

School of Management

**Expatriate Selection, Training, Family Issues and Repatriation
Putting Theory into Best Practice for Expatriate Success
in Australia, Singapore and Malaysia**

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Table of Contents

Table of Contents	1
Index of Figures	7
Index of Tables.....	9
Chapter One: Introduction and Delineation of the Problem	12
1.1. Background to the Research Study	12
1.2. Objectives of the Research Study	14
1.3. Expatriate Failure	16
1.4. Previous Attention to Problems of Expatriate Management.....	18
1.5. Staffing Alternatives for International Operations.....	19
1.6. Research Strategy.....	26
1.7. Organisation of the Research Report	30
1.8. Limitations	31
Chapter Two: Literature Review.....	33
2.1. Introduction.....	33
2.2. Factors in Expatriate Selection	35
2.3. Cultural and Task Performance.....	36
2.4. Avoiding the Costs of Failure	39
2.5. Technical Competence Versus Cross-Cultural Skills	40
2.6. Causes of Expatriate Failure	43
2.7. Spouse and Family Considerations	43
2.8. Instruments Used in Training Expatriates.....	45
2.9. Cross-Cultural Preparation.....	46

2.10. Matching Cross-Cultural Training to Personal Needs	51
2.11. Importance of Counselling and Training	52
2.12. Repatriation and Career Pathing	55
2.13. Factors Relating to Expatriate Failure	63
2.14. Summary	69
Chapter Three: Research Design.....	72
3.1. Introduction	72
3.2. Qualitative Research Approaches (General Description)	73
3.3. Qualitative Approach (Application in the Thesis)	78
3.4. Limitations of Quantitative and Qualitative Research	80
3.5. Qualitative Research Approach (Application in the Thesis)	83
3.6. Qualitative Research Approach	84
Chapter Four: Interview Findings	93
4.1. Introduction	93
4.2. Factors organisations use in making expatriate selection	94
4.2.1. Criteria Used in Selecting Expatriates	94
4.2.1.1. Technical Ability.....	96
4.2.1.2. Experience.....	98
4.2.1.3. Motivation.....	99
4.2.1.4. Recommendations.....	100
4.2.1.5. Cultural Ability	101
4.2.1.6. Suitability.....	102
4.2.1.7. Age	103
4.2.1.8. Availability.....	103

4.2.1.9. Internal Selection	104
4.2.1.10. Leadership & Managerial Ability	105
4.2.1.11. Future Input to the Company	106
4.2.1.12. Language Ability.....	107
4.2.1.13. Fill Local Needs with Local Staff	108
4.2.1.14. Company Ambassador	109
4.2.1.15. Career Development	110
4.2.1.16. Best Student	111
4.2.1.17. Children Age	112
4.2.1.18. Marital Status	113
4.2.1.19. Sexual Status	114
4.2.1.20. Racial Status.....	115
4.2.2. Selection Methods Used to Select Suitable Expatriate Managers	116
4.2.2.1. Interviewing	118
4.2.2.2. Observation/Appraisal	119
4.2.2.3. Written Test.....	120
4.2.2.4. Headhunting Methods	121
4.2.2.5. Host Country Experts.....	122
4.2.2.6. Demonstration	123
4.2.3. Involvement of Partner/Family in Selection	124
4.2.3.1. Supportive Family	126
4.2.3.2. Dual-Career	127
4.2.3.3. Spouse Support by Company/Organisation	128
4.2.3.4. Children's Education.....	131

4.2.3.5. Family Motivation to Go Overseas	132
4.2.3.6. Spouse Participation.....	133
4.2.3.7. Isolation and Poor Communication.....	134
4.3. Organisational Training of Expatriates	136
4.3.1. Pre-departure Training Activities for Managers	136
4.3.1.1. In-House.....	138
4.3.1.2. Cultural-Social	138
4.3.1.3. Pre-Assignment Overseas Visit	140
4.3.1.4. External Training	140
4.3.1.5. Language.....	141
4.3.1.6. Training Provided at Overseas Posting.....	142
4.3.1.7. Knowledge Transfer from Outgoing to Incoming Personnel.....	143
4.3.1.8. Previous Experience.....	144
4.3.1.9. Ad Hoc Situations	145
4.3.2. Pre-departure Training for Partners/Families	145
4.3.2.1. HR Help for Partner and Family	147
4.3.2.2. Informal Training for Partner and Family.....	148
4.3.2.3. Experience Sharing Between Outgoing Family and Ingoing Family	149
4.3.2.4. Very Little Training or None at All	150
4.4. Factors Relating to Repatriation and Career Planning.....	150
4.4.1. Re-entry Training or Support by the Organisation	151
4.4.1.1. 'Sink or Swim' Attitude.....	152
4.4.1.2. Repatriates Returning to Same or Worse Position.....	154
4.4.1.3. Finding Relevant Position in Company	155

4.4.1.4. No Re-Entry Counselling.....	155
4.4.1.5. Partner and Family Stress	156
4.4.1.6. Early Termination of Contract	157
4.4.1.7. Reverse Culture Shock.....	158
4.4.2. Positive Issues Concerning the Repatriation Process	159
4.4.2.1. Repatriation Strategy Prior to End of Assignment.....	163
4.4.2.2. Career Path Support	164
4.4.2.3. HRM Briefing/Rehabilitation Seminar	165
4.4.2.4. Repatriation Strategy Prior to Initial Departure Overseas	166
4.4.2.5. Family Counselling.....	167
4.4.2.6. Repatriation to Appropriate Department.....	168
4.4.3. Employees' Length of Stay After Return	168
4.5. Summary	170
Chapter Five: Analysis of Data.....	171
5.1. Chapter Overview	171
5.2. Research Questions	172
5.3. Expatriate Selection	173
5.4. Training of Expatriates.....	177
5.5. Family	179
5.6. Repatriation and Career Planning	180
5.7. National Differences	183
5.8. Summary	194
Chapter Six: Conclusions and Implications.....	196
6.1. Introduction.....	196

6.1.1. Research Question 1.....	196
6.2. Research Question 2.....	197
6.3. Research Question 3.....	199
6.4. Research Question 4.....	200
6.4.1. Inadequate Support for Repatriates.....	200
6.4.2. Successful Debriefing Programmes.....	201
6.5. Black, Mendenhall and Oddou's Adapted Model.....	201
6.6. Research Question 5.....	203
6.6.1. A Final Model Encompassing Asian and Australian Characteristics.....	207
6.7. Practical Advice.....	213
6.8. Implications for Organisations and Individuals.....	213
6.8.1. Continuing Research Options.....	215
6.8.2. Conclusions.....	217
REFERENCES.....	220
APPENDICES.....	228
Appendix One.....	228
Appendix Two.....	229
Appendix Three.....	230
Appendix Four.....	231

Index of Figures

Figure 1: Maintaining a Globalisation Momentum Through a Geocentric Staffing Policy	24
Figure 2: Interview Classification Based on Government or Private Sector	27
Figure 3: Interviews Based on Industry Classification.....	29
Figure 4: Breakdown of Successful Expatriate Experiences.....	38
Figure 5: Categories of Expatriate Manager Relations	48
Figure 6: A Model for Developing Key Expatriate Executives	50
Figure 7: Primary Reasons Companies Do Not Invest in Expatriate Training Programs.....	54
Figure 8: Towards A Comprehensive Model of International Adjustment: An Integration of Multiple Theoretic Perspectives	65
Figure 9: Interviews Based on Industry Classification.....	78
Figure 10: Interview Transcript.....	86
Figure 11A: Linear Interview Transcript	87
Figure 11B: NUD*IST Proprietary Format.....	88
Figure 12: Index Tree.....	90
Figure 13A: Criteria Used to Select Expatriates (Percentage of Companies)	95
Figure 13B: Criteria Used to Select Expatriates (Number of Companies).....	96
Figure 14A: Selection Method Used to Choose Expatriates (Number of Companies)	116
Figure 14B: Selection Method Used to Choose Expatriates (Percentage of Companies)	117
Figure 15A: Importance of Family Issues in the Expatriate Selection Process (Number of Companies) ..	125
Figure 15B: Importance of Family Issues in the Expatriate Selection Process (Percentage of Companies)	125
Figure 16A: Training Provided for Expatriates Prior to Overseas Assignment (Number of Companies) .	137
Figure 16B: Training Provided for Expatriates Prior to Overseas Assignment (Percentage of Companies)	137
Figure 17A: Training Provided for Family/Partner Prior to Overseas Assignment (Number of Companies)	146

