects were addressed, and in what depth, in post-return discussion.

Question 7.3 asked what department or departments had been involved in post-return discussion.

Question 7.4 asked respondents to quantify the time that elapsed between the time they returned and the time that they settled into a position.

Question 7.5 asked whether the returnee had been placed on extended leave, on a temporary assignment or an unsuitable assignment, and whether the assignee had resigned.

Table 5.58: Correlations: Pre-return planning

Question	Coding	Correlations (Significance 0.01 or better)				
		Expectations				
		Career	Challenge	Development	Money	Long Term
6.2 Notice of a definite date for return	Months					
6.3 Had a choice about returning at this time	0 = No, 1 = Yes		+ 0.327		+ 0.288	
6.6 Pre-return discussion with Management in host country	0 = No, 1 = Yes					
Home-based department	ditto				+ 0.304	
Home-based personnel dept	ditto					
International department	ditto					
6.8 Pre-return knowledge about the job to which would be returning	0 = No idea 1 = Approximate 2 = Exact					
7.2 Discussion about	0 = Not at all 1 = To some extent 2 = In depth					
Achievements	ditto					
Learning	ditto					
Departmental changes	ditto				+ 0.277	
Department strategy	ditto					
Organisational strategy	ditto		+ 0.350			
Post-return deployment	ditto					
Salary and allowances	ditto					+ 0.422
Career prospects	ditto					
7.3 Involved in discussion	0 = No, 1 = Yes				+ 0.312	+ 0.276
Line manager	ditto					
Personnel department	ditto					
International department	ditto					
Director(s)	ditto					
Nobody	ditto					
7.4 Time elapsed between return and final position	Days					- 0.282
7.6 Occurrences	0 = No, 1 = Yes					
Extended leave	ditto					
Temporary assignment	ditto					
Unsuitable assignment	ditto					
Resignation	ditto					

The data indicate that pre-return planning:

- that includes the assignee's home-based line manager
- that includes the assignee's home-based department
- that discusses changes to the home-based department
- and that offers the assignee a choice about returning now or later

is associated with more positive expectations of financial reward at return.

Otherwise, however, no general relationship between pre-return planning and pre-return expectation emerges from the data and, in general, these propositions are not supported by the data.

5.4.3 Research Question 3

The third research question asks

"What other factors affect the expectations of international assignees ?"

Propositions 16 through 29 were formulated in order to address that question

Proposition 16: Age

Proposition 16: Younger assignees will have more positive work- and career-related expectations.

The assignee's age is elicited in question 1.6a. A related factor, the assignee's tenure within the organisation, is elicited in question 2.2

The responses to these questions appear in Table 5.4, in Figure 5.1 and in Table 5.10

Table 5.59: Correlations: Age and Tenure

Question	Coding	Correlations (Significance 0.01 or better)								
		Motives				Expectations				
		Career	Challenge	Development	Money	Career	Challenge	Development	Money	Long Term
1.6a Age of the assignee	Years	- 0.338		- 0.376	+0.389	- 0.341		- 0.326	- 0.291	- 0.542
2.2 Tenure with the organisation	Years			- 0.281				- 0.279		- 0.467

The data indicate that age is an important factor affecting both motivation to accept an international assignment and pre-return expectations at the conclusion of that assignment.

Age is a significant variable in determining the motives that cause individuals to accept an international assignment, and in determining their expectations on return to the home-based organisation:

Table 5.60: Age as a significant variable

Percentages of participants in this age group → having this characteristic	Age 20-29	Age 30-39	Age 40+
Motive to accept assignment (Career)	78.0	76.5	65.0
Motive to accept assignment (Challenge)	97.6	97.1	100.0
Motive to accept assignment (Development)	100.0	97.7	90.0
Motive to accept assignment (Money)	34.1	82.4	85.0
Expectation at return (Career enhancement)	70.7	66.7	35.0
Expectation at return (Challenge)	61.0	48.5	55.0
Expectation at return (Development)	51.2	45.5	5.0
Expectation at return (Money)	39.0	15.2	15.0
Long-term expectation of career enhancement	85.4	67.6	66.3

The age of the assignee is related to a number of other assignee characteristics, as shown below:

Table 5.61: Age and other characteristics

Percentages of participants in this age group → having this characteristic	Age 20-29	Age 30-39	Age 40+
Assigned to North America	55.6	16.1	6.3
Assigned to Asia	11.1	32.2	68.8
Educated at least to university degree level	87.8	58.8	50.0
Assignment planned to last longer than 2 years	12.2	52.9	60.0
The assignee actively sought the assignment	87.8	35.3	35.0
At the time of selection, assignee discussed career	78.0	58.8	25.0
At the time of selection, discussed job to fill on return	46.3	26.5	10.0

Proposition 17: Gender

Proposition 17: The work- and career-related expectations of male and female international assignees are not significantly different.

The assignee's gender is elicited in question 1.2

Responses to this question appear in Table 5.1

The data do not indicate any relationship between gender on the one hand, and motivation to accept the assignment or pre-return expectation on the other hand.

Accordingly, the data fully support this proposition.

Proposition 18: Marital status

Proposition 18: The work- and career-related expectations of married and single international assignees are not significantly different.

The assignee's marital status is elicited in question 1.6b.

A related question, the number of the assignee's dependent children, is elicited in question 1.6c

Responses to these questions appear in Tables 5.5 and 5.6

Table 5.62: Correlations: Marital status and children

Question	Coding	Correlations (Significance 0.01 or better)												
		Motives					Expectations							
		Career	Challenge	Development	Money	Career	Challenge	Development	Money	Long Term				
1.6b Married status	0 = Not Married 1 = Married				+0.382									
1.6c Dependent children	Number				+0.300						-0.266			-0.321
1.6c Dependent children	0 = No children 1 = 1 child or more				-0.316						-0.258		-0.275	-0.360

The data indicate that married assignees are more likely to be motivated to accept an international assignment by expectations of immediate financial reward.

Assignees having one or more dependent child are less likely to be motivated to accept an international assignment by expectations of development and more likely to be motivated by expectations of immediate financial reward. They are also less likely to expect the eventual return to be developmental or financially rewarding, and less likely to expect long-term career enhancement from the assignment.

The data therefore refute this proposition in one respect: that married assignees, and assignees having dependent children, are more likely to be motivated by immediate financial reward than single or childless assignees.

Proposition 19: Partner Encouragement

Proposition 19: Partner encouragement to accept an overseas assignment will be associated with more positive assignee work- and career-related expectations.

The extent to which the assignee's partner encouraged or discouraged acceptance of the international assignment is elicited in the Partner's Questionnaire, question 1.8

Responses to this question appear in Table 5.47

The data do not indicate any relationship between partner encouragement on the one hand, and motivation to accept the assignment or pre-return expectation on the other hand.

Accordingly, the data refute this proposition.

Proposition 20: Educational Qualifications

Proposition 20: Assignees with higher educational qualifications will have more positive work- and career-related expectations.

The assignee's educational qualifications are elicited in question 1.7.

Responses to that question appear in Table 5.7

The data do not indicate any relationship between partner encouragement on the one hand, and motivation to accept the assignment or pre-return expectation on the other hand.

Accordingly, the data refute this proposition.

Proposition 21: Prior expatriate experience

Proposition 21: Assignees on their first expatriate assignment will have more positive work- and career-related expectations than those on their second or subsequent international assignment

Question 2.7 asks whether the assignee has prior expatriate experience. The responses to that question appear in Table 5.16

Table 5.63: Correlations: Prior expatriate experience

Question	Coding	Correlations (Significance 0.01 or better)								
		Motives				Expectations				
		Career	Challenge	Development	Money	Career	Challenge	Development	Money	Long Term
2.7 Prior expatriate experience	0 = First assignment 1 = Prior experience	-0.283			+0.301				-0.350	-0.306

The data support this proposition to some extent. The data indicate that assignees having prior expatriate experience are less likely to be motivated to accept an international assignment by expectations of career enhancement, and more likely to be motivated by expectations of immediate financial reward. Assignees having prior expatriate experience are less likely to expect their eventual return to be financially rewarding, and less likely to expect long-term career enhancement from the assignment.

The effects of prior expatriate experience upon motives and expectations is shown below:

Table 5.64: Prior expatriate experience as a variable

Percentages of participants with or without prior expatriate experience → having this characteristic	First Expatriate Assignment	Prior Expatriate Experience
Motive to accept assignment (Career)	80.3	58.6
Motive to accept assignment (Challenge)	97.0	100.0
Motive to accept assignment (Development)	98.5	93.1
Motive to accept assignment (Money)	51.5	82.8
Expectation at return (Career enhancement)	68.2	42.9
Expectation at return (Challenge)	59.1	42.9
Expectation at return (Development)	42.4	32.1
Expectation at return (Money)	33.3	7.1
Long-term expectation of career enhancement	77.3	37.9

Proposition 22: "Push" and "pull" motives

Proposition 22: Assignees who accept an international assignment for "push" motives relating to dissatisfaction with one or more elements of their current job or career progression will have less positive career-related expectations than assignees who accept an international assignment for "pull" motives relating to learning and development.

Open question 2.9 asks "In your own words, please explain WHY you accepted this assignment".

The coded responses to that question appear in Table 5.18

The answers to this question included several recurring themes, not necessarily mutually exclusive. After some consideration they appeared to break into four categories, as follows:

Personal reasons. A surprisingly small number of responses mentioned money as a reason for acceptance, and money was very seldom indicated as the only reason for acceptance. A larger proportion of assignees indicated a desire to travel. This was often quite unspecific, as "I wanted to travel", and occasionally indicated a specific interest in the destination, as "I had always wanted to visit Australia". Responses of this nature appeared to have no relationship to the assignee's job or career, and were accordingly labelled "personal".

"Push" Job-related reasons. A small number of respondents mentioned their current job in negative terms, the most striking of response being "To get away from my &*%\$£ of a boss !!", but tending more to describe the current job as mundane or boring. Responses that appeared to indicate an escape from the current job were labelled as "push" job-related.

"Pull" Job-related reasons. A larger number of respondents mentioned the forthcoming overseas job in positive terms rather than denigrating their current position, usually in terms of "challenge". Responses that appeared to indicate a willing acceptance of challenge, autonomy or responsibility were labelled "pull" job-related

Career-related reasons. Nearly a third of the responses indicated a longer-term motive for accepting the assignment, indicating a longer timescale than that of the assignment itself. Some indicated that career progression would be difficult without international experience, or that overseas experience was valued by their employer. Others used the word 'career' specifically, as in "the assignment will be good for my career", or "to enhance my career".

Responses containing a long-term perspective and responses that used the word 'career' in this sense were labelled as "career-related".

Many responses included two or more of these response categories, and it became clear that an individual may accept an international assignment for a mixture of motives. Accordingly, the four categories that had emerged from the responses were first of all placed in ascending order:

Personal reasons having no bearing on the individual's job or career,

"Push" motives, being escape from the current job,

"Pull" motives being attraction to a 'better' job, and

Career-related motives as being most important and longest lasting

and responses containing multiple categories were tabulated as being the highest-ranking of those categories.

A small number of correlations were found between the answers to question 2.9 categorised in this way on the one hand, and individual motives and expectations on the other:

Table 5.65: Correlations: Personal or Work-related motives

Question	Coding	Correlations (Significance 0.01 or better)												
		Motives					Expectations							
		Career	Challenge	Development	Money	Career	Challenge	Development	Money	Long Term				
2.9 Open question: explain why accepted the international assignment (not coded)	0 = No, 1 = Yes ditto ditto ditto ditto													
"Push" (negative) Job reasons														
"Pull" (positive) Job reasons														
"Pull" (positive) career reasons		+ 0.389												+ 0.289
2.9 Open question: explain why accepted the international assignment (coded)	0 = Personal reasons 1 = Job (negative) 2 = Job (positive) 3 = Career (positive)	+ 0.340												+ 0.298

The data indicate that assignees having positive career-related motives for accepting an international assignment are more likely to have career-related motives for accepting an assignment and more likely to generate long-term career-enhancing expectations of that assignment. That is hardly surprising. The data do not, however, indicate that assignees having motives that are primarily personal, or financial, or of a negative ("push") nature generate expectations that are significantly different.

The answers to this open-ended question do not appear to have added significantly to the data captured by question 2.8d ("I expected the assignment to improve my career prospects". Accordingly, the data do not support this proposition.

Proposition 23: Geographical destination

Proposition 23: The work- and career-related expectations of international assignees to different geographical regions will be statistically different.

The assignee's geographical destination is elicited in question 2.5.

The regionalised responses to that question appear in Table 5.13

Table 5.66: Correlations: Geographical destination

Question	Coding	Correlations (Significance 0.01 or better)												
		Motives					Expectations							
		Career	Challenge	Development	Money	Career	Challenge	Development	Money	Long Term				
2.5 Geographical destination	0 = No, 1 = Yes													
Africa	ditto													
Asia	ditto													
Europe	ditto													
North America	ditto	+ 0.327			- 0.396	+ 0.317	+ 0.320					+ 0.456		

The data indicate that the North American experience differs from the experience of assignees to other parts of the world.

Those assigned to North America are more likely to be motivated by career enhancement, and less likely to be motivated by immediate financial reward. They are more likely to expect career-enhancement at return, more likely to expect their return to be challenging, and more likely to expect their career to be financially rewarding.

It is interesting to compare and contrast the characteristics of assignees assigned to North America with those assigned to Asia:

Table 5.67: Geographical destination as variable

Percentages of participants assigned to this destination → having this characteristic	North America	Asia
Motive to accept assignment (Career)	88.5	68.0
Motive to accept assignment (Challenge)	92.3	100.0
Motive to accept assignment (Development)	100.0	92.0
Motive to accept assignment (Money)	23.1	80.0
Expectation at return (Career enhancement)	80.8	45.8
Expectation at return (Challenge)	80.8	54.2
Expectation at return (Development)	57.7	25.0
Expectation at return (Money)	46.2	12.5
Long-term expectation of career enhancement	84.6	44.0

Geographical destination colours more than just the assignee's motives and expectations:

Table 5.68: Geographical destination and assignment characteristics

Percentages of participants assigned to this destination → having this characteristic	North America	Asia
Aged 20 to 29	76.9	16.0
Aged 30 to 39	19.2	40.0
Aged 40 or older	3.8	44.0
Educated at least to university degree level	92.3	68.0
Assignment planned to last longer than 2 years	11.5	60.0
Assignee has previous expatriate experience	3.8	66.7
The assignee actively sought the assignment	80.8	44.0
At the time of selection, assignee discussed career	84.6	52.0
At the time of selection, discussed job to fill on return	69.2	8.0
The actual length of the assignment was exactly as planned	56.0	22.7

The cross-tabulated relationship between planned duration of assignment and expectation of financial reward on return is shown below:

		Percentage of participants	
		Planned duration of assignment	
		24 months or less	25 months or more
Expectation (Money)	Negative	22.1	29.5
	Neutral	21.1	2.1
	Positive	20.0	5.

Proposition 25: Partner international adjustment

Proposition 25: Partner international adjustment will be associated with more positive work- and career-related expectations of the assignee's return to the home organisation.

Partner's question 3.6 asks the partner how easy or difficult they found it to adjust to various aspects of the foreign culture and environment.

Partner's question 4.1 through 4.4 ask how easy or difficult it was for partner and children to readjust to the home

environment after return, and whether adjustment to the foreign culture and environment and culture was easier or harder than the readjustment required at return.

Partner's question 4.5 asks whether the partner would choose to live overseas again.

The responses to these questions appear in Tables 5.51, 5.52, 5.53 and 5.54

The data indicate no relationship between partner international adjustment on the one hand, and assignee expectations of return on the other.

Accordingly, the data refute this proposition.

It will be recalled that the data also refuted proposition 19 ("Partner encouragement to accept an overseas assignment will be associated with more positive assignee work- and career-related expectations"). Indeed, despite devoting an entirely separate questionnaire to the partners of international assignees, no relationship was found between any characteristic or action of the partner and the assignee's expectations.

Forster (1997) may offer some insight here. He noted that the partnerships and families taking part in international assignments were atypical of partnerships in the UK as a whole. They are overwhelmingly heterosexual and primarily based upon formal marriage arrangements. In nearly all partnerships it is the male who is the main breadwinner, and divisions of labour within the home are largely demarcated along traditional gender lines. He suggests that

dual-career partnerships, and partnerships in which male and female roles are less traditional and more 'equal', may be avoiding or refusing international assignments in order not to impact the career of the "trailing" partner.