Figure 17B: Training Provided for Family/Partner Prior to Overseas Assignment (Percentage of Companies).....	147
Figure 18A: Positive Issues Concerning Repatriation Process (Number of Companies).....	160
Figure 18B: Positive Issues Concerning Repatriation Process (Percentage of Companies).....	160
Figure 19: Criteria Used to Select Expatriates (Comparison)	184
Figure 20: Selection Method Used to Choose Expatriates (Comparison)	187
Figure 21: Importance of Family Issues in the Expatriate Selection Process (Comparison).....	189
Figure 22: Training Provided for Expatriates Prior to Overseas Assignment (Comparison)	190
Figure 23: Training Provided for Family/Partner Prior to Overseas Assignment (Comparison)	192
Figure 24: Positive Issues Concerning Repatriation Process (Comparison)	193
Figure 25: The Adjustment of Expatriates: Home, to Overseas, and Return	202
Figure 26: The Australasian Expatriate – Repatriate Career Cycle model	209

Index of Tables

Table 1: Ranking of Expatriate Selection Criteria.....	42
Table 2: The Causes of Expatriate Failure	43
Table 3: Training the International Assignee	51
Table 4: Steps for Improving the Repatriation Process	58
Table 5: Return/Recall Rates of Selected Companies	60
Table 6: Incidence of International Personnel Problems.....	62
Table 7: Interviews Based on Industry Classification	77
Table 8: Technical Ability.....	97
Table 9: Experience.....	98
Table 10: Motivation.....	99
Table 11: Recommendations.....	100
Table 12: Culture Ability	101
Table 13: Suitability.....	102
Table 14: Age.....	103
Table 15: Availability	104
Table 16: Internal Selection	105
Table 17: Leadership & Managerial Ability	106
Table 18: Future Input to the Company	107
Table 19: Language Ability.....	108
Table 20: Fill Local Needs with Local Staff	109
Table 21: Company Ambassador	110
Table 22: Career Development	111
Table 23: Best Student	112
Table 24: Children Age.....	113
Table 25: Marital Status	114
Table 26: Sexual Status	115

Table 27: Racial Status.....	115
Table 28: Interviewing	119
Table 29: Observation/Appraisal	120
Table 30: Written Test	121
Table 31: Headhunting Methods	122
Table 32: Host Country Experts.....	123
Table 33: Demonstration	123
Table 34: Supportive Family.....	126
Table 35: Dual-Career	127
Table 36: Spouse Support by Company/Organisation	129
Table 37: Children Education	131
Table 38: Family Motivation to Go Overseas	132
Table 39: Spouse Participation.....	133
Table 40: Poor Communication	134
Table 41: In-House.....	138
Table 42: Cultural-Social	139
Table 43: Pre-Assignment Overseas Visit.....	140
Table 44: External Training	141
Table 45: Language.....	141
Table 46: Training Provided at Overseas Posting	143
Table 47: Knowledge Transfer.....	144
Table 48: Previous Experience.....	144
Table 49: Ad Hoc Situations	145
Table 50: HR Help	148
Table 51: Informal Training.....	149
Table 52: Experience Sharing Outgoing-Ingoing.....	149
Table 53: Very Little Training or None at All	150
Table 54: 'Sink or Swim' Attitude.....	153
Table 55: Repatriates Returning to Same or Worse Position	154

Table 56: Finding Relevant Position in Company	155
Table 57: No Re-Entry Counselling.....	156
Table 58: Family Stress.....	157
Table 59: Early Termination of Contract	158
Table 60: Reverse Culture Shock.....	158
Table 61: Repatriation Strategy Prior to End of Assignment	164
Table 62: Career Path Support	165
Table 63: HRM Briefing/Rehabilitation Seminar	166
Table 64: Repatriation Strategy Prior to Initial Departure Overseas.....	167
Table 65: Family Counselling.....	167
Table 66: Repatriation to Appropriate Department.....	168
Table 67: Employees' Length of Stay After Return.....	169
Table 68: A comparison of Stone's (1994: 4) ranking and this study's ranking:	173
Table 69: Significant Differences Between Stone's Research and This Study	175
Table 70: Selection Criteria Comparison (Classified Regionally)	185
Table 71: Transition Strategies: How Organisations and Expatriates Can Smooth the Repatriation Process	210
Table 72: The Positive Implications to the Research Study	214
Table 73: The Challenges and Suggested Alternatives to the Research Study	214

Chapter One:

Introduction and Delineation of the Problem

1.1. Background to the Research Study

The growing internationalisation of the world's markets is drawing more and more players into the international business arena. Economic activity around the world has become increasingly integrated. Business interaction has become truly global in most industries. One of the most difficult challenges to international operations is the management of human resources. An effective and informed human resource management function is vital to the success of all firms with multinational operations. One result is that not only large multinational corporations, but also smaller and recently internationalised companies are encountering the problems associated with sending abroad their employees, so called expatriates.

For many companies, as Forster (1997) observes, the successful management of expatriate assignments will be an important part of the success of their overseas commercial activities in the early 2000s and beyond. For others, who are new to the international scene, the identification, training and development of international staff are fast becoming important strategic international human resource management issues.

The contribution to knowledge of this doctoral thesis is that it seeks to collect data, which will heighten the awareness of practitioners and academics alike to the need to deal appropriately with expatriate management. The reality is that many international and multinational organisations have had difficulty in selecting managers for overseas assignments. The importance of selecting the best candidates for expatriation should not be underestimated as not only do these candidates directly influence the international competitiveness of the organisations but they are also valued assets relative to their domestic counterparts.

According to Stone (1991) and Stedham and Nechita (1997) relatively little research has been undertaken to determine how companies actually select and train their expatriate personnel for overseas assignments and even less research has been undertaken to review the role of the worker's family or the preparations to ensure a smooth repatriation process.

These topics are critical for multinational firms because failed expatriate assignments are costly, not only to the company but also to expatriates and their families. For example, costs include loss of time and business opportunities, damaged relations with the firm's constituencies in the foreign country and, as Harvey (1989a) observes, a long-term negative impact upon the firm's reputation in the regional area. Failed expatriates, as Swaak (1995a) warns, could suffer major career setbacks and their personal lives might be put under considerable strain.

Estimates of the number of aborted overseas assignments vary, since it is difficult to obtain such data from international and multinational corporations. Shell (1993) observes that smaller organisations may believe that large organisations can provide answers to their practical problems but, in fact, large corporations are themselves coping with trends, such as a changing work ethos and dual career couples, which have made overseas assignment of their employees more problematic. This may have lead to employees being less willing to accept overseas assignments.

As Harzing (1995: 458) points out, *“when the pool of candidates gets smaller, it becomes increasingly important that the expatriates who are sent abroad are successful in their assignments: on the one hand, because a low failure rate reduces the number of candidates needed and, on the other hand, because a high failure rate is likely to discourage potential candidates, shrinking the pool even further.”*

1.2. Objectives of the Research Study

In light of the above background, this study analyses the selection, training, family issues, repatriation, and career path development of expatriates in selected international and multinational corporations in Australia, Singapore, and Malaysia. It delineates the current state of the art of overseas relocation programs in these regions; firstly by investigating the extant literature in the areas of expatriate personnel selection, training, repatriation and family concerns and, secondly, by conducting face to face interviews with senior international human resource managers who are responsible for the selection, training, and repatriation of staff in these organisations. By conducting these interviews

the many variables and issues relevant to the success or failure of expatriate assignments is explored. The transcripts of these interviews are analysed using the qualitative data analysis software QSR NUD*IST and are reported in Chapter Four. The findings and implications will be of strategic interest to senior management of the organisations, as well as those who manage expatriate workers.

The study is designed to address five questions:

- 1. What factors do organisations use in making expatriate selection?**
- 2. What measures do organisations use in the training of expatriates for overseas postings?**
- 3. What impact does the expatriate's family have on the success or failure of the overseas posting?**
- 4. What factors relate to the repatriation process and career planning?**
- 5. How do responses on expatriate recruitment, management, and repatriation differ across the target countries?**

Having examined these questions, the research will identify what organisational and management arrangements either assist or detract from the successful management of expatriate managers.

In the literature review, some general observations about the nature of expatriate failure is established from previous research, e.g.:

- Failure is a major problem (Black and Gregersen, 1999)
- Insufficient selection procedures (Ashamalla and Cocitto, 1997)

- Lack of adequate training (Rodrigues, 1997; Deresky, 2000)
- Inadequate recognition of family issues (Solomon, 1994; Abraham, 1998)
- Deficient repatriation procedures/policies (Shilling, 1993; Tung, 1998)

1.3. Expatriate Failure

Over the last twenty-five years, there has been ongoing discussion in management literature regarding expatriate failure. Much of the literature on the topic defined and measured expatriate failure as the percentage of expatriates returning home before their assignment contract expired and many articles argued that failure rates were high. However, more recent research by Brewster (1998), Forster (1994), Harzing (1995), and earlier research by Tung (1981, 1984) discounts high failure rates when measured as premature re-entry and contends that this might be a very inadequate way to measure expatriate failure. For example, it can be argued that those expatriates who stay on their assignment and who fail to perform adequately are more damaging to the organisation than those who return prematurely.

In addition, both Harvey (1982a) and Forster (1994) suggest that successful completion of a foreign assignment does not mean that the possibility of expatriate failure has been avoided. Returning home can sometimes pose even larger problems than the overseas assignment itself.

The repatriate, for instance, must face re-establishing oneself within the home organisation and readjust to the home culture. Failure to do so, for whatever reason, can

also be regarded as expatriate failure. Consequently, in this study, expatriate failure is defined as 'under-performance in overseas assignments, which could lead to premature or unsuccessful return to the parent company'. Attention is given to the reasons for failure, which draws on variables such as selection processes, training techniques, recruitment policies, cross-cultural training, cultural novelty, the importance of the family, and repatriation issues.

A Harvard University report by Swaak (1995a) concludes that many foreign assignments fail because the expatriates cannot adjust to the new environment, cannot cope with the greater challenges of an overseas assignment or do not have the needed technical competence and motivation. According to Solomon (1996) these 'silent' business killers include under-performance, low morale, and weakening relationships with customers and host nationals, damaged career path, damaged company image, lost opportunities, broken family relationships, and negative impact on successors.

Earlier research by Mendenhall, Dunbar, and Oddou (1987) recognised similar consequences. To the failed expatriate the consequences are several; such as loss of self-esteem, self-confidence, prestige among peers and family, and threatened identity. Expatriates, as Richards (1996) explains, likewise experience problems in integrating with the host culture and often suffer from psychological problems. In later chapters, the results of interviews with some fifty senior human resource managers are used to explore the meaning of expatriate failure and expatriate success.

1.4. Previous Attention to Problems of Expatriate Management

It is relevant and necessary, initially, to examine previous conceptual and empirical attention given to the problems of expatriate management within the context of international organisations and multinational corporations. International human resource literature has reflected, and currently reflects, the recognition that expatriate assignments must be managed effectively as such assignments are demanding of human and economic resources, particularly if unsuccessful.

It is advocated by a number of writers, including Anderson (1999), Sagiadellis and D'Netto (1997) and Pulatie (1985), that consideration of four key aspects contribute to a successful international assignment. These aspects are: selection, preparation, management support, and repatriation.

As Anderson (1999) observes from research conducted by Sullivan and Tu (1993) there are possibly three major factors to be considered when choosing an individual for an overseas assignment; these are technical and decision-making skills, personal characteristics, and the family situation. However, Tung (1984) who conducted extensive expatriate management research in Europe, Asia, and America reports that over eighty percent of senior administrators base the selection decision primarily on technical competence with insufficient emphasis on the potential expatriate's relational skills and family situation.

Black, Mendenhall, and Oddou (1991) and Shilling (1993) indicate that in order to prepare for expatriate relocation, organisations should have clear relocation policies, and a pre-departure orientation, as well as on-site cultural and adaptation training. Black and Gregersen (1999) and a number of researchers including Enderwick and Hodgson (1993) and Davidson and Kinzel (1997) have highlighted deficiencies in the preparatory activities undertaken by organisations for their expatriate personnel and families prior to departure. Family oriented support is not a priority for many organisations, yet a partner or family member who is not adjusting, is experiencing culture shock and/or displaying inappropriate actions for dealing with relocation will, according to Black and Gregersen (1999), affect the chances of expatriate success. This implies that not only should the expatriate's personal qualities be considered in addition to his or her technical ability, but so, too, should the personal qualities of the family. As Sagiadellis and D'Netto (1997) point out, an expatriate's partner could have their own successful career and may be reluctant to relocate. This could affect an expatriate's ultimate ability to adjust and succeed.

1.5. Staffing Alternatives for International Operations

There have been, and there will continue to be, many challenges to the human resource management function of any organisation domestic or international; however, given the greater complexity of managing international operations, the need to ensure high quality management is even more critical than in domestic operations. According to Laabs (1991), in today's highly competitive, global economy, where the other factors of production such as capital, technology, raw materials, and information are increasingly

able to be duplicated, the calibre of the people in an organisation will be the only source of sustainable competitive advantage available to international and multinational organisations. Corporations operating overseas need to pay careful attention to this most critical resource.

So, in an international business context, the environmental factors that impinge upon the decision to transfer human resources from one nation to another is subject to a multitude of factors that in many ways are similar to transfers of capital and technology, but, at the same time, far more intangible.

Essentially, as Gray and Clegg (2000), point out, an organisation that is exposed to the international arena in some form has three primary sources of human capital. These broad categories have been identified in the field of human resource management by a number of researchers, viz., Prasad and Shetty (1976), Dowling and Welch (1991) Hodgetts and Luthans (2000), and Rodrigues (1999). The organisation can choose a home country national, a host country national or a third country national. Each has its advantages and disadvantages and as McFarlin and Sweeney (1998) observe each is a function of the level of development of the host economy, perception of the local business environment and employer philosophy.

Home country nationals or parent country nationals are citizens of the country where the employer's head office is based and, according to Hodgetts and Luthans (2000), firms using this ethnocentric staffing approach do so because home country nationals are familiar with company goals, products, technology, policies and procedures. Historically,

companies have staffed key positions in their foreign affiliates with home country nationals. Tung (1998) found that American and European firms used home country nationals in less developed regions but preferred host country nationals in developed regions. The Japanese, however make considerably more use of parent country personnel in all geographic areas especially at the middle and upper level ranks. Even today, in Australia and New Zealand, for example, it is difficult to find a Japanese subsidiary, which does not have a home country national in the upper level ranks of the organisation. As Rodrigues (1998) comments Japanese international business corporations are reputed to adhere strongly to this ethnocentric view.

According to Deresky (2000) and Tung (1998), the most common reason for using the home country national approach is to start up operations where companies prefer to have their own people launch a new venture and who are equipped with the necessary technical and company expertise. This approach is not utilised as much now as it was in the past, perhaps principally because firms are keen to develop local managers thereby increasing their morale and loyalty to the subsidiary.