He suggests that this 'self-selection' of traditional families implies that the female partners of male international assignees generally have surveyed the options open to them, have happily given up work (if indeed they were in work in the first place) and have made a rational and willing decision to take up a 'domestic' option and support their partner's endeavours overseas.

Proposition 26: Presence of an expatriate community

Proposition 26: The existence of a significant expatriate community in the destination country will be associated with more positive work- and career-related expectations of the assignee's return to the home organisation.

Partner's question 3.3 asks how significant was the expatriate community at the destination.

Partner's question 3.4 asks what proportion of social activity takes place with host nationals, and what proportion with other expatriates.

The answers to these questions

appear in Tables 5.48 and 5.49

The data indicate no relationship between the availability of an expatriate community or interaction with that community on the one hand, with assignee expectations of return on the other hand.

Accordingly, the data refute this proposition.

Proposition 27: Self-recognition of learning and development

Proposition 27: Assignees who recognise that the international assignment has been a learning and developmental experience will have more positive work- and career-related expectations of their return to the home organisation

Questions 6.4 (a through e) and question 7.1i ask the returnee about perceived learning and development during the assignment.

The responses to these questions appear in Tables 5.37 and 5.41

Table 5.70: Correlations: Learning and development

Question	Coding	Correlations (Significance 0.01 or better)				
		Expectations				
		Career	Challenge	Development	Money	Long Term
6.4a During the assignment I learned how to work and manage across cultural boundaries	1=Strongly Disagree 2=Disagree 3=Neutral 4=Agree 5=Strongly Agree					
6.4b I enjoyed more autonomy than at home base	ditto		- 0.280			
6.4c I held more responsibility than at my home base	ditto			- 0.286		
6.4d The experience has made me a better manager	ditto					
6.4e The assignment has enhanced my specialist expertise	ditto					
7.1i The expatriate assignment has enhanced my potential usefulness to my employer	ditto					+ 0.585

The data indicate, if anything, that assignees who recognise the assignment to have been a learning or developmental experience have lower expectations of challenge and development at return. However, the relationship coefficients are very low, and in general the data indicate no relationship between self-recognition of development on the one hand, and expectations of return on the other hand. This proposition is refuted.

It is interesting to note, however, that assignees appear to differentiate between learning and development in general, and learning and development that they perceive as being useful to their employer. Assignees who recognise themselves to be more useful to their employer at return than they were at departure have significantly higher expectations of continued long-term career enhancement.

That relationship is shown cross-tabulated below:

		Percentage of participants		
		Enhanced usefulness to employee		
		Disagree	Neutral	Agree
Expectation (Long-Term)	Negative	5.2	3.1	7.3
	Neutral		6.3	12.5
	Positive		3.1	62.5

Proposition 28: Characteristics of the job following return

Proposition 28: International assignees who return to a job that satisfies their requirements for responsibility, autonomy and status will have more positive expectations of the effect of the international assignment upon their long-term career prospects.

Question 7.1 (a, b, d, and f) asks the assignee about the job to which they have returned: its status, suitability, autonomy and responsibility.

Responses to that question appear in Table 5.41

Table 5.71: Correlations: Job Satisfaction

Question	Coding	Correlations (Significance 0.01 or better)
		Expectation (Long Term)
7.1a I am satisfied with the status that my job provides	1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree	+ 0.335
7.1b My job is suitable for my talents and expertise	ditto	+ 0.286
7.1d I am satisfied with the autonomy that my job provides	ditto	
7.1f I am satisfied with the responsibility that my job requires	ditto	+ 0.302

The data tend to support this proposition: assignees who express satisfaction with the job to which they have returned are generally more likely to expect the assignment to continue providing career-enhancement in the long term.

Proposition 29: Utilisation of skill and experience acquired overseas

Proposition 29: International assignees who return to a job which makes use of skill, learning and development acquired during the international assignment will have more positive expectations of the effect of that assignment upon their long-term career prospects.

Question 7.1h asks whether the post-return job uses the experience acquired during the international assignment.

The responses to that question appear in Table 5.41

Table 5.72: Correlations: Ability to utilise experience

Question	Coding	Correlations (Significance 0.01 or better)
		Expectation (Long Term)
7.1h My job allows me to make use of the experience that I acquired in the expatriate assignment	1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree	+ 0.397

The data support this proposition: assignees who perceive themselves able to apply what they learned overseas to the job to which they return tend to have higher expectations that the assignment will continue to provide career enhancement in the long term.

5.5 Relationships between factors affecting expectation

The fourth research question asks:

What relationships exist between factors affecting the expectations of international assignees ?

In order to address that question, factors that have been identified as affecting motivation or expectation are divided into four groups:

- Personal factors (such as the assignee's age) that may affect motivation and expectation throughout the international assignment, from selection through sojourn to return and reestablishment;
- Factors operating at the selection stage of the assignment (such as the subjects that are discussed at the time of selection) that may affect motivation and expectation throughout the assignment;
- Factors that come into play during the overseas sojourn (such as the levels of responsibility or autonomy encountered overseas) that may affect the assignee's expectations immediately prior to return;
- Factors that come into play after the assignee's return to the home base (such as the returnee's evaluation of the post-return job) that may affect the assignee's long term expectations.

Factor analysis is then applied to each group in turn to combine mutually-correlated variables into factors, thereby reducing the independent variable count.

There is a fifth group of factors: the motives that the assignee generates at the time of selection contain interrelationships, as do the expectations that the assignee reports immediately prior to return. In addition, there are relationships between motives at the time of selection and expectations at the time of return, and these in turn have relationships with the assignee's post-return expectation of continued long-term career enhancement.

Table 5.73: Personal Characteristics as factors.

The following personal characteristics of the assignee have been found to affect the assignee's motivations and expectations before, during and after the assignment:

Question	Coding	Correlations (Significance 0.01 or better)									
		Motives					Expectations				
		Career	Challenge	Development	Money	Career	Challenge	Development	Money	Long Term	
1.6a Age of the assignee	Years	- 0.338		- 0.376	+0.389	- 0.341		- 0.326	- 0.291		- 0.542
1.6b Married status	0 = Not Married 1 = Married				+0.382						
1.6c Dependent children	0 = No children 1 = 1 child or more			- 0.316	+0.365			- 0.258	- 0.275		- 0.360
2.2 Tenure with the organisation	Years			- 0.281				- 0.270			- 0.467
2.7 Prior expatriate experience	0 = First assignment 1 = Prior experience	- 0.283			+0.301				- 0.350		- 0.306

Factor analysis is applied to the personal factors affecting motivations or expectations.

Table 5.74: Personal Characteristics: Correlation Matrix

	1	2	3	4
1 Age				
2 Married	+ 0.438			
3 Children	+ 0.750	+ 0.556		
4 Tenure	+ 0.637		+ 0.359	
5 Prior Experience	+ 0.386		+ 0.314	

All correlations are to 0.01 significance level or better.

Table 5.75: Personal Characteristics: Component Matrix

Item	Components	
	1	2
Age	+ 0.908	- 0.042
Children	+ 0.861	- 0.008
Tenure	+ 0.686	- 0.578
Married	+ 0.648	+ 0.147
Prior Experience	+ 0.427	+ 0.817

One common factor emerges, involving Age, Married status, Number of dependent children and Tenure within the organisation. This is not unexpected: older participants have had more opportunity to marry, have children, and accrue tenure within the workplace. This factor (for which the name "**Maturity**" was chosen) was extracted for later use in regression analysis.

The remaining variable, Prior Expatriate Experience, is left unfactorised.

Table 5.76: Factors that come into play at the time of selection

Question	Coding	Correlations (Significance 0.01 or better)									
		Motives					Expectations				
		Career	Challenge	Development	Money	Career	Challenge	Development	Money	Long Term	
2.5 Geographical destination North America	0 = No, 1 = Yes	+ 0.327				+ 0.317	+ 0.320		+ 0.456		
2.6 Planned duration of assignment	Months					- 0.293			- 0.402		
2.8i I believe that my selection shows that my achievements and/or track record were recognised and appreciated by my organisation.	1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree	+ 0.532		+ 0.292		+ 0.382	+ 0.341	+ 0.289	+ 0.382	+ 0.335	
2.10d Selection discussion included the subject of Career Prospects	0 = Not at all 1 = To some Extent 2 = In Depth	+ 0.414		+ 0.278		+ 0.370	+ 0.388	+ 0.351	+ 0.392	+ 0.407	
2.10g Selection discussion included the subject of the job to which I would return.	ditto	+ 0.276					+ 0.274		+ 0.444		
2.10h Selection discussion included the reason that I had been selected for the assignment	ditto	+ 0.274							+ 0.305		

Factor analysis is applied to the factors that come into play at the time of selection:

Table 5.77: Selection Characteristics: Correlation Matrix

	1	2	3	4	5
1 North America					
2 Planned Duration (Years)	- 0.422				
3 Perceive recognition	+ 0.326				
4 Discuss Career	+ 0.333		+ 0.334		
5 Discuss return job	+ 0.517	- 0.364		+ 0.328	
6 Discuss why selected			+ 0.273	+ 0.263	

All correlations are to 0.01 significance level or better.

Table 5.78 Selection Characteristics: Component Matrix

Item	Components	
	1	2
North America	+ 0.802	+ 0.220
Planned Duration (Years)	- 0.786	+ 0.060
Discuss return job	+ 0.697	+ 0.329
Discuss why selected	- 0.060	+ 0.759
Discuss Career	+ 0.202	+ 0.715
Perceive recognition	+ 0.292	+ 0.626

Principal Components Analysis: Rotated Component Matrix
Rotation Method: Varimax with Kaiser Normalisation

Two factors are extracted from these variables.

The first factor, combining assignments of shorter duration, assignments to North America, and assignments in which the job to which the assignee will return is discussed at the point of selection, is named "**Short-Duration Assignment**".

Proposition 23 above indicates that individuals assigned to North American have distinct motivations and expectations, being more likely to be motivated by expectations of career development and less likely to be motivated by expectations of financial reward.

The extraction of this factor appears to indicate that North American assignments may be of comparatively short duration: perhaps the short duration in turn facilitates consideration of the post-return job.

(The contrast between the characteristics of assignments to North America and assignments to Asia was noted above [see page 268]. Similarly, in contrast to the "Short Duration Assignment" to North America, a category of assignees

exists comprising older individuals having prior expatriate experience assigned to Asia for comparatively long durations. This category is named "Old China Hand").

The second factor combines elements of discussion about career, discussion about the reasons for the assignee's selection, and the assignee's belief that selection represents recognition of past achievement. A combination of these three elements appears to indicate that the long-term implications of the assignment for the individual and the individual's career are discussed at the time of selection. This factor is accordingly named "Return Planning at Selection".

Variations in the motivations and expectations of assignees within these categories is shown below:

Percentages of participants within this category → having this characteristic	Short Duration Assignment	Old China Hand
Motive to accept assignment (Career)	93.3	62.5
Motive to accept assignment (Challenge)	93.8	100.0
Motive to accept assignment (Development)	100.0	87.5
Motive to accept assignment (Money)	18.8	87.5
Expectation at return (Career enhancement)	81.3	33.3
Expectation at return (Challenge)	81.3	53.3
Expectation at return (Development)	50.0	38.9
Expectation at return (Money)	31.3	6.7
Long-term expectation of career enhancement	81.3	31.2

Percentages of participants with or without Return Planning at Selection → having this characteristic	No Return Planning	Return Planning
Motive to accept assignment (Career)	62.3	94.3
Motive to accept assignment (Challenge)	98.4	97.1
Motive to accept assignment (Development)	95.1	100.0
Motive to accept assignment (Money)	70.5	45.7
Expectation at return (Career enhancement)	52.5	78.5
Expectation at return (Challenge)	41.0	79.4
Expectation at return (Development)	31.1	52.9
Expectation at return (Money)	11.5	50.0
Long-term expectation of career enhancement	54.1	85.7

Table 5.79: Factors that come into play during the overseas sojourn

Question	Coding	Correlations (Significance 0.01 or better)				
		Expectations				
		Career	Challenge	Development	Money	Long
5.1 During the assignment, how often did you return to your home base for business reasons	0 = Never 1 = Annually 2 = Six-Monthly 3 = Quarterly 5 = Monthly				- 0.360	
6.3 Had a choice about returning at this time	0 = No, 1 = Yes		+ 0.327		+0.288	
6.4b I enjoyed more autonomy than at home base	1=Strongly Disagree 2=Disagree 3=Neutral 4=Agree 5=Strongly Agree		- 0.280			
6.4c I held more responsibility than at home base	ditto			- 0.286		
6.6 Pre-return discussion with home-based department	0 = No, 1 = Yes				+0.304	

Factor analysis is applied to the factors that come into play during the overseas sojourn:

Table 5.80: Sojourn Characteristics: Correlation Matrix

	1	2	3	4
1 Return visit frequency				
2 Choice to return	- 0.295			
3 Autonomy				
4 Responsibility		+ 0.718		
5 Plan return with department				

All correlations are to 0.01 significance level or better.

Table 5.81 Sojourn Characteristics: Component Matrix

Item	Components	
	1	2
Autonomy	+ 0.920	- 0.053
Responsibility	+ 0.917	+ 0.024
Return visit frequency	+ 0.239	- 0.806
Choice to return	+ 0.105	+ 0.674
Plan return with department	+ 0.114	+ 0.518

Principal Components Analysis: Rotated Component Matrix
Rotation Method: Varimax with Kaiser Normalisation

Two factors are extracted from these variables.

The first factor combines exposure to higher-than-usual levels of Autonomy and Responsibility during the assignment. This factor, which appears to represent personal development, is named "**Growth during the assignment**".

The second factor combines the assignee being able to return to the home base at a time of their choosing, infrequent return visits to the home base, and a tendency to include the home-based department in pre-return planning. This factor is named "**Return Planning**".

Variations in the motivations and expectations of assignees within these categories is shown below:

Percentages of participants with or without Growth During the Assignment → having this characteristic	No Growth	Growth
Expectation at return (Career enhancement)	72.2	54.2
Expectation at return (Challenge)	66.7	47.5
Expectation at return (Development)	52.8	30.5
Expectation at return (Money)	27.8	23.7
Long-term expectation of career enhancement	73.0	61.0

Percentages of participants with or without Return Planning prior to return → having this characteristic	No Planning	Planning
Expectation at return (Career enhancement)	54.5	75.9
Expectation at return (Challenge)	48.5	69.0
Expectation at return (Development)	34.8	48.3
Expectation at return (Money)	16.7	44.8
Long-term expectation of career enhancement	59.7	79.3

Table 5.82: Factors that come into play after return

Question	Coding	Correlations (Significance 0.01 or better)
		Expectation (Long Term)
7.1a I am satisfied with the status that my job provides	1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree	+ 0.335
7.1b My job is suitable for my talents and expertise	ditto	+ 0.286
7.1f I am satisfied with the responsibility that my job requires	ditto	+ 0.302
7.1h My job allows me to make use of the experience that I acquired in the expatriate assignment	1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree	+ 0.397
7.2 Post return discussion about Salary and allowances	0 = Not at all 1 = To some extent 2 = In depth	+ 0.422
7.3 Post-return discussion with Line Manager	0 = No, 1 = Yes	+ 0.276
7.1i The expatriate assignment has enhanced my potential usefulness to my employer	1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree	+ 0.585

Factor analysis is applied to the factors that come into play at return:

Table 5.83: Return Characteristics: Correlation Matrix

	1	2	3	4	5	6
1 Satisfied with status						
2 Suitable job	+ 0.618					
3 Satisfied with responsibility	+ 0.631	+ 0.686				
4 Able use experience	+ 0.445	+ 0.512	+ 0.535			
5 Discuss salary		+ 0.302				
6 Discuss with line manager	+ 0.279			+ 0.268	+ 0.279	
7 Enhanced usefulness				+ 0.277		+ 0.298

All correlations are to 0.01 significance level or better.

Table 5.84 Return Characteristics: Component Matrix

Item	Components	
	1	2
Satisfied with responsibility	+ 0.886	+ 0.030
Suitable job	+ 0.848	+ 0.168
Satisfied with status	+ 0.814	+ 0.123
Able use experience	+ 0.686	+ 0.271
Enhanced usefulness	+ 0.050	+ 0.739
Discuss with line manager	+ 0.185	+ 0.717
Discuss salary	+ 0.127	+ 0.639

Principal Components Analysis: Rotated Component Matrix
Rotation Method: Varimax with Kaiser Normalisation

Two factors are extracted from these variables.