With a host country national or polycentric staffing approach local managers are hired to fill key positions in their own country. As Selmer, Kang, and Wright (1994: 48) point out *“many countries expect the corporation to employ local talent and this is a good way to meet their expectation”*. A company that wants to ‘act local’ would find obvious advantages in staffing with host country personnel as these people are naturally familiar with the local culture, language, and ways of doing business and they already have many contacts in place. A good point made by Deresky (2000) is that as far as cost is

concerned it is usually less expensive for a company to employ a local manager than to transfer one from headquarters. With an accompanying family and often at a higher rate of pay, transferring from headquarters is a particularly expensive policy when it turns out that the manager and family do not adjust, and return home prematurely. Local managers also tend to be instrumental in staving off, or more effectively dealing with, problems in sensitive political situations. Similarly, they can be an advantage in countries like Singapore and Malaysia, which have legal requirements that a specific proportion of the firm's top managers must be citizens of that country.

One disadvantage of a polycentric staffing policy, which Deresky (2000) mentions is the difficulty of coordinating activities and goals between the subsidiary and the parent company, including the potentially conflicting loyalties of the local manager. Poor coordination among subsidiaries of multinational organisations could constrain strategic options. An additional drawback of this policy is that the headquarter managers will not gain the overseas experience necessary for any higher positions in the firm that require the understanding, and coordination with subsidiary operations.

The organisation which chooses to employ a third country national, in effect, is opting for a global staffing approach where the best managers are recruited from inside or outside the company, regardless of nationality. Deresky (2000) and Rodrigues (1997) agree that the two most important reasons that organisations use this geocentric staffing approach are that these people have the necessary expertise or are judged to be the best ones for the job. To recruit the best managers from within or outside the company regardless of nationality is the normal practice of many European multinational

organisations. Asea Brown Boveri (ABB) has used this policy for some years and it is becoming an accepted practice by companies such as Shell, Unilever, Lever Bros, and IBM. This is also standard practice in America by organisations such as Coca-Cola, Pepsi-Cola, General Motors, and Xerox. As Rodrigues (1997) points out there are several important advantages of placing third country nationals (TCNs) in the overseas operations of international and multinational corporations.

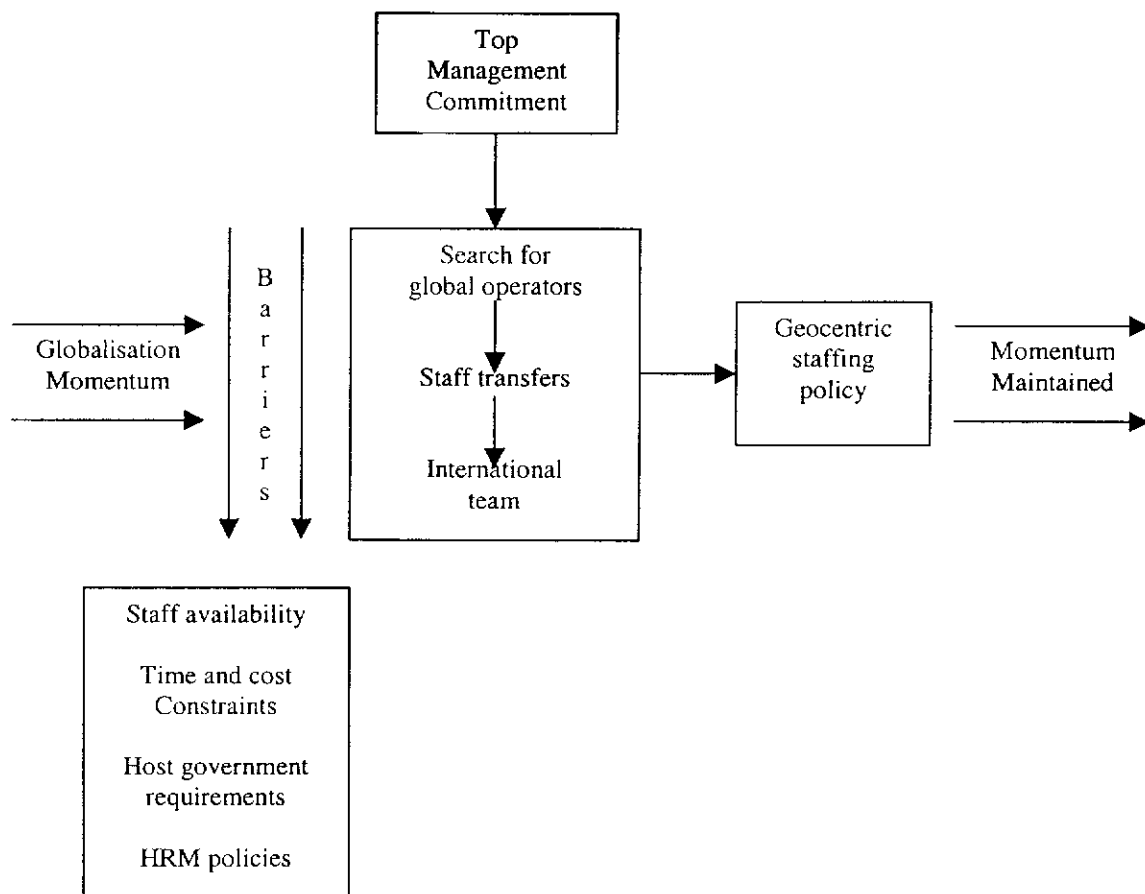
Firstly, this policy provides a larger pool of qualified applicants from which to choose and, in time, results in further development of a cadre of international executives. Secondly, the placement of TCNs as managers is perceived by employees as an acceptable compromise between head office and local staff and this works to reduce resentment. Another advantage is that third country nationals may have a very good working knowledge of the region and/or speak the same language as the local people. Hodgetts and Luthans (1997) suggest that this may explain why a number of multinational corporations, particularly in Canada and in the United States, choose British managers for top positions at subsidiaries in former British colonies such as India, Kenya, West Indies, and Jamaica. It also explains why successful multinationals like IBM, Gillette, and Coca-Cola take on local managers and train them to run overseas subsidiaries.

It appears, as Deresky (2000) suggests, that the more distant geographically and culturally the international operation, the more expatriates are used in key positions especially in less developed countries. This situation obviously arises out of concern about uncertainty and the ability to control implementation of the organisation's goals.

However, given the generally accepted consensus that staffing, along with structure and systems must fit the desired strategy, firms desiring a truly global posture should adopt a global staffing approach. That is easier said than done. As shown in Figure 1 (Welch, 1994: 52) such an approach requires the organisation to overcome barriers such as the availability and willingness of high-quality managers to transfer frequently around the world, spouse and dual career constraints, time and cost constraints, conflicting requirements of host governments, and ineffective human resource management policies.

Welch (1994: 52) illustrates a geocentric staffing policy in the following way:

Figure 1: Maintaining a Globalisation Momentum Through a Geocentric Staffing Policy



The three basic staffing approaches discussed above are important background information for the international human resource manager in the selection decision process of staff for overseas appointments. For an Australian working in South East Asia, for instance, the most relevant approach is ethnocentric where the employer is Australian and believes that home-country citizens should staff their foreign subsidiary, and 'geocentric' where the employer holds that nationality is irrelevant and the best candidate should be chosen.

Prasad and Shetty (1976) noted that certain employer characteristics had a bearing on the selection decision. In particular, they found that if the investment is for a short term, they might use expatriates given the lack of time to develop local nationals. Industry category, as Clegg and Gray (2000) explain, also is related to the staffing decision when, for example, in financial services or in law, employers may require locals with knowledge of domestic practices and regulations. However, in industries such as manufacturing and engineering they often require expatriates not only because of the high technical element, but also because of an understanding and experience with international 'best practices'.