The first factor combines Satisfaction with the Status and Responsibility of the post-return job, a match between the job and the assignee's talents and experience, and the ability to utilise the experience gained overseas. This factor is named "**Job Satisfaction**".

The second factor combines the assignee's assessment that the assignment has increased their utility to their employing organisation, a tendency to discuss the assignee's post-return salary and allowances, and a tendency to include the departmental line manager in post-return discussion. This factor is named "**Line Manager Involvement**".

Variations in the motivations and expectations of assignees within these categories is shown below:

Percentages of participants with or without Job Satisfaction after return → having this characteristic	No Job Satisfaction	Job Satisfaction
Long-term expectation of career enhancement	58.3	87.5

Percentages of participants with or without Line Manager Involvement during return having this characteristic	No Line Manager Involvement	Line Manager Involvement
Long-term expectation of career enhancement	46.2	78.9

Table 5.85: Relationships between Motives and Expectations

	Correlations (Significance 0.01 or better)											
	Motives						Expectations					
	Career	Challenge	Development	Money	Career	Challenge	Development	Money	Long Term			
Motive (Challenge)												
Motive (Development)	+ 0.489	+ 0.367										
Motive (Money)												
Expectation (Career)	+ 0.369			- 0.341								
Expectation (Challenge)					+ 0.639							
Expectation (Development)					+ 0.597	+ 0.513						
Expectation (Money)	+ 0.314			- 0.353	+ 0.476	+ 0.506						
Expectation (Long-Term)	+ 0.454		+ 0.449		+ 0.396	+ 0.276	+ 0.315					

Factor analysis has been applied to variables that correlate with at least one independent variable representing motivation or expectation. The factor count has thereby been reduced considerably.

In addition, it has been noted that mutual relationships exist between motives and expectations.

An international assignment proceeds in a temporal fashion, selection preceding sojourn, followed by return. Characteristics of the selection may affect the sojourn, but the converse is clearly not possible.

Accordingly, based upon the foregoing analysis, assignee **Motivation** at the time of selection may be affected by the following:

- | | | |
|--------------------------------|--|-----------------|
| • Maturity | | Characteristics |
| • Prior Expatriate Experience | | of |
| • Short Duration Assignment | | the |
| • Return Planning at Selection | | selection |

Similarly, assignee **Expectation** at the time of return may be affected by the following:

- | | | |
|--------------------------------|--|-----------------|
| • Maturity | | Characteristics |
| • Prior Expatriate Experience | | of |
| • Short Duration Assignment | | the |
| • Return Planning at Selection | | selection |

-
- | | | |
|----------------------------|--|---------------|
| • Motivation (Career) | | Motives |
| • Motivation (Challenge) | | for accepting |
| • Motivation (Development) | | the |
| • Motivation (Money) | | assignment |

-
- | | | |
|--------------------------------|--|--------------------|
| • Growth during the assignment | | Characteristics of |
| • Return Planning | | the sojourn |

Finally, the assignee's **Long-Term Expectation** of career enhancement following return to and reestablishment in the home base organisation may be affected by what has gone before, viz.:

• Maturity		Characteristics
• Prior Expatriate Experience		of
• Short Duration Assignment		the
• Return Planning at Selection		selection

• Motivation (Career)		Motives
• Motivation (Challenge)		for accepting
• Motivation (Development)		the
• Motivation (Money)		assignment

• Growth during the assignment		Characteristics of
• Return Planning		the sojourn

• Expectation (Career)		Expectations
• Expectation (Challenge)		prior
• Expectation (Development)		to
• Expectation (Money)		return

• Job Satisfaction		Characteristics of
• Line Manager Involvement		Return/Reestablishment

Multiple Regression is now applied to those relationships in order to determine their relative importance.

In all cases, Multiple Regression is by stepwise refinement. At each step, one variable is added to or removed from the regression equation, the process continuing until no further significant improvement can be made.

Table 5.86 Multiple Regression of Motivation (Career)

Model	Predictor	Beta	Significance	R	R Square
1	Return Planning at Selection	+ 0.497	0.000 **	0.497	0.247
2	Return Planning at Selection	+ 0.497	0.001 **	0.567	0.321
	Short Duration Assignment	+ 0.273	0.000 **		

Table 5.87 Multiple Regression of Motivation (Development)

Model	Predictor	Beta	Significance	R	R Square
1	Maturity	-0.274	0.007 **	0.274	0.075
2	Maturity	-0.243	0.015 *	0.346	0.120
	Return Planning at Selection	+ 0.214	0.032 *		

Table 5.88 Multiple Regression of Motivation (Money)

Model	Predictor	Beta	Significance	R	R Square
1	Maturity	+ 0.420	0.000 **	0.420	0.176
2	Maturity	+ 0.297	0.006 **	0.474	0.225
	Short Duration Assignment	- 0.253	0.018 *		

Table 5.89 Multiple Regression of Expectation (Career)

Model	Predictor	Beta	Significance	R	R Square
1	Motivation (Career)	+ 0.369	0.000 **	0.369	0.136
2	Motivation (Career)	+ 0.385	0.000 **	0.514	0.264
	Motivation (Money)	- 0.358	0.000 **		

Table 5.90 Multiple Regression of Expectation (Development)

Model	Predictor	Beta	Significance	R	R Square
1	Maturity	-0.341	0.001 **	0.341	0.117
2	Maturity	-0.306	0.002 **	0.420	0.176
	Return Planning at Selection	+ 0.247	0.011 *		

Table 5.91 Multiple Regression of Expectation (Challenge)

Model	Predictor	Beta	Significance	R	R Square
1	Return Planning at Selection	+ 0.333	0.001 **	0.333	0.111
2	Return Planning at Selection	+ 0.333	0.001 **	0.422	0.178
	Short-Duration Assignment	+ 0.259	0.007 **		

Table 5.92 Multiple Regression of Expectation (Money)

Model	Predictor	Beta	Significance	R	R Square
1	Short Duration Assignment	+ 0.457	0.000 **	0.457	0.209
2	Short Duration Assignment	+ 0.457	0.000 **	0.607	0.368
	Return Planning at Selection	+ 0.399	0.000 **		

Table 5.93 Multiple Regression of Expectation (Long Term)

Model	Predictor	Beta	Significance	R	R Square
1	Active Line Management	+ 0.566	0.000 **	0.566	0.321
2	Active Line Management	+ 0.470	0.000 **	0.657	0.431
	Maturity	-0.346	0.000 **		
3	Active Line Management	+ 0.483	0.000 **	0.697	0.486
	Maturity	-0.299	0.000 **		
	Job Satisfaction	+ 0.2390	0.002 **		
4	Active Line Management	+ 0.408	0.000 **	0.722	0.522
	Maturity	-0.271	0.001 **		
	Job Satisfaction	+ 0.229	0.003 **		
	Motivation (Career)	+ 0.209	0.011 *		

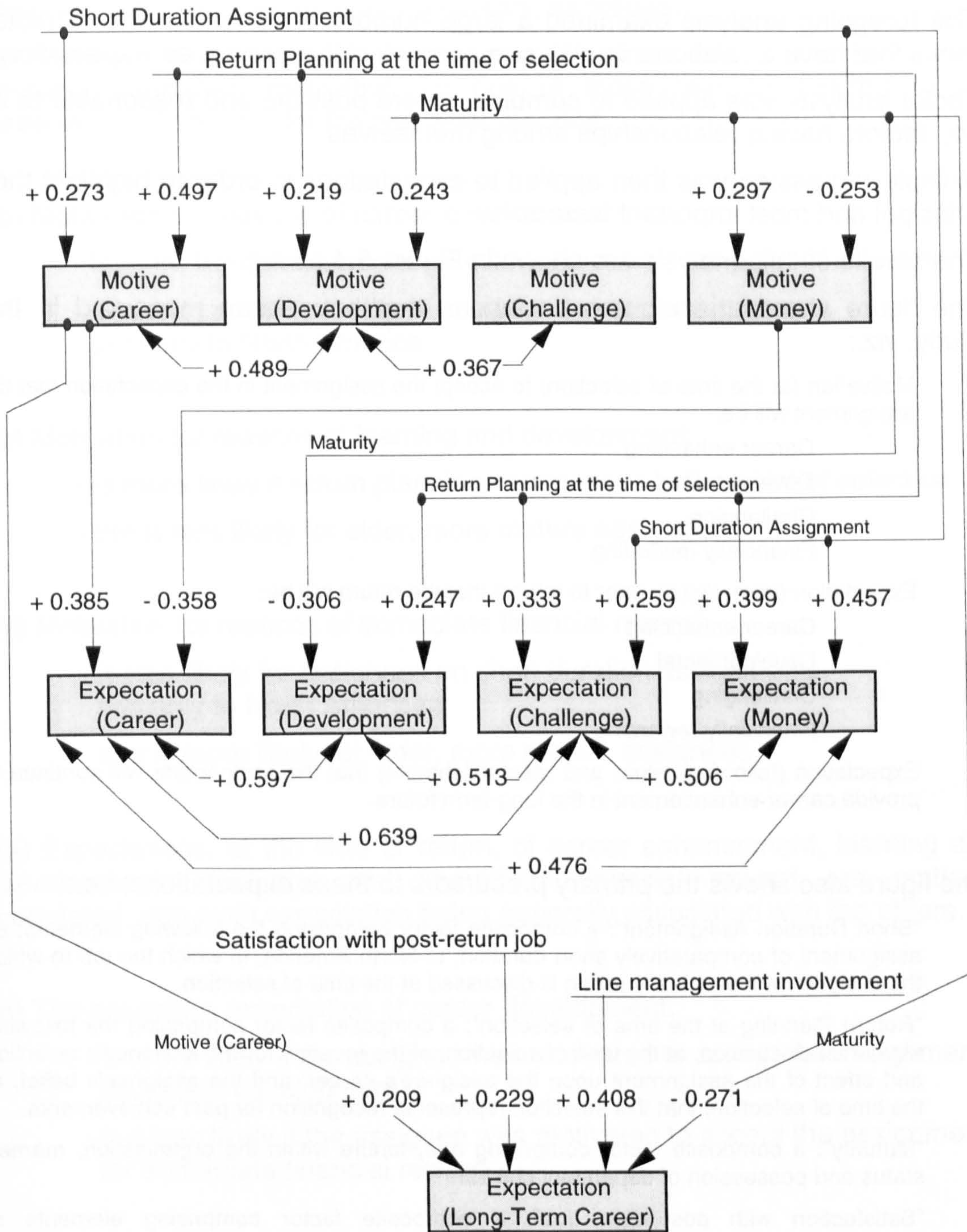
The results of multiple regression are summarised here:

Table 5.94 Summary of Multiple Regression

Predictor	Dependent Variable (Expectation)	Standardised Regression Coefficient (Beta)
Return Planning at Selection	Motivation (Career)	+ 0.497
Short-Duration Assignment		+ 0.273
Maturity	Motivation (Development)	- 0.243
Return Planning at Selection		+ 0.214
(None)	Motivation (Challenge)	-
Maturity	Motivation (Money)	+ 0.297
Short Duration Assignment		- 0.253
Motivation (Career)	Expectation (Career)	+ 0.385
Motivation (Money)		- 0.358
Maturity	Expectation (Development)	- 0.306
Return Planning at Selection		+ 0.247
Return Planning at Selection	Expectation (Challenge)	+ 0.333
Short Duration Assignment		+ 0.259
Short Duration Assignment	Expectation (Money)	+ 0.457
Return Planning at Selection		+ 0.399
Active Line Management	Expectation (Long Term)	+ 0.408
Maturity		- 0.271
Job Satisfaction		+ 0.229
Motivation (Career)		+ 0.209

These results are summarised graphically below:

Figure 5.4: Results of multiple regression: Primary precursors to expectations



The foregoing analysis examined a large number of variables and extracted those that have a relationship with one or more of the assignees' expectations.

Factor analysis was applied to combine, where possible and reasonable to do so, factors having relationships among themselves.

Multiple regression was then applied to expectations in order to highlight their principal and most important factors.

The results of this analysis are shown in Figure 5.4 above.

The figure shows the eight expectations that have been measured in this study, viz.:

Motivation (at the time of selection) to accept the assignment in the expectation that the assignment will be:

- Career enhancing
- Developmental
- Challenging
- Financially rewarding

Expectation (immediately prior to return) that the return will be:

- Career enhancing
- Developmental
- Challenging
- Financially rewarding

Expectation (following return and reestablishment) that the assignment will continue to provide career enhancement in the long-term future.

The figure also shows the primary precursors to these expectations, i.e.:

"Short Duration Assignment": a composite factor comprising the following elements: an assignment of comparatively short duration, to North America, in which the job to which the assignee will eventually return is discussed at the time of selection.

"Return Planning at the time of selection": a composite factor comprising the following elements: discussion, at the time of selection, of the reasons for the assignee's selection and effect of the assignment upon the assignee's career; and the assignee's belief, at the time of selection, that this selection represents recognition for past achievements.

"Maturity": a composite factor comprising age, tenure within the organisation, married status and possession of dependent children.

"Satisfaction with post-return job": a composite factor comprising elements of satisfaction with the status and responsibility offered by the post-return job, a match between the job and the assignee's talents and experience, and the ability to utilise the skill and experience acquired overseas in that job.

"Line management involvement": a composite factor comprising the involvement of the assignee's post-return line manager in post-return discussion and debriefing; the assignee's assessment that the assignment has enhanced long-term usefulness to the employing organisation, and the post-return discussion about salary and allowances.

The figure shows the expectations (and the correlations between expectations), with their primary precursors, as follows:

(a) Motivations for reasons of career, development and challenge are all mutually correlated, motivation for one of these reasons tending to be associated with motive for the two other reasons.

(b) Motivation for reasons of career development:

- is more likely if return planning commences at the point of selection
- and is more likely for those on short duration assignments, primarily to North America.

(c) Motivation for reasons of learning and development:

- is more likely if return planning commences at the point of selection
- but is less likely for older, more mature assignees.

(d) Motivation for reasons of immediate financial reward:

- is less likely for assignees on short duration assignments, primarily to North American
- and is more likely for older, more mature assignees.

(e) Expectations, at the time of return, of career enhancement, learning and development, challenge and immediate financial reward are mutually correlated, one such expectation being generally associated with the others.

(f) The pre-return expectation of career development:

- is more likely if the assignee was motivated to accept the assignment for career development
- but less likely if the assignee was motivated to accept the assignment for immediate financial reward.

(g) The pre-return expectation of learning and development:

- is more likely if career planning commenced at the point of selection
- but less likely in older, more mature assignees.

(h) The pre-return expectation of challenge:

- is more likely if career planning commenced at the point of selection
- and more likely for those on short duration assignments, primarily to North America.

(i) The pre-return expectation of immediate financial reward:

- is more likely if career planning commenced at the point of selection
- and is more likely for those on short duration assignments, primarily to North America.

(j) The post-return expectation that the assignment will yield career enhancement in the long term:

- is more likely if the assignee was motivated to accept the assignment for career development
- and more likely if line-management was involved in post-return discussion and debriefing
- and more likely if the assignee is satisfied with the post-return job
- but less likely in older, more mature assignees.

These findings are discussed in Chapter 6 below.

Chapter Six

Conclusions

Chapter Six Conclusions

6.1 Discussion and Conclusions

Motivation to accept the assignment

The overwhelming majority of the international assignees who took part in this survey were motivated to accept the assignment by the prospect of challenge or excitement, and by the prospect of learning and development. Three-quarters were motivated by prospects of career enhancement, and that is entirely consistent with the twenty percent whose motives were purely personal

This implies that each individual defined "challenge" and "development" in their own terms. For some, they may indeed mean challenging work, and work- and career-related development. Others, however, seem to mean the challenge that comes from living and working in, and adapting to, a foreign country: and the personal development, in the broadest sense, that accrues from that experience.

As the participants in this survey had all "self-selected" themselves by accepting an international assignment we may conclude that "challenge" and "development" are important motivators for British international assignees. These motivators are at peak of Maslow's need hierarchy and clear motivating factors in terms of Herzberg's motivation-hygiene theory.

Less than two-thirds of assignees were motivated to accept the assignment by the prospect of immediate financial reward. Indeed, there is a clear trade-off between the long-term prospect of career enhancement and the more immediate prospect of money. At the same time, assignees are more likely to be motivated by long-term career enhancement if they and their organisation discuss the long-term implications of the assignment at the time of selection.

Moreover, the likelihood that an assignee will be motivated by long-term career enhancement rather than short-term financial reward depends considerably upon the individual's age, and the regional destination. This is entirely in accordance with the literature, which indicates that some destinations offer better opportunities for development while providing higher levels of corporate visibility and status, and implies that individuals at differing career stages will exhibit differing motivations and expectations.

There is a category of young employees who, after discussing the job to which they will eventually return, are assigned to North America for a comparatively short period. This group is particularly likely to be motivated by long-term career enhancement, and particularly unlikely to be motivated by money.

By way of contrast, another category of assignee - "Old China Hands" - comprises older individuals having prior experience of repatriation,

comparatively longer tenure with their organisation, assigned to Asia for comparatively long periods. This group is particularly likely to be motivated by immediate financial reward, and less likely to be motivated by longer-term prospects. This may reflect their career having reached a ceiling or plateau in their home-based organisation.

It seems, therefore, that different categories of assignee have different expectations based upon different needs and wants. This point will be addressed later in this discussion.

Expatriates: Active or Passive ?

The literature on expatriation sometimes gives the impression that international assignees are somewhat passive: as if, sent overseas to meet the obligations of their employer, they are motivated by the unrealistically high expectations that arise from misjudging the purpose of their assignment and their importance to the organisation.

The data captured by this study, however, indicates precisely the opposite: assignees appear to take an active part in accepting international assignments, and appear to be motivated by quite rational expectations.

One explanation may be that this study excluded "career expatriates" from its sample population. The early literature on repatriation and its problems arose in part when expatriate cadres were repatriated, often against their will, into a shrinking headquarters. Such expatriates play no part in this study.

Another possible explanation is that this study has asked the individual assignees themselves about their motives and expectations, rather than asking human resource managers to describe them. Given that expectations and motivations are internalised within the individual, the approach taken by this study would seem more likely to yield accurate results.

It may be recalled, also, that this study deliberately excluded individuals who had joined the organisation immediately prior to their international assignment. Because the assignees in this study were all recruited internally within their organisations, it would seem reasonable to assume that they would be reasonably familiar with their organisation and its attitude to internationalisation even in the absence of face-to-face discussion about the subject. Thus, although direct discussion about the long-term personal implications of the assignment was not a necessary precursor to long-term career-related motivation, when such discussion took place it served only to increase the likelihood of such motivation.

It seems probable, then, that organisations envisaging long-term personal development to accrue from the assignment would tend to discuss the subject with the assignee: on the other hand, if the primary purpose of the assignment was simply to get a job done then, presumably, the subject would not be raised. Simultaneously, assignees seem just as able to infer meaning from the absence of discussion as from active discussion. There is little evidence here

that expectations are "unrealistic", even for those who form expectations in the absence of discussion.

There is further evidence to dispel the image of passive assignment. Most assignees were pleased to be selected. More than half the assignees actively sought the assignment, only 18.7% being surprised at their selection. More than half worked for organisations where expatriate assignments were a normal practice, and nearly half joined the organisation because they wanted to travel.

The overall picture built up from these findings tends to dispel the image of passive, misled assignees. On the contrary, they appear to be using the organisation for their own ends just as much as the organisation is using them: they seem to be aware of the short-term and long-term benefits that will accrue from the assignment, and they appear to be aware enough about their organisation and their place within it to be motivated by rational consideration of fact. Many of the individuals who took part in this study appear to be managing their own careers competently.

As recently as 1999, Black and Gregersen wrote "*it is critical that expats themselves know the rationale for their assignments*", and gave the example of one individual who, "*knowing the main purpose of his posting ... did not build up unrealistic expectations that he would be promoted after returning home*". The data captured in *this* study, however, would appear to indicate that British international assignees build up reasonably accurate expectations, perhaps basing those expectations both upon what is said and upon what goes unremarked.

That Tung's (1997) study of over 400 North American international assignees should find that "*the two top reasons for seeking and/or accepting an international assignment are financial rewards and career advancement*" appears to reinforce the impression that British and North American experiences differ.

On the other hand, Tung's (1998) finding that increasing numbers of individuals seek out an international assignment in order to acquire skills and experience to enhance their "internal" career (see page 103) may indicate that the British and North American experiences are being forced to converge by modern trends in international business.

Expectations at the time of return

Although 74% of assignees were motivated to accept the international assignment by prospects of long-term career enhancement, only 61% expect career enhancement when they are about to return to their home base.

The findings indicate that the trade-off between the long-term career motivation and short-term financial motivation that was evident at the time of selection continues to be influential at the time of return. Individuals who were motivated to accept the assignment by prospects of long-term career

enhancement are more likely to expect career enhancement when they return. Assignees who were motivated to accept the assignment by prospects of short-term financial reward are less likely to expect career enhancement when they return.

One possible explanation for the difference between these two figures arises from a consideration of the contrasting classes of assignee taking part in this study. Younger assignees on comparatively short assignments (and especially those assigned to North America) seem particularly prone to be motivated by long-term career enhancement: there is no evidence to consider them misled or mistaken, so it is to be expected that they should continue to expect career enhancement at the time of their return.

On the other hand, older, more mature assignees on longer assignments (and especially those assigned to Asia) are more likely to be motivated by short-term prospects of immediate financial reward. Perhaps the apparent discrepancy (74% motivated by prospects of career enhancement at the time of selection dwindling to 61% expecting career enhancement at the time of return) is simply a measurement and nomenclature problem within this study. Perhaps "Old China Hands" see their comparatively longer assignments as immediate career enhancement: enhancement that disappears when they return.

In this connection, it is interesting to note that North American expatriates are often reported to have "more than 12 years of experience" with their companies (Adler 1981; Harvey 1989; Black and Gregersen 1991b). In this study the mean tenure for all respondents was 7.3 years (see page 234), and only one fifth of the respondents had been with their organisation for 10 years or more. This difference in demographics may go some way to explaining discrepancies and differences between the North American and British experiences.

Turning now to the pre-return expectations of challenge, of development, and of financial reward. There is nothing in the findings to indicate that any of these expectations arises from or is influenced by the overseas sojourn itself. It seems to make little difference how long the assignment lasts (or whether the assignment is actually longer or shorter than planned), how much (or how little) communication takes place between assignee and home-base, whether the assignee's performance is appraised or not, how much (or how little) the individual learns and grows, or how much (or how little) planning precedes the eventual return.

On the contrary, the expectations of challenge, of development and of financial reward appear to be influenced by precisely those variables that influenced the original motivation to accept the assignment: the age of the assignee, the nature of the assignment, and return planning that commenced at the time of selection.

Younger individuals on shorter assignments (and especially those in North America) are more likely to expect the return to be financially rewarding, and

more so again if the implications of the return are discussed at the time of selection. This is consistent with what has gone before: this group were originally motivated to sacrifice immediate short-term financial reward for longer-term career enhancement, and now that sacrifice is about to be paid off.

Similarly, assignees who began return planning at the time of selection are more likely to expect the return to be developmental and challenging. Older assignees, who were originally more likely to be motivated by immediate financial reward, are now less likely to expect development: their reward is over.

These findings are consistent with rational motivations based upon knowledge and experience reached at the time of selection forming in turn rational expectations at the time of return.

Consider, also, how the expectations of challenge, development and financial reward from the assignment itself (97.9%, 96.9% and 61.5%) contrast with the expectations of challenge, development and financial reward from the return to the home base (54.7%, 39%, 25.3%). The instinctive reaction might be to question how this "fall" in expectation arises, but that is illogical. In fact, the expectations of the assignment and the expectations of the return are two quite different things.

Recall that the individuals who took part in this study were recruited internally within their organisation: they are returning to an organisation that they already know. Presumably a return to the status quo ante would not be considered especially challenging or developmental or financially rewarding, so more positive expectations probably indicate an expectation of return to something "better".

Indeed, that expectation of returning to something "better" than before does appear to be engendered at the time of selection. At the time of selection, 59% discuss their career prospects with their employer, and at return 54% expect challenge. At the time of selection, 31% discuss the job that they will have at return, and at the time of return 39% expect the return to be developmental. Only 25% expect the return to be financially rewarding, but this is very close to the number of young individuals sent on shorter assignments predominantly to North America.

These findings indicate, therefore, that expectations are effectively created at the time of selection, before the individual departs for the assignment. They appear to be rational, and there is no indication that they are "unreasonable" or that assignees have been misled: to the contrary, they appear to be based sensibly upon experience and upon discussion between individual and organisation.

This picture is quite different from that frequently painted by the literature: of unskilled individuals dragged unwillingly and problematically back into their headquarters. It may be time, at least in the British context, to divorce the problems once faced by repatriated expatriate cadres from the reality of

current expatriation practice, and to relegate the associated literature to history.

The findings in this study, then, mirror the observations of Inkson et al (1994):

"... one is struck by the total, rather demeaning, powerlessness attributed to the expatriate/repatriate in the process [of expatriation]. The causes of success or failure of [an] expatriate assignment are attributed solely to the company, and the remedies for failure are apparently in the company's hands alone. The expatriate or repatriate is apparently at the mercy of superior corporate forces of HRM, which may be seen as intensive, rational, and therefore benign, or alternatively loose, ad hoc and therefore malign. The proactive role of the expatriate/repatriate in controlling her or his own life and in building company and cross-company expertise goes largely unacknowledged in the expatriate assignment literature".

The findings also indicate, of course, that expectations are neither created during nor much affected by the assignment itself. The literature's traditional suggestions that assignees are unduly influenced by the "expatriate lifestyle" and by "being a big fish in a small pond" appear unjustified. This may be, in part, because international assignments are increasingly to developed, Western nations rather than to developing countries and colonial outposts.

There are recommendations in the literature that organisations should remain in two-way communication with the individual in order to become aware of and influence the otherwise "unreasonable" expectations, but the findings here appear to indicate that this is not necessary: expectations are rational, and do not require correction in this way, and are not apparently much influenced by such communication anyway.

The literature also suggests that organisations should allocate several months to planning and co-ordinating the return, taking the opportunity to recognise and modify the individual's expectations at that time. Planning and co-ordination are seldom wasted in any enterprise, but the findings here indicate that by this point in the assignee's expectations have been set and will remain comparatively steady regardless of what the organisation says or does.

This is consistent with the finding that training and preparation for the assignment do not significantly affect individuals' motives for accepting the assignment nor significantly affect their expectations at return. Training and preparation are reputed to enhance the assignee's overseas performance and achievement, and this study proposed that that would in turn lead to more positive expectations of return. This study does not attempt to indicate whether organisational action or inaction enhances performance and achievement. The findings here do, however, indicate that organisational actions reputed to modify performance do not appear to modify expectations.

This study used Porter and Lawler's model as an aid to considering the role of organisational action and other variables in determining pre-return expectation.

In their model, performance and achievement leads to positive expectations of reward. This study thereby constructed a number of propositions to the effect that organisational action or characteristics of the assignment likely to enhance performance and achievement during the assignment would be associated with higher levels of pre-return expectation. This study shows this not to be the case.

It may be inappropriate to fit expatriation and repatriation into Porter and Lawler's model in that way, despite the insights produced by attempting to do so. It may be that Porter and Lawler's model is inappropriate in situations where continuous feedback, shown clearly in their model, is unavailable. The literature emphasises the frequent "out of sight, out of mind" nature of an international assignment, and the resulting step-phase nature of the process is quite different from that of a normal work environment allowing continuous feedback.

Continuing long-term expectations

Following the return to the home base, after the assignee has been re-established within the home-based organisation, 65.6% of the individuals in this study continued to expect the assignment to provide long-term career enhancement in the future. That this is not significantly different from the proportion expecting career-enhancement at the time of return (61%) seems further evidence that expectations, far from being "unreasonable", are rational and accurate. As is the case throughout the assignment, those originally motivated to accept the assignment for career-related reasons are more likely to expect long-term career enhancement now, while older individuals are less likely to exhibit this expectation.

Once again, positive organisational action appears to enhance this expectation. Individuals whose job matches their talents, whose job allows them to use the skills and experience acquired overseas and provides them with satisfactory levels of status and responsibility, are more likely to expect long-term future career enhancement. So, too, are those individuals whose line manager was involved in their post-return debriefing and assignment. This, too, seems rational and consistent: assignees returning with long-term expectations would be expected to have those expectations confirmed and enhanced by positive, welcoming organisational action serving to substantiate their value to the organisation and to others.

That apart, however, it may be noted that an individual's predilection to expect long-term career enhancement is not significantly modified by what has gone before. It seems to make little difference how much (or how little) the individual actually learned or achieved during the assignment, or whether any gain in specialist expertise actually occurred. It may be that individuals realise international experience "looks good on the CV" (a term sometimes bandied about almost cynically), and that its simple presence or absence may be more

important than the detail of what exactly occurred. This may be just one more indication that individuals generate accurate expectations based upon reality.

Different expectations for different assignees

Several authors have suggested that different categories of assignee will have different types of levels of expectation, and this suggestion is supported by the data in this study.

Oddou (1991) suggested three categories of expatriate: the *high potential*, the *interested and available*, and the *technical expert* (see page 54). No attempt was made in this study to capture data that could separate respondents into these categories. It might be surmised, however, that assignees on "Short Duration Assignments" correspond approximately to Oddou's *high potentials*, and that "Old China Hands" correspond approximately to Oddou's *interested and available*s. Respondents who considered themselves to be *technical experts* had the opportunity to say so when answering question 2.1

It is not difficult to show that the participants in this study, when categorised in this way, demonstrate different levels of expectation, viz.:

	Category		
	Short Duration Assignment	Technical Expert	Old China Hand
Motivated to accept the assignment by expectations of career development	93.8%	65.0%	62.5%
Expected career development at the time of return from the assignment	81.3%	50.0%	33.3%
Following return, expect the assignment to provide long-term career enhancement	81.3%	55.0%	31.3%

Similarly, Marshall and Cooper (1979) suggested that different motivations would apply at different points throughout an individual's career (see page 58).

Although this study did not attempt to measure or categorise career progress, it is generally understood that age and career stage are related. There is no difficulty in demonstrating that different-aged participants in this study had different expectations:

	Age		
	20 - 29	30 - 39	40+
Motivated to accept the assignment by expectations of career development	78.0%	76.5%	65.0%
Expected career development at the time of return from the assignment	70.7%	66.7%	35.0%
Following return, expect the assignment to provide long-term career enhancement	85.4%	67.6%	66.3%

This study therefore provides general support for the contention that different categories of international assignee will have different levels of expectation. This is inherent in the discussion that has gone before: that assignees appear to make generally accurate expectations based upon their knowledge or experience.

This finding tends to refute Peltonen's (1997) suggestion (see page 54) that expectations of expatriation are homogenised by myth, self-delusion and misleading selection interviews.

6.2 Contribution of the Research

The repatriation literature reports a frequent complaint by Human Resource Managers that they have difficulty in repatriating and reintegrating employees from international assignments who bring with them "unreasonable" expectations.

A number of researchers have investigated the accuracy of work- and career-related expectations as precursors to work adjustment following return from an international assignment.

Nevertheless, there has been little research to determine what work- and career-related expectations are formed by international assignees, to determine when those expectations are formed, or to determine the precursors of those expectations.

This study goes some way to filling that gap, contributing to our knowledge about the work- and career-related expectations of British international assignees, by:

- indicating that British international assignees generally form work- and career-related expectations of expatriation at the time of selection, rather than during the overseas assignment itself;
- indicating that expectations, once formed, remain relatively stable during the overseas assignment.
- identifying a number of precursors to expectations, including personal characteristics of the assignee, and actions (or inactions) by the organisation.
- identifying a number of variables that do not appear to be precursors to expectations;
- identifying a number of assignee groupings that exhibit particular patterns of expectations.

At the same time, however, a number of questions arise from these findings that might benefit from further research:

- When employees selected for international assignments report that they expect the assignment to be challenging, do they expect the challenge to come to their technical skills, to their management skills, to their cultural adaptability, to something else, or to some combination of these?
- When assignees report expectation of development, do they expect to develop their technical expertise, their intercultural skills, their management skills, some general broadening of outlook, or a combination of these?

- Do assignees equate challenge with development and, if so, in what way?
- If assignees' expectations of challenge and development prove to be multifaceted, do different facets of expectation of challenge and development associate with different facets of expectation of career?

The study has investigated the motives and expectations of international assignees across the entire duration of assignment, from selection through overseas sojourn to return, reestablishment with the home-based organisation and beyond. The study has focused upon and captured empirical data from the international assignees themselves rather than from their employing organisations.

The study has been based upon the existing literature covering all phases of the expatriate assignment from selection through sojourn, return and reestablishment.