Even prior to the preparation of a potential candidate for an overseas posting, it is important to identify the most suitable person in relation to their motivation, the skills-set required, the characteristics of the host country and factors such as their personality and adaptability to cultural change. Stone's (1991) research identified the top three criteria for the selection of Australian expatriates to be the ability to adapt, technical competence, and spouse/family adaptability.

Tung (1982) and Mendenhall and Oddou (1985) separately developed frameworks for identifying potentially effective expatriates with the latter specifying dimensions relating to elements such as tolerance, the capacity to empathise and 'cultural toughness'. The benefits of an orientation visit by the expatriate and the spouse have been advocated particularly by a number of researchers including McDonald (1993) and Edkins (1995). This view replicates the work of Oddou (1991), who emphasises the importance of information provision, including a paid visit to the location for the potential employee and his or her spouse. Deresky (2000) concurs with these views, pointing out that all phases of human resource management, without exception, should support the desired strategy of the organisation.

In the staffing phase, having the right people in the right places at the right time is a key ingredient to success in international operations. An effective managerial cadre can be a distinct competitive advantage for a firm.

1.6. Research Strategy

As discussed earlier in 1.2 Objectives of the Research Study, the study is based on five questions:

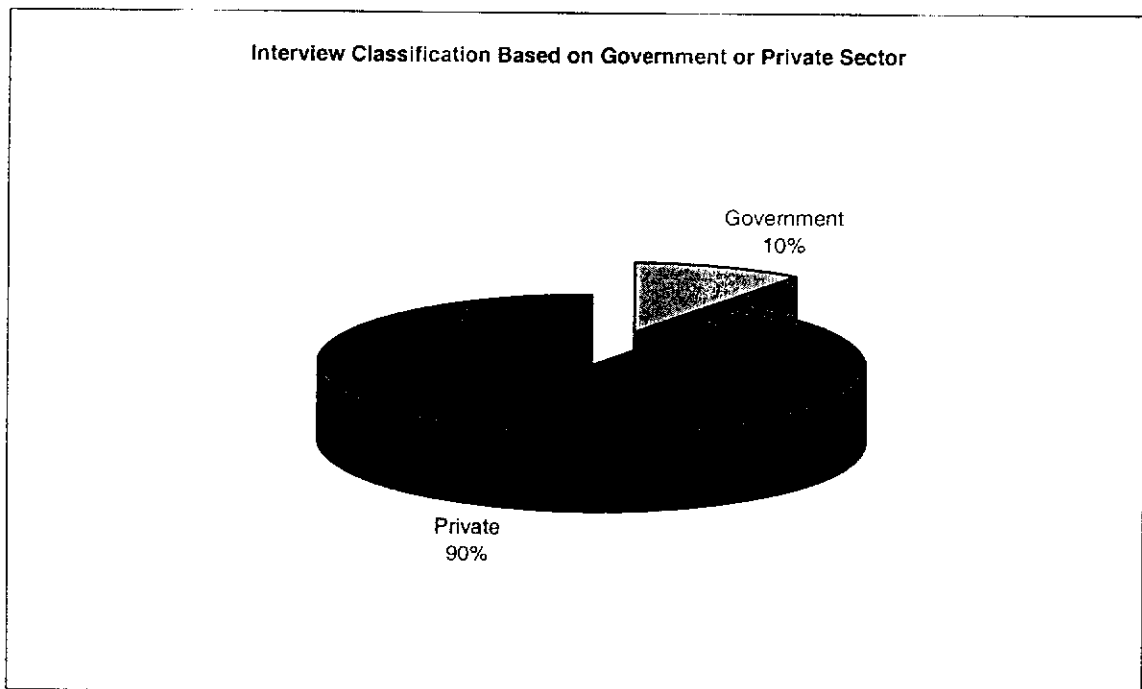
- 1. What factors do organisations use in making expatriate selection?**
- 2. What measures do organisations use in the training of expatriates for overseas postings?**
- 3. What impact does the expatriate's family have on the success or failure of the overseas posting?**

4. What factors relate to the repatriation process and career planning?
5. How do responses on expatriate recruitment, management, and repatriation differ across the target countries?

In order to assess what factors are important in choosing managers for overseas assignments, organisations operating internationally were contacted and asked to participate in the research.

On-site qualitative data gathering interviews with senior human resource managers of 50 organisations from the public and private sectors (see Figure 2) in Australia, Singapore, and Malaysia were conducted between late 1999 and mid 2001.

Figure 2: Interview Classification Based on Government or Private Sector

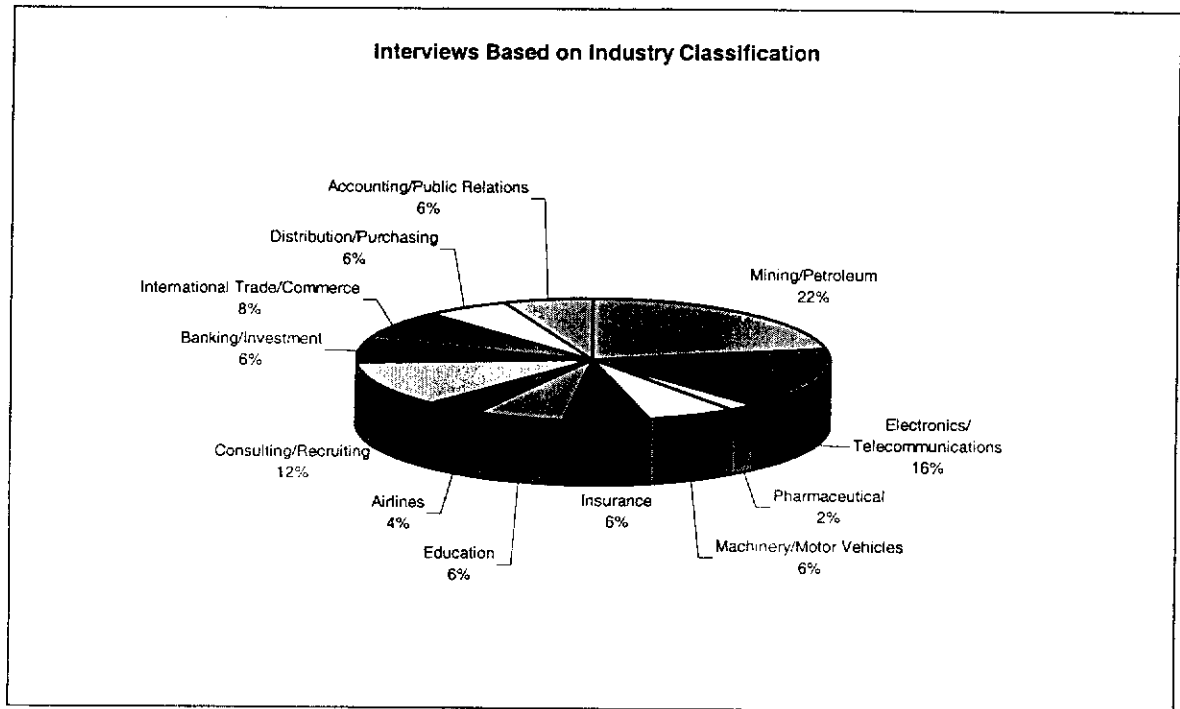


The organisations were chosen on the basis of their leadership in the export and international arenas and were drawn from a broad cross-section of Government and Industry including Banking, Insurance, Finance, Mining, Manufacturing, Distribution, and Government Departments.

Figure 2 and 3 show piecharts of interview classifications based on government sector organisations and private sector organisations. Regarding government organisations interviewed, these related to Federal Government Agencies involved in International Aid and Trade programmes with long term (over two years to four years) expatriates overseas. Additionally, relevant state government departments were interviewed in Western Australia, Victoria, and New South Wales and Statutory Bodies such as Airlines and Telecommunication organisations with expatriates overseas were included.

The majority of interviews (90%) were conducted in the private sector. These were, predominantly, well established international/multinational corporations who had been in the overseas business arena for many years and which ranged from 30 employees to well over 350 employees. All organisations interviewed had expatriates in long term positions overseas i.e. between 2-4 years. The number of expatriates in these organisations ranged from four to, in the case of airlines, mining, and oil companies, in excess of thirty personnel.

Figure 3: Interviews Based on Industry Classification



The interviews were semi structured, tape recorded, and typically lasted an hour. The tape-recorded interviews were transcribed verbatim into manageable text units suitable for processing in NUD*IST by means of a coding and retrieval system to assist in the development of categories. NUD*IST is an acronym for Non-numerical, Unstructured, Data in qualitative research supported by Indexing, Searching, and Theorising (QSR User Guide, 1994: 2). NUD*IST is capable of storing text and references in an index system (a hierarchical system called trees), where concepts are organised and stored into categories for exploration of emerging ideas (Richards & Richards, 1993).

The interviewees were invited to respond to questions based on the five major research questions. For each major question, a number of direct sub-questions were prepared (see Appendix).

A sample of the interview questions asked is as follows:

1. What criteria do you use in selecting expatriates?
2. What selection methods do you use to choose suitable expatriate managers?
3. Do you contact the partner/family of the candidate?
4. How important do you consider the family/partner contact to be in the selection process?
5. Based on your experience with successful expatriates, what selection methods do you consider the most useful?

1.7. Organisation of the Research Report

The report of this research contains separate chapters that describe a general introduction to the topic, a literature review, research methodology, and analysis of data results, findings, and implications arising from investigation findings.

Chapter Two outlines the literature review with information on factors in expatriate selection, cultural and task performance and avoiding the costs of failure. Discussion of technical competence versus cross-cultural skills and the causes of expatriate failure is followed by spouse and family considerations and cross-cultural preparation and training. Matching cross-cultural training to the specific demands of the appointment and the importance of counselling is followed by a discussion on repatriation, career pathing, and factors relating to expatriate failure, with a summary of the relevant themes that are apparent within the literature.

Chapter Three explains the research methodology and presents a description of the investigation design and research questions. Qualitative and quantitative data choices are contrasted and an account of the administration of qualitative interviews is followed by an explanation of the data analysis process.

Chapter Four presents the interview results, identifies patterns in the responses, and analyses them for their relevance to the research questions. The descriptions of results is a precursor to an examination of the findings presented in Chapter Five, which records the study's findings and implications and suggests recommendations for practitioners and considers opportunities for further research.

1.8. Limitations

Firstly, this study is concerned with expatriate management, with research using a sample of fifty organisations; conclusions drawn by the study, therefore, need to be considered in the light of the temporal and positional limitations. Secondly, the results of the study can only suggest trends in factors relating to expatriate failure and success and add an amount of information to wider research. Certainly, it would be unwise to apply any conclusion as a universal generalisation to the issue of expatriate failure. Thirdly, there is the ever-present threat of cultural bias (sometimes described as ethnocentrism), which can impact on all aspects of research including the conceptualisation of the research problem and methodology. It is considered that this factor was present to some degree, particularly in respondent answers to the interview questions posed to Singaporean and Malaysian

companies, where a more 'positive spin' on answers may have been given in preference to a more accurate or negative response.

It was the researcher's original intention to achieve an even spread of fifty interviews between the three countries involved. In the event, two thirds of interviewees were from Australian organisations and one third from Singapore/Malaysia. This imbalance can be put down to the conservative culture and reluctance towards researchers and research programmes in the latter countries.

Chapter Two, which follows, gives a review of the literature on expatriate management investigating in particular, the literature on expatriate selection, training, the influence of the family, and repatriation issues.

Chapter Two:

Literature Review

2.1. Introduction

Chapter one presented a view of the broad issues of expatriation success and failure based on an understanding of the management of expatriation growing in importance because of recent rapid increases in global activity and global competition. Harris and Brewster (1999) contend that as multinational enterprises increase in number and influence so the role of the expatriate in those multinational enterprises grows in significance. Indeed, as Tung (1984) and Dowling et al.(1994) point out, the effectiveness of these expatriates and the management of them are recognised as major determinants of success or failure in international business. The human and financial costs of failure in the international business arena are more severe than in domestic business, although recent research in Europe (Harzing, 1995) suggests that such failure may be less common than is generally believed. Indirect costs for the organisation, such as the loss of market share and damage to overseas customer relationships, may be considerable and, as Zeira and Banai (1984) explain, may well be exacerbated by the effect on the confidence of the local employees in the multinational organisation.

The evidence (Bird and Dunbar, 1991; Beamish, 1997; Richards, 1996) is clear that, despite advances in our understanding of expatriate success and failure, many companies

underestimate the complex nature of human resource management in international operations; business failures in the international arena often may be linked directly to the poor management, selection and training of expatriates.

The objective in this chapter is to review the literature on expatriate training, selection, and repatriation by addressing the following five research questions:

- 1. What factors do organisations use in making expatriate selection?**
- 2. What measures do organisations use in the training of expatriates for overseas postings?**
- 3. What impact does the expatriate's family have on the success or failure of the overseas posting?**
- 4. What factors relate to the repatriation process and career planning?**
- 5. How do responses on expatriate recruitment, management, and repatriation differ across the target countries?**

Each of the first four questions will be examined in this review by investigating the extant literature to determine the current state of knowledge with regard to these issues. Following this investigation, the next step will be to identify and address evident gaps in the research literature and to attempt, subsequently, to fill these gaps by fieldwork, research, and analysis of the collected data and establishing of recommendations.

In the case of question five, an appropriate answer will be determined in Chapter Five as a result of examining the data from interviews and responses.

2.2. Factors in Expatriate Selection

D'Netto and Sagiadellis (1997) suggest there is a consistent neglect of important selection criteria that would assist in the successful choice of staff for overseas assignments; for example, the ability of the spouse and family members to adjust and to cope with culture shock. Not only should the expatriate's personal qualities be considered, but so too should the personal qualities of other family members. The nature of the assignment, the role of the expatriate, perceived career opportunities and pre-departure training are important organisational issues to consider in order to achieve expatriate success.

D'Netto and Sagiadellis (1997) consider that three factors exert a strong influence on an expatriate being successful in an overseas assignment. These are first, the perceived career opportunities; second, willingness and motivation to relocate; and third, the nature of the assignment. In the latest case, the role of the expatriate can change dramatically depending, for example, whether management talent is to be used in solving staff shortages or in exerting control in overseas subsidiaries.

Mendenhall, Dunbar, and Oddou (1987) argue that given the barrier of cross-cultural obstacles that every expatriate must confront, it is not surprising that many expatriates fail to complete the full term of their overseas assignment although estimates of the number of aborted overseas assignments vary considerably, since it is difficult to get such data from international and multinational corporations. Tung (1981;1997), Copeland and Griggs (1998), and Ashamalla and Cocitto (1997) estimate that between 10

and 30 percent of personnel sent abroad return prematurely from their overseas assignment. The financial costs of such premature returns are significant, and Swaak (1995) notes that senior management in some American organisations estimate that when unrealised business is added, losses total close to a quarter of a million dollars per expatriate failure. It is estimated that American companies are losing US\$2 billion a year in direct costs on expatriate failures, this is not taking into consideration the figure for costs of lost business and damaged company reputation caused by these expatriates.