In so doing, the study has indicated the levels and frequencies of motivations and expectations experienced by British international assignees, and has indicated the main precursors and factors associated with those motivations and expectations. At the same time, a number of variables have been shown to have little or no association with motivation or expectation.

These findings should assist future researchers in theory building, allowing further research into international assignees, their motivations and expectations to be placed upon a more theoretical footing.

The study paints a more optimistic picture of international assignees in general and their expectations in particular than is often depicted in earlier literature. The study concludes that the expectations of British international assignees are generally rational and reasonable, and presents the return and reestablishment of international assignees as a natural ending to an overseas assignment rather than a problematical conflict with their organisation.

6.3 Limitations of the Research

There are a number of limitations to this study that should be noted.

1. The data were obtained from 96 international assignees and 54 partners. This is probably about the smallest data set upon which reliable statistical analysis could have been carried out.

The data set does, however, have the advantage of homogeneity; it is comprised of British assignees who, following internal recruitment by their employing organisation, undertook and returned from an international assignment, and were reintegrated into the employing organisation. The data set is therefore not polluted by a number of other classes of "expatriate" or "assignee" as it excludes: non-British individuals; those affiliated to religious or aid-providing organisations; those recruited from outside the employing organisation; those who decided to remain abroad; those who resigned from the organisation before return; and those who retired immediately following return.

This homogeneity, therefore, allows the data set to "work harder" than might have been the case for a larger data set gathered from a more diffuse population. Nevertheless, researchers should note the size of the data set and treat the resulting findings accordingly.

2. The sample included only British assignees. The results from these findings may not be generalisable to assignees returning to other home countries. Further studies need to examine work- and career-related expectations (and their precursors) from the perspectives of assignees returning home to other countries.

3. This study was cross-sectional in design. It required participants to retrospectively recall a considerable number of facts, perceptions and expectations relating to an assignment with a duration usually measured in years. Future research needs to assess expectations and their precursors on a longitudinal basis, in order to provide more reliable data from which to extract causal relationships.

4. Data was gathered from individuals by questionnaire, which raises the possibility of common method variance problems. When data about both dependent and independent variables are collected through self-reports, there is always the possibility that participants will create or inflate relationships between independent and dependent variables in order to satisfy a need to provide logically consistent answers.

Two factors mitigate against this possibility. Firstly, the questionnaire was deliberately designed to obscure the focus of the survey: no special attention was drawn to expectation, and dependent and independent measurements were frequently combined within the same set of questions (Questions 2.8a through 2.8j, for example, combine 4 dependent and 6 independent variables). Secondly, the assignee's questionnaire ran to 26 pages, lessening the

likelihood that participants would recall the answers to earlier questions and, indeed, increasing the probability that participants nearing the end of the questionnaire would simply want to get it done.

Nevertheless, the possibility remains. Future studies might overcome this possibility by incorporating longitudinal designs, or by designing independent or objective ratings where appropriate.

5. This study gathered data exclusively from international assignees, not from their employing organisations.

The literature indicates that there is frequently a mismatch between the organisation's rationale for an international assignment and the individual's work- and career-related expectations of that assignment. This study, too, implies such a mismatch. As long as data is captured from just one of the two parties, however, such apparent mismatches or misunderstandings must continue to be no more than implied.

In order to demonstrate such mismatches conclusively, however, future research could collect information simultaneously from both the international assignee and the employing organisation.

6.4 Implications of the Research

Implications for Companies employing international assignees

Some British companies that use international assignees may want to be aware that, in the absence of information to the contrary, employees may expect an international assignment to be developmental and career-enhancing; that such development is likely to take place; and that individuals returning from assignment will be aware of their own growth and development.

Such expectations are likely to be formed at the time that the individual is selected for the assignment and, once formed, may remain relatively unchanged until the individual eventually returns to the home base. Companies wishing to avoid problems associated with the repatriation of employees having "unreasonable" expectations might wish to consider monitoring and, if necessary, correcting such expectations during the process of selecting an assignee for the assignment. However, it seems likely that many individuals recognise international experience to have commercial worth, and may nevertheless consider its acquisition to be career-enhancing (but within a different, and perhaps competing organisation).

Companies should also be aware that many returned international assignees continue to expect the assignment to provide long-term career enhancement, almost regardless of what befalls them during their reestablishment into the home base organisation. It may be the case that returnees whose expectations of long-term career enhancement are not met, may sooner or later seek employment elsewhere.

Finally, this study indicates that involving the returning international assignee's line manager in the management and execution of that return appears to provide mutual benefits both to the returnee and to the organisation.

Implications for employees

Employees considering accepting an international assignment within their employing organisation should pay particular attention to the developmental and career-enhancement opportunities that the assignment represents. When those opportunities have not been conveyed to them and discussed with them by their employing company, they may be illusory, or at least may not come to fruition without eventually changing employers. As a consequence, if the organisation fails to describe the developmental and career-enhancing potential of the international assignment, and fails to indicate that consideration has been given to the eventual return to the home base, the individual employee would be advised to initiate such discussion, or at least to note the absence of such discussion, before accepting or rejecting the assignment.

Implications for researchers

This research has provided some confirming evidence for aspects of international assignments that are more usually treated anecdotally in the literature. In particular, this research indicates that international assignees have a tendency to form positive expectations of development and career-enhancement from international assignment and, while employer/employee discussion is a major precursor to expectation, many employees form positive work-related and career-related expectations even in the absence of such discussion.

This research has not identified the sources of such unprompted expectation. The literature occasionally implies that such expectations arise from the envy of friend and colleagues, or by individuals mistakenly confusing corporate and individual aims, or by misunderstanding his or her own career dynamics. Nevertheless, considerably more research is required to provide a fuller explanation for the formation of expectation by international assignees.

As mentioned in the "Limitations of Research" section above, longitudinal studies that capture data from both employer and employee before, during and after an international assignment, may be required in order to capture richer, more dependable data about expectations and their formation.

This research has uncovered a number of classes or categories of assignment that appear to have distinct dynamics:

- Short-duration assignments, usually to North America, apparently task-oriented, from which the assignee returns to his or her original position;

- "Old China Hands": older employees, often with prior expatriate experience, assigned to Asia with little apparent developmental intent;

Researchers may wish to seek out such categories of assignment in their own data, partly to confirm the existence of such groups or categories, but also because direct comparison between such groups may not be appropriate.

Finally, this research poses a number of questions concerning the paradigms that international assignees bring to bear when they themselves contemplate the meanings of challenge, development and career.

References

References

- Adams, D., Harris H. and Muk, V. (1994) 'Preparation for expatriation: A survey of expatriate briefing requirements' (Cranfield University/Centre for International Briefing).
- Adams, J. (1963) 'Toward an understanding of inequity', Journal of Abnormal Psychology 67 422-436
- Adler, P. (1975) 'The transitional experience: an alternative view of culture shock', Journal of Humanistic Psychology 15(4) 13-23
- Adler, N. (1980) 'Re-entry: A study of the dynamic coping process used by repatriated employees to enhance effectiveness in the organisation and personal learning during the transition back into the home country', Dissertation, UCLA
- Adler, N. (1981) 'Re-entry: Managing Cross-Cultural Transitions', Group and Organisation Studies 6 (3) 341-356.
- Adler, N. (1986) '*International Dimensions of Organisational Behaviour*', PWS-Kent.
- Adler, N. (1991) "*International Dimensions of Organisational Behaviour* (2nd Edition) Boston PWS-Kent Publishing.
- Adler, N. and Bartholomew, S. (1992) 'Managing globally competent people', Academy of Management Executive 6(3) 52-65
- Alban-Metcalf, B. and Nicholson, N. (1984) '*The Career Development of British Managers*', British Institute of Management Foundation, ISBN 0 85946 137 8
- Alpander, G. (1973) 'Drift to authoritarianism: The changing managerial styles of the U.S. executives overseas' Journal of International Business, 4(2) 1-14.
- Amrop International, '*The New International Executive: Business Leadership for the 21st Century*'
- Argyris, C. (1960) "*Understanding Organisational Behaviour*", Homewood, Illinois: Dorsey Press
- Austin, C. (1986) 'A strategy for managing cultural transitions: Re-entry from training' in '*Cross-Cultural Reentry: A book of readings*', Austin, C. (Ed), Abilene Christian University Press ISBN 0-915547-74-0, 19-27

Baliga, G. and Baker, J. (1985) 'Multinational corporate policies for expatriate managers: selection, training, evaluation', Advanced Management Journal 50(4) 31-38

Bandura, A. '*Principles of behavior modification*', New York, Holt, Rinehart and Winston.

Baughn, C. (1992) 'Repatriation: Work role transitions in organizational reentry'. FICEM92, Hong Kong, November 1992, 144-149.

Berry, J. W., Kim U. and Boski P. (1988) 'Psychological Acculturation of Immigrants' in '*Cross-cultural adaptation: Current approaches*', Kim Y. Y. and Gudykunst W. B. (Ed): Sage Publications, Inc.

Bjorkman, J. and Gertsen, M. (1990) '*Corporate expatriation: An analysis of firm- and country-specific differences in Scandinavia*', Swedish School of Economics, Copenhagen Business School, December 1990, 1-39

Black, J. (1988) 'Work role transitions: A study of American expatriate managers in Japan', Journal of International Business Studies 19(2) 277-294

Black, J. (1989) 'Repatriation: a comparison of Japanese and American practices', Proceedings of the Third International Conference of the Eastern Academy of Management, Hong Kong, June 11-15 1989, pp45-49

Black, J. (1990) 'Locus of Control, Social Support, Stress, And Adjustment in International Transfers', Asia Pacific Journal of Management 7(1) 1-29

Black, J. (1991) 'Returning Expatriates Feel Foreign in their Native Land', Personnel, 68(8), 32-40

Black, J. (1992) 'Coming Home: The relationship of expatriate expectations with repatriation adjustment and job performance', Human Relations, 45(2) 177-191.

Black, J. and Gregersen, H. (1991a) 'Antecedents to cross-cultural adjustment for expatriates in Pacific Rim countries', Human Relations 44 497-515

Black, J. and Gregersen, H. (1991b) 'The other half of the picture: Antecedents of spouse cross-cultural adjustment', Journal of International Business Studies 22(3) 461-478

Black, J. and Gregersen, H. (1991c) 'When Yankee Comes Home: Factors related to Expatriate and Spouse Repatriation Adjustment'. Journal of International Business Studies 22(4) 671-695)

Black, J. and Gregersen, H. (1992) 'O Kairinasai: The role of job expectations during repatriation for Japanese Managers', Human Relations 47(12)

Black, J., Gregersen, H. and Mendenhall, M. (1992a) '*Global Assignments: successfully expatriating and repatriating international managers*', Jossey-Bass Inc, San Francisco CA USA, ISBN 1-55542-473-2

Black, J., Gregersen, H. and Mendenhall, M. (1992b) 'Toward a theoretical framework of repatriation adjustment' Journal of International Business Studies, Fourth Quarter 1992, 737-760

Black, J. and Mendenhall, M. (1990) 'Cross-Cultural Training Effectiveness: A review and a theoretical framework for future research'. Academy of Management Review 15(1) 113-136.

Black, J. and Mendenhall, M. (1991) 'The U-Curve Adjustment Hypothesis Revisited: A review and theoretical framework', Journal of International Business Studies, 2nd Quarter 1991, 225-247

Black, J., Mendenhall, M. and Oddou, G. (1991) 'Toward a comprehensive model of international adjustment: an integration of multiple theoretical perspectives'. Academy of Management Review 16(2) 291-317.

Black, J. and Stephens, G. (1989) 'The influence of the spouse on American expatriate adjustment in overseas assignments', Journal of Management 15(4) 529-544

Blaikie, N. (1993) '*Approaches to social enquiry*', Cambridge: Polity Press.

Borg, M. (1988) "*International Transfers of Managers in Multinational Corporations*", Uppsala, ISBN 9-554-2136-9

Boyacigiller, N. (1990) 'The role of expatriates in the management of interdependence, complexity and risk in multinational corporations', Journal of International Business Studies 21(3) 357-381

Brett, J. (1980) 'The effect of transfer on employees and their families' in Cooper C and Payne R (eds) 'Current Concerns in Occupational Stress'. Chichester: Wiley

Brett, J. and Werbel, J. (1980) '*The effect of job transfer on employees and their families: Final report*', Washington, D.C.: Employee Relocation Council

Brewster, C. (1988) '*The Management of Expatriates: A Report on the Selection and Training of Expatriates by European MNCs*', Cranfield School of Management Human Resources Research Centre, Monograph 2, ISBN 0947 767 851, Cranfield.

Brewster, C. (1989), Data from unpublished study of expatriation policies of European MNCs. Quoted in Brewster, C. (1991), *'The Management of Expatriates'*, London, Kogan Page

Brewster, C. (1991) *'The Management of Expatriates'*. London, Kogan Page.

Brewster, C. (1993) 'The Paradox of Adjustment: UK and Swedish Expatriates in Sweden and the UK', Human Resource Management Journal 4(1) 49-62

Brewster, C. and Burnois, F. (1991) 'A European perspective on Human Resource Management', Personnel Review 20(6) 4-13

Brewster, C. and Harris, H. (1998) 'The Coffee Machine System: How international selection really works', International Journal of Human Resource Management (Forthcoming, 1998).

Brewster, C. and Hegewisch, A. (1994) (Eds), *'Policy and Practice in European Human Resource Management'*, London, Routledge

Brewster, C. and Myers, A. (1989) 'Managing the Global Manager - New Research Data'. Conference 'Managing in a Global Economy', Hong Kong, June 11-14 1989

Brewster, C. and Pickard, J. (1994) 'The International Transfer of Managers: Preparation and Training of MNC Managers for International Assignments' in Segal-Horn S. (Ed) *'The Challenge of International Business'* London: Kogan Page ISBN 0 7494 1163 5

Brewster, C. and Scullion, H. (1997), 'A review and agenda for expatriate HRM', Human Resource Management Journal 7(3) 32-41.

Brislin, R. (1981) *'Cross cultural encounters'*, New York, Pergamon Press

British Institute of Management Studies (1988) 'Factsheet No.1 - The Management of Expatriates'.

Buckley, P. and Casson, M. (1988) 'A theory of cooperation in international business', in Farok J Contractor and Peter Lorange (eds) *'Competitive Strategies in International Business'*, Lexington, Mass: Lexington Books

Buzzanell, P. and Goldzwig, S. (1981) 'Linear and Nonlinear Career Models: Metaphors, Paradigms, and Ideologies', Management Quarterly Review 4(4) 466-505.

Church, A. T. (1982) 'Sojourner Adjustment', Psychological Bulletin 91 540-572

Clague, L. and Krupp N. (1978) 'International personnel: the repatriation problem'. The Personnel Administrator, April 1978, 29-33,45)

Cobley, R. 'Expatriate Compensation - social security and company pensions'. Benefits and Compensation International, February 1987, 17-20.

Cohen, E. (1977) 'Expatriate Communities'. Current Sociology, 24(3) 5-133.

Cohen, S. (1980) 'After effects of stress on human performance and social behavior: a review of research and theory', Psychological Bulletin, 88 82-108

Copeland L and Lewis G (1985), '*Going International*'. New York: Random House)

Daspin, E. (1985) 'Managing expatriate employees', Management Review, July 1985 47-49

Dawis, R. V. and Lofquist, L. H. (1984) '*A psychological theory of work adjustment*', Minneapolis: University of Minnesota Press

Dean, O. and Popp, G. (1990) 'Intercultural communication effectiveness as perceived by American managers in Saudi Arabia and French managers in the USA', International Journal of Intercultural Relations Vol.14 405-424

Derr, C. and Laurent, A. (1989) 'The internal and external career: A theoretical and cross-cultural perspective'. In Arthur, M., Laurence, P. & Hall, D. (Eds), "*Handbook of career theory*", Cambridge, UK: Cambridge University Press

Derr, C. and Oddou, G. (1993) 'Internationalising Managers: Speeding up the process', European Management Journal 11(4) 435-442

Di Cieri, H., Dowling, P. and Taylor, K. (1991) 'The psychological impact of expatriate relocation on partners', International Journal of Human Resource Management 2(3) 377-414

Dowling, P. (1986) '*International Personnel/Human Resource Management: An overview and synthesis*', University of Melbourne Graduate School of Management Working Paper No.21 September 1986 ISBN 0 86839 8

Dowling, P. and Schuler, R. (1990) '*International dimensions of Human Resource Management*', PWS-Kent Publishing Co, ISBN 0 534 91946 4

Dowling, P. and Welch, E. (1988) 'International Human Resource Management: An Australian perspective', Asia Pacific Journal of Management 6(1) 39-65

Dunbar, E. (1989), 'An evaluation of the expatriate assignment: A survey report', Dissertation, Teachers College, Columbia University.