2.3. Cultural and Task Performance

In addressing the question of 'what selection factors do organisations use in making expatriate position choices', Briscoe (1995), Deresky (2000) and Rodrigues (1997) all note that a key aspect of creating successful expatriate experiences is the extent of training and preparation that expatriates and their families receive prior to, and during, their stay overseas. As Briscoe (1995) points out in terms of the parent company, it is important for the performance of expatriates in their foreign assignments that they be seen as able to perform the specific tasks to which they will be assigned as well as to perform well in a different cultural environment. Rodrigues (1997) confirms this view and asserts that cultural and task performance are both important; it is not just a case of one issue or the other. Thus, the first consideration in the process of identifying individuals for overseas assignment should be for firms to fully understand the requirements of those overseas assignments in both technical and cultural terms.

Briscoe and Gazda (1989) present a logical and relevant breakdown of successful expatriate experiences (see Figure 4), which illustrates the importance of both cultural and technical processes. In their view a thorough job analysis, including an examination of the work environment, is essential in order to make correct expatriate selection decisions.

Figure 4: Breakdown of Successful Expatriate Experiences

Source: Briscoe and Gazda, (1989: 89)

A. Analysis of Job Requirements

Technical requirements
Managerial responsibilities
Cultural requirements-Interaction with local
nationals and local community.

B. Analysis of Country of Assignment

General mores/values
Political/legal/socio-economic situation
Social institutions
Standard of living
Physical environment

C. Evaluation of Candidate

Availability
Job abilities
Personality characteristics
Career status
Desire for assignment
Family situation
Gender
Language skills
Prior experiences

D. Preparation of Candidate/Family

Pre-assignment site visit
Job/country orientation
Culture orientation
Language training
Compensation/benefits/taxes/housing counselling
Counselling be repatriate(s)
Local sponsorship

E. Adequate Length of Assignment

F. Repatriation Preparation

Sponsor "back home"
Career counselling
Culture re-orientation

G. Successful Expatriate Experience

2.4. Avoiding the Costs of Failure

Holt (1998) points out that in order to avoid financial and emotional costs associated with the early return of an expatriate manager, some multinational companies implement specific training programs within their human resource management departments. This is done by convening foreign advisory boards and making these boards responsible for developing job criteria and requisite characteristics for successful candidates. For example, a candidate may visit the host country and meet with an advisory committee or work on a brief project to give the employee and the company an indication of the employee's potential fit for a larger assignment. Site visits and collaborative interactions between company executives and host country representatives are common practices of leading companies wanting to establish successful job design and personnel assessment programmes.

Swaak (1995) explains that, as a matter of policy, both Xerox and Philip Morris require site visits and joint evaluations by foreign advisory committees for all senior managers and employees on long-term assignment. Allied Signal Corporation works through a system of regional human resource coordinators to write job descriptions and coordinate selection criteria at the host country level. Ford relies on international human resource teams that include local and regional managers to conduct personnel assessments for management vacancies. According to Copeland (1995) and Hiltrop et al. (1995), European and British companies such as ABB, British Petroleum, Unilever, Volkswagen, and Bayer AG operate regional assessment centres staffed by selection committees, which evaluate all international appointments. These companies invest substantial

resources in the selection process which, as Holt (1998: 575) says, “*is far better use of the funds than wasting them cleaning up after failed assignments*”.

Despite the existence of such programmes, the problems of expatriate failure and premature return continue to confront organisations. Perhaps this suggests that the programmes are not effectively fulfilling the mission of the organisation, because they are not being used frequently enough or because they are of poor quality or that committees may not be appropriately staffed.

In addition, overseas assignments may be much more difficult than imagined and selection alone is not necessarily a good indicator of success.

2.5. Technical Competence Versus Cross-Cultural Skills

Both D’Netto and Sagiadellis (1997) and Stone (1990) contend that, despite the evidence that many other factors influence expatriate success, most organisations seem to focus their selection efforts on one single criterion, which is that of ‘technical competence’. This unidimensional approach to expatriate selection is perhaps explained in a statement by a respondent in Baker and Ivancevich’s (1971: 44) study, in which it was suggested that, “*Managing a company is a scientific art. The executive accomplishing the task in New York can surely perform as adequately in Hong Kong*”.

This ethnocentric and narrow focus on the selection process of multinational organisations has been noted by several researchers; e.g. Baker and Ivancevich (1971),

Miller (1971), Hayes (1974), and Tung (1981) (1987) all of whom have called for more comprehensive selection procedures for the staffing of overseas assignments. Tung (1981) found that only five per cent of the companies in her sample administered tests to determine the degree to which candidates possessed cross-cultural skills. Tung (1981) concluded the study by suggesting that it was surprising that an overwhelming majority of the firms surveyed had failed to assess the candidate's relational abilities when it was clearly recognised that relational abilities are important for overseas work. In addition, because research has shown relational abilities to be crucial to success in overseas assignments and, given the increasing demand for personnel who could function effectively abroad and the relatively high incidence of 'failure', there certainly appears to be room for improvement in this area.

To assess what factors are important in choosing managers for overseas assignments, Stone (1990) asked managers to rank ten criteria that could be used in expatriate selection. The selection criteria were derived from lists developed by Tung (1982) and the Business International Corporation (Robinson, 1978). The criteria were ranked in importance by Australian managers responsible for the selection of expatriate from Australia, expatriate managers themselves resident overseas, and Asian managers, who select personnel for overseas assignments out of Hong Kong, Singapore, Thailand, Indonesia, and the Philippines.

Table 1: Ranking of Expatriate Selection Criteria
Source: Stone (1990: 4)

		Australian Managers N=47	Expatriate Managers N=52	Asian Managers N=15
1.	Ability to adapt	1	1	2
2.	Technical Competence	2	3	1
3.	Spouse and family adaptable	3	2	4
4.	Human Relations Skill	4	4	3
5.	Desire to serve overseas	5	5	5
6.	Previous overseas experience	6	7	7
7.	Understanding of host country culture	7	6	6
8.	Academic qualifications	8	8	8
9.	Knowledge of language of country	9	9	9
10.	Understanding of home country culture	10	10	10

Appendix 1 gives a description of respondents to the question.

The technical competence factor was placed highly on the selection agenda by all groups; being ranked 'one' by Asian managers. In addition to technical competence, Australian managers and expatriates ranked the expatriate's ability to adapt and the adaptability of the spouse and family as major selection factors.

In a survey conducted by Brewster (1988) within multinationals in the United Kingdom, France and Holland, and an earlier one by Tung (1982) within companies of the United States, technical know-how ranked, in terms of company practice, as the most important selection factor.

2.6. Causes of Expatriate Failure

When expatriate failure is examined, respondents to several surveys, viz. those conducted by Briscoe (1995), Stone (1990), Zelva and Banai (1984), Rahim (1983), and Tung (1982) reported that the manager's inability to adapt and the spouse's inability to adapt are the principal two reasons for failure (see Table 2 below).

Table 2: The Causes of Expatriate Failure
Source: Stone, (1990: 4)

		Australian Managers N=47	Expatriate Managers N=52	Asian Managers N=15	US Managers *
1.	Manager's inability to adapt	1	1	1	2
2.	Spouse's inability to adapt	2	2	2	1
3.	Inability to cope with larger responsibilities	3	4	6	5
4.	Other family-related problems	4	5	5	3
5.	Manager's personality	5	3	3	4
6.	Lack of motivation to work overseas	6	7	4	7
7.	Lack of technical expertise	7	6	7	6
8.	Other	8	8	8	8

Expatriate failure will be dealt with more fully later in this review, but attention is now drawn to issues associated specifically with the spouse and family.