Dunbar, E. and Katcher, A. (1990) 'Preparing managers for foreign assignments'. Training and Development Journal, September 1990, 45-47

Dunning, J. 'Multinational Enterprises and the Global Economy' New York: Addison-Wesley 1993.

Earley, C. (1987) 'Intercultural training for managers: A comparison of documentary and interpersonal methods', Academy of Management Review 30(4) 685-698

Edstrom, A. and Galbraith, J. (1977) 'Alternative policies for international transfer of managers'. Management International Review 17(2) 11-22.

Ehrenberg A. (1975), '*Data Reduction*', Bristol, John Wiley & Sons, ISBN 0-471-23399-4

ECA (1994) 'Managing Mobility' Employment Conditions Abroad Ltd

Evans, P. (1988) 'Managing Career Development', Journal of Management Development 7(6) 5-13

Evans, P., Doz, Y. and Laurent, A. (1989), 'Human Resource Management in International Firms', London, Macmillan Press.

Fagenson, E. (1989) 'The mentor advantage: perceived career/job experiences of protégés versus non-protégés', Journal of Organizational Behavior 10 309-320

Feldman, D. (1991) 'Repatriate moves as a career transitions', Human Resource Management Review 1 163-178

Feldman, D. and Thomas, D. (1992) 'Career Management Issues Facing Expatriates', Journal of International Business Studies, 2nd Quarter 1992 271-293

Ferguson G. (1976), '*Statistical Analysis in Psychology and Education*', Fourth Edition, Tosho Printing Co. Ltd., Tokyo, ISBN 0-07-020480-2

Ferner, A. (1994) 'Multinational Companies and Human Resource Management: an Overview of Research Issues'. Human Resource Management Journal 4(2) 79-102.

Forster, N. (1994) 'The forgotten employees ? The experiences of expatriate staff returning to the UK'. The International Journal of Human Resource Management 5(2) 405-425.

Forster, N. (1997) "The persistent myth of high expatriate failure rates": a reappraisal', International Journal of Human Resource Management, August 1997

Forster, N. (1999) "Another 'Glass Ceiling'? The Experiences of Women Professionals and Managers on International Assignments", Gender, Work and Organization 6(2) 79-90

Forster, N. and Johnsen, M. (1996) 'Expatriate Management Policies in UK Companies New to the International Scene', International Journal of Human Resource Management 7(1) 179-205

Furnham, A. and Bochner, S. (1986) '*Culture Shock: Psychological reactions to unfamiliar environments*', London, Methuen (1986)

Gardner, G. (1962) 'Cross-cultural communication', Journal of Social Psychology, 58, 241-256

Gill, J. and Johnson, P. (1991), 'Research Methods for Managers', Paul Chapman Publishing, London, ISBN 1-85396-119-1

Goffee, R. and Scase, R. (1997) 'Organizational Change and the Corporate Career: The Restructuring of Managers' Job Aspirations', Human Relations 45(4) 363-385.

Gomez-Mejia, L. and Balkin D. (1987) 'The Determinants of Managerial Satisfaction with the Expatriation and Repatriation Process', Journal of Management Development 6(1) 7-17

Greenberg, J. and Baron, R.A. (1993) '*Behavior in Organizations*' 4th Edition

Gregersen, H. (1992) 'Commitment to a parent company and a local work unit during repatriation', Personnel Psychology, 45 29-54

Gregersen, H. and Black, J. (1995) 'Keeping High Performers after International Assignments: A Key to Global Executive Development', Journal of International Management 1(1) 1-29

Gregersen, H., Hite, J. and Black, J. (1996) 'Expatriate performance appraisal in US multinational firms', Journal of International Business Studies 27(4)

Guba, E. G. and Lincoln, Y. S. (1994) 'Competing Paradigms in Qualitative Research' in '*Handbook of Qualitative Research*', Denzin, N. and Lincoln, Y., Sage Publications

Gullahorn, J.T. and Gullahorn, J.E. (1963) 'An extension of the U-Curve hypothesis', Journal of Social Issues 19(3) 33-47

Gullick, C. (1990) '*Expatriate British Executives and Culture Shock*', Culture Studies, Third World Societies Pub. No. 42 February 1990

Guzzo, R. (1996) 'The Expatriate Employee; in "*Trends in Organisational Behaviour*" Volume 3, Cooper, C. and Rousseau, D (Eds), Wiley

Hamel, G. and Prahalad, C. (1994) "*Competing for the Future*", Harvard Business School Press

Hamill, J. (1989) 'Expatriate policies in British multinationals'. Journal of General Management 14(4) 18-23.

Hannigan, T. (1990) 'Traits, attitudes and skills that are related to intercultural effectiveness and their implications for cross-cultural training: a review of the literature', International Journal of Intercultural Relations 14(1) 89-111

Harris, H. (1995) 'Women's Role in International Management' in Harzing, A. and Van Ruysseveldt, J. 'International Human Resource Management', London: Sage

Harris, H. and Brewster, B. (1999) "International human resource management: The European Contribution" in '*International HRM: Contemporary issues in Europe*', Brewster, C. and Harris, H. (Eds), Routledge, London, 1-28

Harris, P. and Harris, D. (1976) 'Intercultural Education for International Managers', International and Intercultural Communications Annual 3 70-85

Harris, P. and Moran, R (1979) '*Managing Cultural Differences*', Houston: Gulf Publishing Co.

Harris, P. and Moran, R (1987) '*Managing Cultural Differences*' 2nd Edition, Houston: Gulf Publishing Co.

Harvard-Amrop Study: "*The New International Executive: Business Leadership for the 21st Century*", Amrop International

Harvey, M. (1982) 'The Other Side of Foreign Assignments: Dealing with the Repatriation Dilemma'. Columbia Journal of World Business, Spring 1982, 53-59)

Harvey, M. (1983) 'The multinational corporation's expatriate problem: an application of Murphy's Law', Business Horizons, Jan/Feb 1983 71-78

Harvey, M. (1985) 'The executive family: an overlooked variable in international assignments', Colombia Journal of World Business, Spring 1985 84-92

Harvey, M. (1989) 'Repatriation of corporate executives: An empirical study', Journal of International Business Studies 20(1) 131-144

Harvey, M. (1997) "'Inpatriation' training": The next challenge for international human resource management', International Journal of Intercultural Relations 21(3) 393-428

Harzing, A. K. (1995) 'The persistent myth of high expatriate failure rates', The International Journal of Human Resource Management 6(2) 457-474

Hawes, F and Kealey D., (1981) 'An empirical study of Canadian technical assistance: adaptation and effectiveness on overseas assignment', International Journal of Intercultural relations 4 239-258

Hays, R. (1971) 'Ascribed behavioral determinants of success-failure among US expatriate managers', Journal of International Business Studies Vol.2 40-47

Hays, R. (1974) 'Expatriate selection: Insuring success and avoiding failure', Journal of International Business Studies Vol.5 25-37

Hays (1988) '*Statistics*' 4th Edition, Austin, Texas: Holt, Rinehart and Winston ISBN 0-03-002464-1

Hayes, J. and Hough, P. (1976) 'Career Transitions as a Source of Identity Strain' in '*The Experience of Transition*', Adams et al (Ed)

Heller, J. (1980) 'Criteria for selecting an international manager'. Personnel, May-June 1980, 47-55.

Herriot, P. (1998) 'The role of the HR function in building a new proposition for staff' in "*Human Resource Management - The New Agenda*", Sparrow, W. & Marchipton, M. (Eds) Pitman 106-116

Herzberg, F. (1968) 'One More Time: How do you motivate employees?' Harvard Business Review, Jan-Feb 1968 54-62.

Herzberg, F., Mausner, B. and Synderman, B. (1959) 'The Motivation to Work', 2nd Ed, New York: John Wiley & Sons

Hofstede, G. (1980) '*Culture's Consequences*', Beverly Hills, Calif.: Sage.

Hofstede, G. (1980) 'Motivation, leadership and organization: Do American theories apply abroad'. Organizational Dynamics, Summer 1980, 42-63.

Howard, C. (1974) 'The returning overseas executive: Cultural shock in reverse', Human Resource Management, Summer 1974 22-26

Howard, C. (1979) 'Integrating returning expatriates into the domestic organization'. The Personnel Administrator, January 1979, 62-65.

Howard, C. (1980) 'The expatriate manager and the role of the MNC', Personnel Journal 59(10) 838-844

Howard, C. (1982) 'How best to integrate expatriate managers in the domestic organization'. Personnel Administrator, July 1982, 27-33.

Hughes, J. (1990) '*The Philosophy of Social Research*', Longman.

IPD (1997) Institute of Personnel and Development press release 11 July 1997 'Globetrotting expats will hang up their boots predicts IPD'.

Jackson, T. (1997) 'Perspective: The myth of the global executive', Financial Times Special Report, October 8 1997

Janssens, M. (1992) 'International Job Transfers: A comprehensive model of Expatriate Managers' Cross-cultural Adjustment'. PhD Dissertation at Catholic University of Leuven, Psychology Department.

Jelinek M and Adler N (1988) 'Women: World-class managers for global competition', Academy of Management Executive, 2(1) 11-19

Johnston, J. (1991) 'An empirical study of the repatriation of managers in UK multinationals', Human Resource Management Journal 1(4) 102-109

Kanter, R. (1983) 'The change masters', London: Allen and Unwin 1983

Kanter, R. (1989) 'The pursuit of skill and reputation: security and loyalty in a post-entrepreneurial world' in "*When Giants Learn to Dance: Mastering the Challenges of Strategic Management and Careers in the 1990s*", Unwin.

Kauppinen, M. (1994) 'Antecedents of Finnish expatriate adjustment in the United States'. Academic dissertation thesis for Licentiate of Science in Economics, Helsinki School of Economics and Business Administration, Centre for International Business Research, Helsinki, Finland.

Kauppinen, M. and Gregersen, H. 'Towards a more comprehensive approach to expatriate adjustment research: mode can make a difference'.

Kealey, D. (1990) 'Cross-cultural effectiveness: A study of Canadian Technical Advisors Overseas', Quebec: Canadian International Development Agency

Kealey, D. J. and Protheroe, D. R. (1996) 'The effectiveness of cross-cultural training for expatriates: an assessment of the literature on the issue', International Journal of Intercultural Relations 20(2) 141-165

Kendall, D. (1981), 'Repatriation: and ending and a beginning', Business Horizons 24(6) 21-25

Kerlinger, F. (1986) '*Foundations of Behavioral Research*', Third Edition, Holt, Rinehart and Winston Inc, New York, ISBN 0-03-910713-2

Kets de Vries, K. and Balazs, K. (1996) 'The Human Side of Downsizing', European Management Journal 14(2) 111-120

Kettley, P. (1995) "Employee Morale during Downsizing", Institute for Employment Studies

Kobrin, S. (1988) 'Expatriate Reduction and Strategic Control in American Multinational Corporations', Human Resource Management 27(1) 63-75

Labovitz, G. (1977) 'Managing the personal side of the personnel move abroad'. S.A.M. Advanced Management Journal, Summer 1977, 26-39.

Landis, D. and Brislin, R. (1983) '*Handbook on intercultural training*', Vol. 1, Pergamon Press, New York

Lanier, A. (1979) 'Selecting and preparing personnel for overseas transfers', Personnel Journal March 1979 160-163

Laurant, A. (1986) 'The cross-cultural puzzle of International Human Resource Management', Human Resource Management 25 91-102

Layder, D. (1990) '*The Realist Image in Social Science*', Macmillan: Basingstoke.

Levinson, H. (1965) 'Reciprocation: The relationship between man and organization', Administrative Science Quarterly, 9, 370-390.

Louis, M. (1980) 'Career transitions: Varieties and commonalties', Academy of Management Review 5(3) 329-340

Lundy, O. and Cowling, A. (1996) "*Strategic Human Resource Management*", Routledge London ISBN 0 415 13603 2

Luostarinen, R. and Welch, L. (1990) '*International Business Operation*', Helsinki: Kyriiri Oy.

Marginson, P. (1994) 'Multinational Britain: Employment and Work in an International Economy'. Human Resource Management Journal 4(4) 63-80.

Marginson, P., Edwards, P., Armstrong, P. and Purcell, J. (1994) 'Strategy, Structure and Control in the Changing Corporation: A Survey-Based Investigation'. Human Resource Management Journal 5(2) 3-26.

Markham W., Harlan S. and Hackett E. (1987) in 'Research in personnel and human resource management', Rowland, K. and Ferris, G. (Eds), JAI Press

Marrani, N. (1992) 'Management competencies applied to expatriates', European Research Project, European School of Management, March 1992, pp11-66.

Marshall, J. and Cooper, C. (1979), '*Executives under pressure*', London: Macmillan

Martin, C. (1986) 'Accessing and interviewing senior managers', Graduate Management Research 2(2) 13-23

Martinez, J. and Jarillo, J. (1991) 'The evolution of research on coordination mechanisms in multinational corporations', Journal of International Business Studies 20(3) 489 - 514

Maslow, A. (1954) '*Motivation and Personality*' New York, Harper

Mayrhofer (1992) 'Ethnocentrism revisited: In defense of an "outdated" staffing approach in the European context', Cranfield: workshop on international and expatriate management, 21 September

Mayrhofer, W. and Brewster, C. (1996) 'In praise of ethnocentricity: Expatriate policies in European multinationals', The International Executive 38(6) 749-778

Mendenhall, M., Dunbar, E. and Oddou, G. (1987) 'Expatriate Selection, Training and Career-Pathing: A Review and Critique', Human Resource Management, 26(3) 331-345

Mendenhall, M. and Oddou, G. (1985) 'Dimensions of Expatriate Acculturation', Academy of Management Review, 10 39-47

Mendenhall, M. and Oddou, G. (1986) 'Acculturation Profiles of expatriate managers: implications for cross-cultural training programs', Columbia Journal of World Business, 21(4) 73-79

Miller, E. and Cheng, J. (1976) 'Circumstances that Influenced the Decision to Accept an Overseas Assignment'. Academy of Management Proceedings, 1976, 336-339.

Miller, E. and Cheng, J. (1977) 'A factor analytic study of the circumstances that influenced the decision to accept an overseas assignment across German and American expatriate managers', Proceedings Academy of Management 1977

Miller, E. and Cheng, J. (1978) 'A closer look at the decision to accept an overseas position', Management International Review Vol.18 25-33

Misa, K. and Fabricatore, J. (1979) 'Return on investment of overseas personnel'. Financial Executive, April 1979, 42-46

Mitchell, T. (1982) 'Motivation: New directions for theory, research and practice', Academy of Management Review, 7, 80-88

Moran, R. and Harris, P. (1981) "*Managing Cultural Synergy*", Gulf Publishing, Houston.

Moran, R. and Riesenberger, J. (1994) "*The Global Challenge: Building the New Worldwide Enterprise*", New York: McGraw-Hill

Mullins, L. (1999) "*Management and Organisational Behavior*", FT Publishing

Munton, A. and Forster, N. (1993) '*Job Relocation: Managing people on the move*', London, Wiley

Murray, J. (1973) 'International Personnel Repatriation: Culture Shock in Reverse'. MSU Business Topics 21(3) 59-66.

Napier, N. and Peterson, R (1991) 'Expatriate re-entry: What do repatriates have to say?', Human Resource Planning 14(1) 19-28

Neuman, W. (1994) '*Social Research Methods - Qualitative and Quantitative Approaches*' 2nd Edition, Needham Heights, Massachusetts: Allyn and Bacon. ISBN 0-205-14548-5

Nicholson, N. (1984) 'A theory of work role transitions', Administrative Science Quarterly, 29 172-191

Nicholson, N. and West, M. (1988) '*Managerial Job Change*', Cambridge, Cambridge University Press.

O'Boyle, T. (1989) 'Grappling with the expatriate issue', Wall Street Journal, 11 December 1989.

Oberg, K. (1960) 'Culture shock: Adjustment to new cultural environments', Practical Anthropology 7 177-182

Oddou, G. (1991) 'Managing your expatriates: What the successful firms do', Human Resource Planning 14(4)

Oddou, G. and Derr, C. (1992) 'European MNC strategies for internationalizing managers: Current and future trends', Third Conference of International Personnel and Human Resources Management, 2-4 July 1992, Vol.1 17-26

Ondrack, D. (1985) 'International Transfers of Managers in North American and European MNEs', Journal of International Business Studies, 16, Fall, 1-19

Pahl, J. and Pahl, R. (1971) *'Managers and their wives'*. Harmondsworth: Penguin

Peltonen, T. (1997) 'Facing the Rankings from the Past: A Tournament perspective on repatriate career mobility'. International Journal of Human Resource Management 7(1) 106-123

Peltonen, T. (1998) 'Repatriation and Career Systems: Finnish public and private sector repatriates in their career lines', in Brewster and Harris (eds) 'International HRM: contemporary issues in Europe', Routledge, London

Phatak, A. (1974) *'Managing Multinational Corporations'*, New York, Praeger

Phatak, A. (1983) *"International Dimensions of Management"*, Boston Mass: Kent Publishing

Pickard, J. and Brewster, C. (1995) 'Repatriation: Closing the circle', International Human Resource Journal 4(2) 45-49

Popovich, P. and Wanous, J. (1982) 'The realistic job preview as a persuasive communication'. Academy of Management Review, 7(4) 570-578.

Porter, L. and Lawler, E. (1968) *"Managerial attitudes and performance"*, Homewood, IL.: Irwin

Raftery, T. (1989) 'International Compensation: A Reassessment', Benefits and Compensation International, 19(4) 22-25

Rahim, A (1983) 'A Model for Developing Key Expatriate Executives', Personnel Journal, 62 (4) 312-317

Reber, A. S. (1985) *'The Penguin Dictionary of Psychology'* Harmondsworth: Penguin ISBN 0-14-051079-6

Robson, C. (1993), *'Real World Research: a resource for social scientists and practitioner-researchers'*, Blackwell Publishers, Oxford, ISBN 0-631-17689-6

Ronen, S. (1986) *'Comparative and Multinational Management'* New York: Wiley

Rollinson, D., Aysen, B. and Edwards D. (1998) *"Organisational Behavior and Analysis"*, Addison Wesley

Rose, G. (1982), *'Deciphering Sociological Research'*, MacMillan, London, ISBN 0-333-28558-1

Rosenbaum, J. (1984). '*Career Mobility in a corporate hierarchy*', Orlando, Florida: Academic Press

Rosenbaum, J. (1989) 'Organization career systems and employee misperceptions'. In M. B. Arthur, D. T. Hall and B. S. Edwards (Eds), '*Handbook of career theory*' Cambridge Mass, Cambridge University Press 329-353.

Sahdev, K. and Vinnicombe, S (1998) 'Downsizing and survivor syndrome: A study of HR's perception of survivors' responses', Cranfield School of Management Working Paper SWP 6/98, Cranfield University ISBN 1 85905 119 7

Schein, E. (1971) 'The Individual, the Organization, and the Career: a Conceptual Scheme', The Journal of Applied Behavioral Science, 7 401-426.

Schein, E. (1988), "*Organisational Psychology*", Prentice Hall

Schuler, R., Dowling, P. and de Cieri, H. (1993) 'An integrative framework of strategic international human resource management', International Journal of Human Resource Management, 5(4) 717-764

Scullion, H. (1991) 'Why companies prefer to use expatriates', Personnel Management, November 1991 33-35

Scullion, H. (1992) 'Strategic recruitment and development of the 'International Manager': some European considerations', Human Resource Management Journal 3(1) 57-69

Scullion, H. (1993) 'Creating international managers: Recruitment and development issues in Kirkbride, P. (Ed) '*Human Resource Management in Europe*', London, Routledge

Scullion, H. (1994) 'Staffing policies and strategic control in multinationals', International Studies of Management and Organisation 3(4) 86-104

Scullion, H. (1995) 'International Human Resource Management) in Storey, J. (Ed.) '*Human Resource Management*', London: Routledge

Scullion, H. (1998) 'International HRM in medium sized MNEs: Evidence from Ireland', in Brewster, C. and Harris, H. (Eds) '*Contemporary Issues in European HRM*', London: Routledge

Seebert, K. (1994) 'Enhancing the effectiveness of foreign assignments', Journal of International Compensation and Benefits, May/June 1994 40-45

Shahzad, N. (1984) 'The American expatriate manager's role and future in today's world', Human Resource Planning 7(1) 55-61

Smith, H. (1975), 'Strategies of Social Research', Prentice-Hall, Englewood Cliffs, ISBN 0-13-851147-0

Smith, L. (1975) 'The hazards of coming home'. Dun's Review, October 1975, 71-73.

Smith, M., Beck, J., Cooper C., Cox, C., Ottaway, D. and Talbot, R. (1982) *"Introducing Organizational Behaviour"*, University of Manchester

Smith, P. (1992) 'Organisational Behaviour and National Cultures', British Journal of Management, 3 39-51

Sofer, C. (1970) *'Men in mid-career: A study of British managers and technical specialists'*. Cambridge, Cambridge University Press

Sparrow, R. (1998) 'Reappraising Psychological Contracting', International Studies of Management and Organisation 28(1) 30-63

Sparrow, P. and Hiltrop, J. (1994) *"European Human Resource Management in Transition"*, Prentice Hall, ISBN 0 13 202095 5

Stephens, G. and Black, J. 'The impact of the spouse's career orientation on managers during international transfers', Journal of Management Studies 28 417-428

Stickland, R. (1996) 'Career Self-Management - Can We Live without It?', European Journal of Work and Organizational Psychology 5(4) 583-596

Stiles, P., Gratton, L., Hope-Hailey, V. and McGovern, P. (1997) 'Performance management and the psychological contract', Human Resource Management Journal, 7(1) 57-66

Storey, J., Okazaki-Ward, L., Gow, I., Edwards, P. and Sisson, K. (1991) 'Managerial careers and management development: A comparative analysis of Britain and Japan', Human Resource Management Journal 1(3) 33-57

Suutari, V. and Brewster, C. (1998), 'Expatriate management practices and their perceived relevance: evidence from Finnish expatriates', Personnel Review 27(2) 89-103

Torbiorn, I. (1976) *"Living Abroad - A Study of the Adjustment of Swedish Overseas Personnel"*, Stockholm: SNS

Torbiorn, I. (1982) *'Living Abroad: Personal Adjustment and Personnel Policy in the Overseas Setting'*, Wiley, New York

Tung, R. (1981) 'Selecting and Training of Personnel for Overseas Assignments', Colombia Journal of World Business 16(1) 68-78.

Tung, R. (1982) 'Selection and Training Procedures of US, European and Japanese Multinationals', California Management Review, 25 (1) 57-71

Tung, R. (1984) 'Strategic management of Human Resources in the multinational enterprise', Human Resource Management 23(2) 129-143.

Tung, R. (1986) 'Corporate executives and their families in China: the need for cross-cultural understanding in business', Columbia Journal of World Business, Spring 1986, 21-25.

Tung, R. (1987) 'Expatriate assignments: enhancing success and minimising failure', Academy of Management Executive, 1(2) 117-126

Tung, R. (1988a) *'The New Expatriates. Managing Human Resources Abroad'*, Ballinger Publishing Company, Cambridge, Mass.

Tung, R. (1988b) 'Career Issues in International Assignments'. Management Executive 11(3) 241-244.

Tung, R. (1997) 'Exploring International Assignees' Viewpoints: A study of the expatriation/repatriation process', Arthur Andersen, <http://www.arthurandersen.com/ies/globalhr/tungsurv.htm> 1997

Tung, R. (1998) 'American Expatriates Abroad: from Neophytes to Cosmopolitans', Journal of World Business 33(2) Summer 1998 125-144.

Tyson, S. and York, A. (1990) *"Personnel Management Made Simple"*, UK: Heinemann

Vivian, J. (1968) 'Expatriate Executives: Overpaid but Undercompensated', Colombia Journal of World Business, Jan/Feb 1968 29-40

Vroom, V.H. (1964) *'Work and Motivation'*, New York: Wiley

Ward, C. and Searle, W. (1991) 'The impact of value discrepancies and cultural identity on psychological and sociocultural adjustment of sojourners', International Journal of Intercultural Relations Vol.15 209-225

Weissman, D. and Furnham, A, (1987) 'The expectations and experiences of a sojourning temporary resident abroad', Human Relations 40(5) 313-326

Welch, D. (1990) 'The personnel variable in international business operations: a study of expatriate management in Australian companies', PhD thesis, Monash University, Melbourne

Welch, D. (1991) 'Determinants of International Human Resource Management Approaches and Activities: A suggested framework', Norwegian School of Management and Institute for Management Research Working Paper April 1991.

Welch, D and Welch, L. (1994) 'Linking operation mode diversity and IHRM', The International Journal of Human Resource Management 5(4) 911-926

Young, D (1993) '*The Headquarters Fact Book*', Ashridge Strategic Management Centre, London England

Zeira and Banai (1984) 'Present and Desired Methods of Selecting Expatriate Managers for International Assignments', Personnel Review, 13(3) 29-35

Appendix A

Draft Letter requesting an interview

Specimen Letter

[Cranfield School of Management Headed Paper]

[Date]

[Manager's Name]
[Manager's Title]
[Company Name]
[Company Address]

Dear [salutation]

I am a PhD researcher with Cranfield School of Management investigating the Management of Expatriate Personnel.

You will be aware of the important role played by expatriates within [your company] and of the high costs involved in their recruitment, training and maintenance. My research is intended to provide information to assist employers in the management and utilisation of expatriate personnel; a crucial and costly resource. I am particularly interested in the problems encountered by personnel who return from an expatriate assignment for reintegration into their home-base organisation.

I am gathering primary data about British expatriates in association with the Centre for International Briefing at Farnham Castle.

In order to gain insight into current management of British expatriates from a Company perspective I would like to interview you about the general policies and strategies applied to the recruitment, selection, preparation and support of expatriate personnel by you and your organisation. Such an interview would require about 40 minutes of your time.

While material based on the outcome of this and other interviews will be published in due course, care will be taken to ensure that neither your organisation nor any individual will be identifiable from that material.

To cause you minimum inconvenience I propose to telephone your Personal Assistant in a week's time to see if we can arrange a meeting.

Yours sincerely

Juana M. Pickard

Appendix B: Expatriate Questionnaire

Research into Expatriation

Expatriate Survey

Cranfield School of Management

Farnham Castle: The Centre for International Briefing

A Joint Project

**An International Research Project
which aims to increase our
understanding of the unique needs
and wants of expatriates and
their partners**

1991

Juana Pickard

Cranfield School of Management

Cranfield School of Management is one of Europe's leading university management schools. It is part of Cranfield Institute of Technology, a mainly post graduate university with an international reputation in management, aeronautics, engineering and other fields.

The school offers an internationally recognised full and part-time MBA programme as well as an extensive range of short courses and general management programmes for practicing managers.

The School of Management's primary aim is to develop effective managers by providing the highest quality of relevant and pragmatic management education.

Cranfield recognises that research is fundamental to its teaching activities and to the development of its programmes. The emphasis, however, is on applied research intended to produce results of value to decision makers in industry, commerce and public sector organizations.

How to answer this questionnaire

This questionnaire is designed to make completion as easy and fast as possible

In tests it took about 30 minutes to complete

Most questions may be answered by simply clicking boxes

The questionnaire is divided into seven sections, as follows:

Section 1: General Information

Please answer this section

Section 2: Selection for the Expatriate Assignment

Please answer this section

Section 3: Preparation for the Expatriate Assignment

Please answer this section

Section 4: Assessment of the Farnham Castle Briefing

Please answer this section

Section 5: Expatriate Links with the Corporate Home Base

Please answer this question if:

- (i) you have arrived in your assigned country, or**
- (ii) you have completed the expatriate assignment**

Please do NOT answer section 5 if you have not yet departed for your destination country.

Section 6: Return from the Expatriate Assignment

Please answer this section if you have completed your assignment

Section 7: Reintegration into the Home Base Environment

Please answer this section if:

- (i) you have completed your expatriate assignment AND**
- (ii) you have returned to work in your home-base country.**

Some of the questions are clearly aimed at salaried corporate employees. If this does not match your own circumstances (for example, if you are a missionary or voluntary worker) then you may find some questions unfamiliar. If any question is clearly inappropriate to your own circumstances, please leave it unanswered.

How to answer this questionnaire (2)

If you would like to expand or comment on any of your answers, or if there are any aspects of expatriation that you feel have not been covered, please make use of the blank sheets at the end of this questionnaire.

Throughout this questionnaire the word ORGANIZATION means the firm, company, local authority, government department or organization for whom you were working at the time.

A second questionnaire is enclosed for your partner.

If appropriate, please ask your partner to complete it.

The completed partner's questionnaire may be returned in the same envelope as yours.

If the partner's questionnaire is not completed it need not be returned.

Please return the completed questionnaire in the accompanying pre-addressed envelope

No stamp is required if posted in the UK.

This questionnaire is being sent to expatriates in over 80 countries.

It has not been possible to arrange free return from outside the UK.

If possible, please make use of your organization's postal facilities

Thank you very much for your assistance and cooperation

Section 1: General Information

1.1 Please state your name:

1.2 Please state your sex:

Male

Female

1.3 Please state your nationality:

1.4 Please state your current postal address:

Please state your postal address in six months time:
(if known, and if different from above)

1.5 Please tick the statement below which BEST describes your present expatriate status:

I have been selected for an expatriate assignment, but have not yet departed.

I am part-way through an expatriate assignment.
I have been here for months

I have completed an expatriate assignment.
I returned months ago.

1.6 Please complete the following statements:

At the time that I was selected for the expatriate assignment:

1.6a - I was years old

1.6b - I was Married Single Other

If "other" please specify

1.6c - I had dependent children

1.6d - Their ages were:

(Please enter the age, in years, of each dependent child)

Section 1(2): General Information

1.7 My educational qualifications include: (Please tick as many boxes as appropriate)

- 1.7a **Technical or Specialist Diploma**
- 1.7b **First Degree**
- 1.7c **Masters Degree**
- 1.7d **Doctorate**
- 1.7e **Professional Qualifications**
- 1.7f **Membership of Professional Body(ies)**

Section 2 - Selection for the Expatriate Assignment

2.1 When selected for the expatriate assignment, what was your occupational speciality ?

- Technical Specialist
- Marketing or Selling
- Finance and/or Administration
- Middle Management
- General Manager or Directorship
- Other (please specify)

2.2 What was your employment status at the time ?

2.2a Employed by:
Please name the organization

2.2b at
Please name the town or city

2.2c my job title

2.2d I had worked there for years

- Self Employed
- Unemployed
- A student

Section 2 (2) - Selection for the Expatriate Assignment

2.3 Please tick the statement below which best describes how you were recruited for your latest expatriate assignment:

I was recruited internally, within the organization which was employing me at the time.

I was recruited by, and became employed by an organization specifically to undertake the expatriate assignment.

If so, please name the organization:

I was recruited by a procurement agency on behalf of the organization wishing to employ me for the expatriate assignment.

If so, please name the agency:

and the organization:

None of the above (please explain in your own words):

2.4 What did you expect to happen when the assignment ended ?

Return to employment with:

Be employed by:

Become Self Employed

Become Unemployed

None of the above (please explain in your own words)

Section 2 (3) - Selection for the Expatriate Assignment

2.5 What country were you assigned to ?

2.6 How long did you expect the assignment to last ?

The duration of the assignment was not defined.

I expected the assignment to last for: **Years** **Months**

2.7 Did you have any previous expatriate work experience before this assignment ?

This is my first expatriate assignment

I have previous expatriate experience as follows:

Country	Start	Year	Duration	
			Years	Months

Section 2(4) - Selection for the Expatriate Assignment

2.8 There are a number of statements below.

Please consider whether you would have agreed or disagreed with each statement at the time that you were selected for the expatriate assignment.

		Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
2.8a	I actively sought this assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.8b	I expect the assignment to be financially rewarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.8c	I expect the assignment to be challenging and/or exciting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.8d	I expected the assignment to improve my career prospects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.8e	I was pleased to be selected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.8f	I was surprised to be considered for the expatriate assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.8g	Such an expatriate assignment is normal practice in my organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.8h	I joined the organization because I wanted to travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.8i	I believe that my selection shows that my achievements and/or track record were recognised and appreciated by my organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.8j	I expect to learn from the assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2.9 In your own words, please explain WHY you accepted this assignment:

Section 2(5) - Selection for the Expatriate Assignment

2.10 There is a list of subjects below.
 Please consider to what extent each subject was discussed with you during the process which led to your selection for the expatriate assignment

	In Depth	To Some Extent	Not At All
2.10a Duties and responsibilities during the assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.10b Salary and allowances during the assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.10c The position of partner and/or family during the assignment (If this is not appropriate to you, do not answer)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.10d Career prospects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.10e The foreign culture/environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.10f The assignment work environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.10g The job you would have on return from the assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.10h Why you had been selected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.10i Preparation and/or training for the assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2.11 Please tick the box which best describes the selection process:

- Generally Informal
- Generally formal
- Both formal and informal

Section 2(6) - Selection for the Expatriate Assignment

If you were recruited for the expatriate assignment INTERNALLY, that is, within the organization that was employing you at the time, please answer questions 2.12 and 2.13 which follow below.

Otherwise, please go straight on to Section 3 (Question 3.1)

2.12 Who made the final decision to select you for the foreign assignment ?

- My line manager
- Personnel Department
- Director(s)
- The department responsible for the destination country
- The management or board in the destination country

2.13 During the selection process, who discussed the assignment with you ?
(Please tick as many boxes as appropriate)

- 2.13a My line manager
- 2.13b Personnel Department
- 2.13c Director(s)
- 2.13d The department responsible for the destination country
- 2.13e The management or board in the destination country

Section 3 - Preparation for the Expatriate Assignment

3.1 How much time elapsed (or is expected to elapse) between selection and departure ?

Weeks

3.2 Have you been (or will you be) provided with training and/or preparation for the foreign assignment ?

		YES Before Departure	YES After Arrival	NO	No, none is necessary
3.2a	Language training (self)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2b	Language training (partner)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2c	Language Training (children)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2d	Cultural training (self)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2e	Cultural training (partner)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2f	Cultural training (children)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2g	Job-oriented training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.2h	Other training (please specify)				
	<input style="width: 300px; height: 25px; border: 1px solid black; border-radius: 10px;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input style="width: 300px; height: 25px; border: 1px solid black; border-radius: 10px;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Section 3(2) - Preparation for the Expatriate Assignment

3.3 Have you received (or do you expect to receive) any of the following types of training ?

		YES	NO
3.3a Familiarization visit(s) to the destination country	(self)	<input type="checkbox"/>	<input type="checkbox"/>
3.3b	(partner)	<input type="checkbox"/>	<input type="checkbox"/>
3.3c	(children)	<input type="checkbox"/>	<input type="checkbox"/>
3.3d Meeting(s) with recent returnee(s) from the destination country	(self)	<input type="checkbox"/>	<input type="checkbox"/>
3.3e	(partner)	<input type="checkbox"/>	<input type="checkbox"/>
3.3f	(children)	<input type="checkbox"/>	<input type="checkbox"/>

3.4 Please complete the following sentence:

I estimate that training and preparation for the expatriate assignment

occupied (or will occupy) me for days

occupied (or will occupy) colleagues for man-days

3.5 Between selection and departure, were you temporarily assigned to a different job, department, section or location within the organization for which you were working, in order to familiarize yourself with some aspect(s) of the assignment ?

No

Yes, for

weeks

Section 5 - Expatriate Links with the Corporate Home Base

5.1 During your assignment, how often do you return to your home base for business reasons ?

Monthly

Quarterly

Six-Monthly

Annually

Never

5.2 If you do visit your home base, how long, on average, does each visit last ?

days

5.3 Is there one specific person or department in your home base with whom you can discuss your career within the organization ?

No

Yes

If YES, please name: the person's job title:

and/or the department:

5.4 During the assignment, how often are you visited by home-based personnel with whom you can discuss your career within the organization ?

Monthly

Quarterly

Six-Monthly

Annually

Never

If such visits take place:

How long, on average, does each visit last ?

days

Please name the visitor's job title:

and/or his department:

Section 5(2) - Expatriate Links with the Corporate Home Base

5.5 How are you kept informed about your home-base organization ?

(Please tick as many boxes as appropriate)

- 5.5a House Magazines
- 5.5b Continued contact with your home-base department by written messages
- 5.5c Continued contact with your home-base department by telephone
- 5.5d Personal briefing in your assigned country
- 5.5e Personal briefing during visits to your home-base country
- 5.5f Group briefing in your assigned country
- 5.5g Group briefing during visits to your home-base country
- 5.5h Other means (please specify)
- 5.5i None of the above

**5.6 How effective is communication between you and your home-base organization
in keeping you up-to-date with:**

	Very Effective	Quite Effective	Ineffective	No Communication	Don't Know
5.6a Personnel changes within your home-base department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.6b Job opportunities within your home-base department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.6c Aims and strategies of your home-base department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.6d Personnel changes within the organization as a whole	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.6e Job opportunities within the organization as a whole	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.6f Aims and strategies of the organization as a whole	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 5(3) - Expatriate Links with the Corporate Home Base

5.7 Is there a formal procedure in place to appraise your performance and/or potential during the expatriate assignment ?

5.7a No

Yes

If YES, please describe the appraisal mechanism by ticking as many boxes as appropriate:

5.7b Appraisal takes place locally, at the assigned location

5.7c I am appraised by my local manager

5.7d I am appraised by my local personnel department

5.7e I am appraised by visitors from my home-base department

5.7f I am appraised by visitors from my home-base personnel department

5.7g Appraisal takes place during visits to the home base

5.7h I am appraised by my home-base department

5.7i I am appraised by my home-base personnel department

Copies of the appraisal documents are held by:

5.7j Local management

5.7k My home-base department

5.7l My home-base personnel department

Section 6 - Return from the Expatriate Assignment

6.1 How long did the assignment last ? Years Months

6.2 How much notice did you receive of a definite date for return ? Months

6.3 Did you have any choice about returning at this time ?

No Yes

If YES, please explain why you chose to return at this time:

6.4 In order to answer this question, please cast your mind back to the last few days of the assignment, when you knew that your return was imminent.

Try to answer the question with the feelings that you had at that time.

There are a number of statements below.

Please consider whether you agree or disagree with each statement, then tick the appropriate box.

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
6.4a During the assignment I learned how to work and manage across cultural boundaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4b I enjoyed more autonomy than I had experienced at my home base	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4c I held more responsibility than at my home base	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4d The experience has made me a better manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4e The assignment has enhanced my particular specialist expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4f I am glad that I accepted the assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4g I am pleased to return to my home base	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4h I would welcome another expatriate assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 6(2) - Return from the Expatriate Assignment

6.5 When you left the foreign assignment, did you expect to return to, or be placed into a job by the organisation for which you were working ?

No Yes

IF YOU ANSWERED "NO" PLEASE GO ON TO SECTION 7 (QUESTION 7.1)

6.6 Before you departed from the expatriate assignment, had you discussed your deployment on return ? (Please tick as many boxes as appropriate)

6.6a Yes, with local management in the expatriate country

6.6b Yes, with my home-base department

6.6c Yes, with my home-base personnel department

6.6d Yes, with my home-base international department

6.6e Yes, with:

6.6f No

6.7 Please cast your mind back to the last few days of the assignment when you knew that your return was imminent. Try to answer the question with the feelings that you had at that time.

There are a number of statements below. Please consider whether you agree or disagree with each statement, then tick the appropriate box.

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
6.7a I expect the return to my home-base to be financially rewarding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.7b I expect the return to my home-base to be exciting and/or challenging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.7c I expect the return to my home-base to provide skill/experience which I lack	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.7d I expect the return to my home-base to enhance my career prospects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 6(3) - Return from the Expatriate Assignment

6.8 When you departed from the expatriate assignment, how much did you know about the job to which you would be assigned on return ?

(Please tick one box only)

- I knew exactly what I was going to do
- I knew the department in which I would be working, but not the exact job
- I did not know exactly what job I would be doing, but knew approximately what it would be
- I had no idea at all

Section 7 - Reintegration into the Home-Base Environment

This section asks questions about your reintegration into a home-base work environment, following an expatriate assignment.

If you have not returned from the expatriate assignment, or have not yet returned to work, please do not answer this section

- 7.1** There are a number of statements below.
Please consider whether you agree or disagree with each statement, then tick the appropriate box.

		Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
7.1a	I am satisfied with the status which my job provides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1b	My job is suitable for my talents and expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1c	I am pleased with the geographical location of my workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1d	I am satisfied with the autonomy which my job provides	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1e	My job gives me more autonomy than I would like	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1f	I am satisfied with the responsibility that my job requires	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1g	My job carries more responsibility than I would like	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1h	My job allows me to make use of the experience which I acquired in the expatriate assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1i	The expatriate assignment has enhanced my potential usefulness to my employer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1j	I am pleased that I accepted the expatriate assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1k	If I could turn the clock back, I would accept the assignment again	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 7(2) - Reintegration into the Home-Base Environment

7.1 There are a number of statements below.
Please consider whether you agree or disagree with each statement, then tick the appropriate box.

		Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
7.1l	I would recommend a colleague to accept an expatriate assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1m	The expatriate assignment has enhanced my short-term career prospects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.1n	The expatriate assignment has enhanced my long-term career prospects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7.2 There is a list of subjects below.
Please consider to what extent each subject was discussed with you after your return from the expatriate assignment. Then tick the most appropriate box.

		In Depth	To Some Extent	Not At All
7.2a	Your achievements during the expatriate assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2b	What you had learned during the expatriate assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2c	Structural and/or personnel changes within your home-base department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2d	Aims and strategies of your home-base department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2e	Aims and strategies of the organization as a whole	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2f	Your deployment after return	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2g	Your salary and/or allowances after return	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2h	Your career prospects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2i	Other (please specify) 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 7(3) - Reintegration into the Home-base Environment

7.3 With whom did discussions take place ? (Tick as many boxes as appropriate)

7.3a Line management in your home-base department

7.3b Personnel Department

7.3c International department or international personnel department

7.3d With one or more directors

7.3e Others (please specify)

7.3f None of the above

7.4 How much time elapsed between your return and your finally settled position ?

 Months

 Days

Of this, how much was due to:

leave/holiday Months

 Days

training Months

 Days

7.5 Did any of the following occur ? (Tick as many boxes as appropriate)

7.5a Extended leave for Months

 Days

7.5b Temporary assignment for Months

 Days

7.5c Unsuitable assignment for Months

 Days

7.5d I resigned after Months

 Days

Thank you for your cooperation !

Research into Expatriation

Expatriate Survey

Cranfield School of Management

Farnham Castle: The Centre for International Briefing

A Joint Project

Please return the completed questionnaire, together with your partner's, to:

Juana Pickard

Cranfield School of Management

Cranfield

Bedford MK43 0AL

England

Inside Back Cover

Appendix C: Expatriate Partners **Questionnaire**

Research into Expatriation

Expatriate Partners Survey

Cranfield School of Management

Farnham Castle: The Centre for International Briefing

A Joint Project

**An International Research Project
which aims to increase our
understanding of the unique needs
and wants of expatriates and
their partners**

1991

Juana Pickard

Cranfield School of Management

Cranfield School of Management is one of Europe's leading university management schools. It is part of Cranfield Institute of Technology, a mainly post graduate university with an international reputation in management, aeronautics, engineering and other fields.

The school offers an internationally recognised full and part-time MBA programme as well as an extensive range of short courses and general management programmes for practicing managers.

The School of Management's primary aim is to develop effective managers by providing the highest quality of relevant and pragmatic management education.

Cranfield recognises that research is fundamental to its teaching activities and to the development of its programmes. The emphasis, however, is on applied research intended to produce results of value to decision makers in industry, commerce and public sector organizations.

How to answer this questionnaire

This questionnaire is aimed at the PARTNER of an EXPATRIATE

By EXPATRIATE we mean someone who has undertaken a work assignment outside his or her own home-base country.

This questionnaire is designed to make completion as easy and fast as possible

In tests it took about 20 minutes to complete

Most questions may be answered by simply clicking boxes

If you would like to expand on your answers, or if there are aspects of expatriation that you feel have not been covered, please make use of the blank sheets at the end of the questionnaire.

The questionnaire is divided into four sections, as follows:

Section 1: General Information

Please answer this section

Section 2: Assessment of the Farnham Castle Briefing

Please answer this section

Section 3: The Expatriate Experience

Please answer this question if:

- (i) you have arrived in your assigned country, or**
- (ii) you have completed the expatriate assignment**

Please do NOT answer section 3 if you have not yet departed for your destination country.

Section 4: Return from Assignment

Please answer this section if you have completed your assignment

Please return this questionnaire, together with your partner's, in the accompanying pre-addressed envelope.

Thank you very much for your assistance and cooperation

Section 1: General Information

1.1 Please state your name:

1.2 Please state your partner's name:

1.3 Please state your nationality:

1.4 How many children accompanied you (or will accompany you) to the expatriate assignment ?

their ages were:

Number of children

(Please enter the age of each accompanying child)

their sexes were:

(Please enter the sex of each accompanying child)

1.5 Did you do paid work outside the home BEFORE the expatriate assignment ?

NO

YES, my job title was:

1.6 Did you do voluntary work outside the home BEFORE the expatriate assignment ?

NO

YES

1.7 In your own words, what has been the effect of the expatriate assignment on your career ?

1.8 Five statements appear below.

Please tick the one statement which is closest to describing your own case.

On balance I encouraged my partner to accept the expatriate assignment

On balance I discouraged my partner from accepting the assignment

On balance I neither encouraged nor discouraged my partner
in accepting the expatriate assignment.

I was not consulted when my partner accepted the expatriate assignment

We were not partners at the time

Section 3 - The Expatriate Experience

3.1 Did you do paid work outside the home DURING the expatriate assignment ?

NO

YES, my job title was:

3.2 Did you do voluntary work outside the home DURING the expatriate assignment ?

NO

YES

3.3 Three statements appear below. Please tick the statement which best describes the size of the expatriate community at your location:

The expatriate community is large enough to influence the type and availability of, for example, foods and shopping facilities, medical facilities, schools and recreation opportunities.

The expatriate community is visible, but not large enough to modify the local environment significantly.

The expatriate community is insignificant or non-existent.

3.4 In general terms, how was your SOCIAL activity divided between interaction with host nationals and interaction with other expatriates ?
(Please tick one box only)

HOST NATIONALS:

Nearly All	Three Quarters	Half	One Quarter	Almost None
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OTHER EXPATRIATES:

Almost None	One Quarter	Half	Three Quarters	Nearly All
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3.5 In your own words, please describe your role as an expatriate's partner. What do you consider to be your main functions and responsibilities ?

Section 3(2) - The Expatriate Experience

**3.6 Some aspects of the local environment appear below.
Please consider how easy or difficult you found it to adjust to each aspect.**

	Very Easy	Easy	Neither easy nor Difficult	Difficult	Very Difficult
3.6a Interacting with host nationals on a day-to-day basis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6b Everyday Customs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6c General Living Conditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6d How host nationals view expatriates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6e How host nationals view women	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6f Socializing with host nationals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6g Interaction with the expatriate community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6h Climate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6i Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6j Transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6k Home Help	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.6l Medical Facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 4 - Return from Assignment

	Very Easy	Easy	Neither easy nor Difficult	Difficult	Very Difficult
4.1 How easy or difficult was it for YOU to adjust to the environment back home AFTER the expatriate assignment ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.2 How easy or difficult was it for YOUR CHILDREN to adjust to the environment back home AFTER the expatriate assignment ? (If this question is not appropriate, do not answer it)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Much Easier	Easier	About the same	Harder	Much Harder
4.3 Was it easier or harder for YOU to adjust to the expatriate country than it was to readjust to the environment back home ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.4 Was it easier or harder for YOUR CHILDREN to adjust to the expatriate country than it was to readjust to the environment back home ? (If this question is not appropriate, do not answer it)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.5 Would you choose to live overseas again ?					
	<input type="checkbox"/>	Yes, I definitely would			
	<input type="checkbox"/>	Yes, I probably would			
	<input type="checkbox"/>	I don't know			
	<input type="checkbox"/>	No, I probably would not			
	<input type="checkbox"/>	No, I definitely would not			

This page is left blank for your comments

A large rectangular area with horizontal lines, intended for writing comments. It consists of approximately 25 horizontal lines within a rounded rectangular border.

Research into Expatriation

Expatriate Partner's Survey

Cranfield School of Management

Centre for International Briefing

A Joint Project

Please return the completed questionnaire, together with your partner's, to:

Juana Pickard

Cranfield School of Management

Cranfield

Bedford MK43 0AL

England

Partner Questionnaire: Inside Rear Cover