2.7. Spouse and Family Considerations

In addition to basing choices for overseas assignment on a clear understanding of the technical and cultural requirements of the foreign job, Solomon (1994), Abraham (1998), and Deresky (2000) agree that international and multinational organisations should base their expatriate choices on several personal and family considerations. In fact, a number of companies are beginning to recognise the importance of providing support for spouses

and children, particularly where both partners are career-oriented and demand that both sets of needs be included at the bargaining table. According to Deresky (2000) many companies are now using informal means, such as inter-company networking, to help find the spouse a position in the same location. They know that, with the increasing number of dual career couples, if the spouse does not find a position, the prospective candidate may well decline the assignment. Pascoe (1992) makes a relevant observation about the multinational corporation Procter and Gamble where employees and spouses destined for China are sent to Beijing for two months of language training and cultural familiarisation. The Japanese Trading House of Nissho Iwai gets the manager and spouse who are leaving Japan to meet with foreign partners who are on their way there. In addition, this organisation provides a year of language training and information and services to assist Japanese children to attend schools abroad. These support services provide timely help for the manager and, therefore, are part of the effective management of an overseas assignment.

If there is one factor about expatriate selection on which the literature is unequivocal it is that the process of selection of personnel for an overseas assignment is complex. As stated earlier, too often overlooked in the selection process is the need to ascertain whether potential expatriates have the necessary cross-cultural awareness and interpersonal skills for the position (Abraham, 1998; Solomon, 1994; and Stone, 1990). Similarly, the other important variable often given insufficient attention in the selection process is that of the suitability and adjustment of the spouse or partner.

2.8. Instruments Used in Training Expatriates

The training of expatriates for overseas postings is very much a logical progression from a sound initial selection process.

As discussed earlier in this paper, a principal reason for expatriate failure in many multinational corporations is the lack of relational abilities; i.e. a lack of interpersonal communication skills. This point is made clear by Rodrigues (1997), Deresky (1997), Odenwald (1994), Stone (1990), and Tung (1981), all of whom emphasise that relational skills are crucial to success in overseas assignments. As Odenwald (1994) contends, also, offering a few cultural courses for expatriates is merely a bandaid approach to cross-cultural training. The training strategy must align itself with the company's global corporate strategy and while training can supply the motivation, knowledge and skills needed for improvement, it cannot be effective unless what is learned is consistent with the overseas management practices.

A relevant case study based on the multinational corporation Intel is cited by Odenwald (1994). Intel Corporation is one company whose global training strategy reflects its overall strategy. As Intel is engaged in a number of multinational partnerships, one of its major thrusts has been to increase the quality of relationships and the exchange of information and training technology. Intel crafted a cross-cultural training, global training and in-house program that supported its corporate plan. Once a year, a week-long international training summit meeting is held for the purpose of deciding on a corporate-wide training strategy for the year, as well as to promote communications and

relationships among the training organisations of the world. Intel's intercultural training program covers intercultural awareness, a multicultural integration program, culture specific training, and training for international assignments.

A major trend that Intel has noticed is the increased level of intercultural awareness among its participating managers, and their growing willingness and commitment to overseas assignments; even to training for overseas assignments. This is in contrast to many multinational corporations whose executives shy away from overseas assignments, preferring the safer path to career advancement by staying at the home base (Rodrigues, 1997). Intel is a good example of a firm that operates in the international arena, which is prepared to confront a number of special problems related to the training and development of workforces and managers.

2.9. Cross-Cultural Preparation

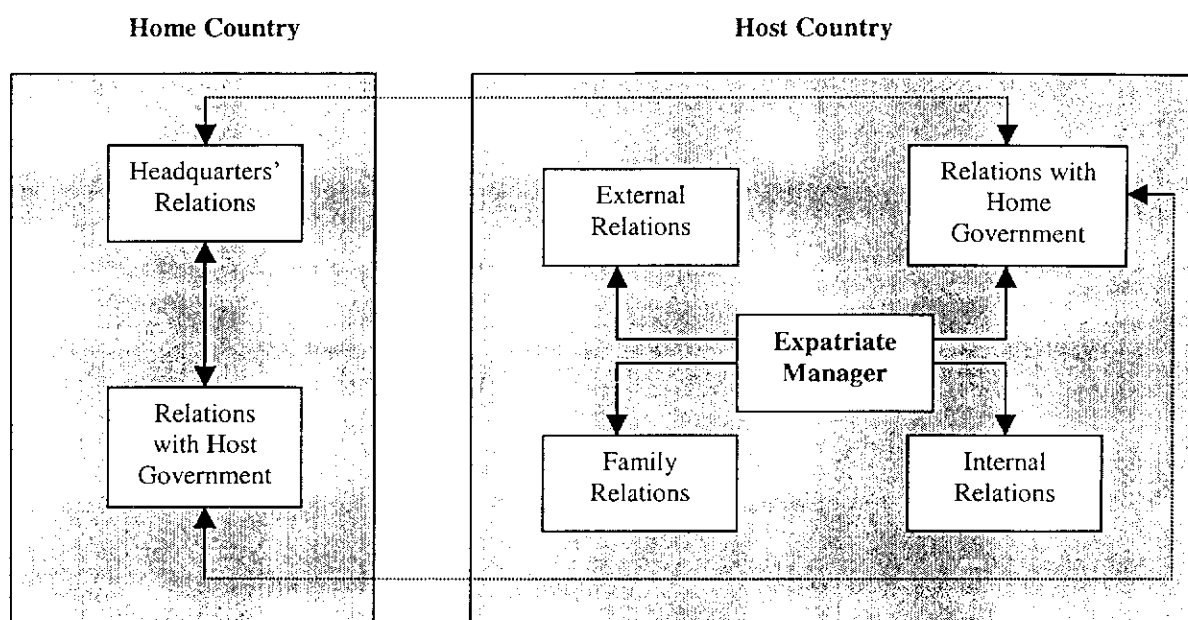
The cross-cultural literature suggests that many international and multinational organisations could learn from Intel's global training strategies. As Briscoe (1995) explains, the preparation of expatriates prior to going overseas is at least as important as selecting the right candidate and family in the first place. There is ample evidence (Stone, 1990) to suggest that multinational corporations do not do a very thorough job of this and yet the inability to adjust in one form or another, which can often be improved through training and orientation, is generally the reason for failure in an overseas assignment.

According to Maman (1995) too much emphasis is placed on the technical abilities of executives and too little on their cultural skills and family situation. These factors were highlighted earlier by reference to research by D'Netto and Sagiadellis (1997) and Stone (1990). Blocklyn (1989: 12) quoted Herod, Vice-President of International Human Resources at Campbell Soup Company, as saying that "*when international executive relocations fail, they generally fail either because expatriates cannot fathom the customs of the new country or because their families cannot deal with the emotional stress that accompanies relocation*". In both cases, orientation to the culture shock they will experience in their new environment seems particularly important.

Foxman and Polsky (1991) confirm the importance of cross-cultural preparation. Their significant research shows that experienced international human resource managers think cross-culture preparation is absolutely necessary for expatriate success in foreign assignments to give the candidate and his/her family adequate and accurate information about the assignment and location. Equipped with this knowledge they will be able to make informed decisions about the desirability of such an assignment. Briscoe (1995) confirms this by arguing that both the employee and spouse should be well briefed on the new assignment's responsibilities as well as the firm's policies regarding expatriate compensation, benefits, taxes, security procedures and repatriation. Caudron (1992) and Black, Gregersen and Mendenhall (1992) agree and emphasise that the employee and family need to be provided with all the information, skills and attitudes which they will need to be comfortable, effective and productive on the overseas assignment. Much of this orientation and training must be focussed on the cultural values and norms of the new country.

Rahim (1983) produced two models of programme outlines that could be used to develop key expatriate executives; these are still relevant to training of expatriates today. The first of these two models is shown as Figure 5.

Figure 5: Categories of Expatriate Manager Relations
Source: Rahim, (1983: 313)



The model in Figure 5 illustrates how the demands on expatriate managers are as much a result of the multiple relationships that they have to maintain as they are of the differences in the host country environment. The model depicts those demands and it is interesting to note the inclusion of family relations. Deresky (1997) confirms Rahim's findings by making the point that any potential problems identified by the expatriate should be addressed during pre-departure training.

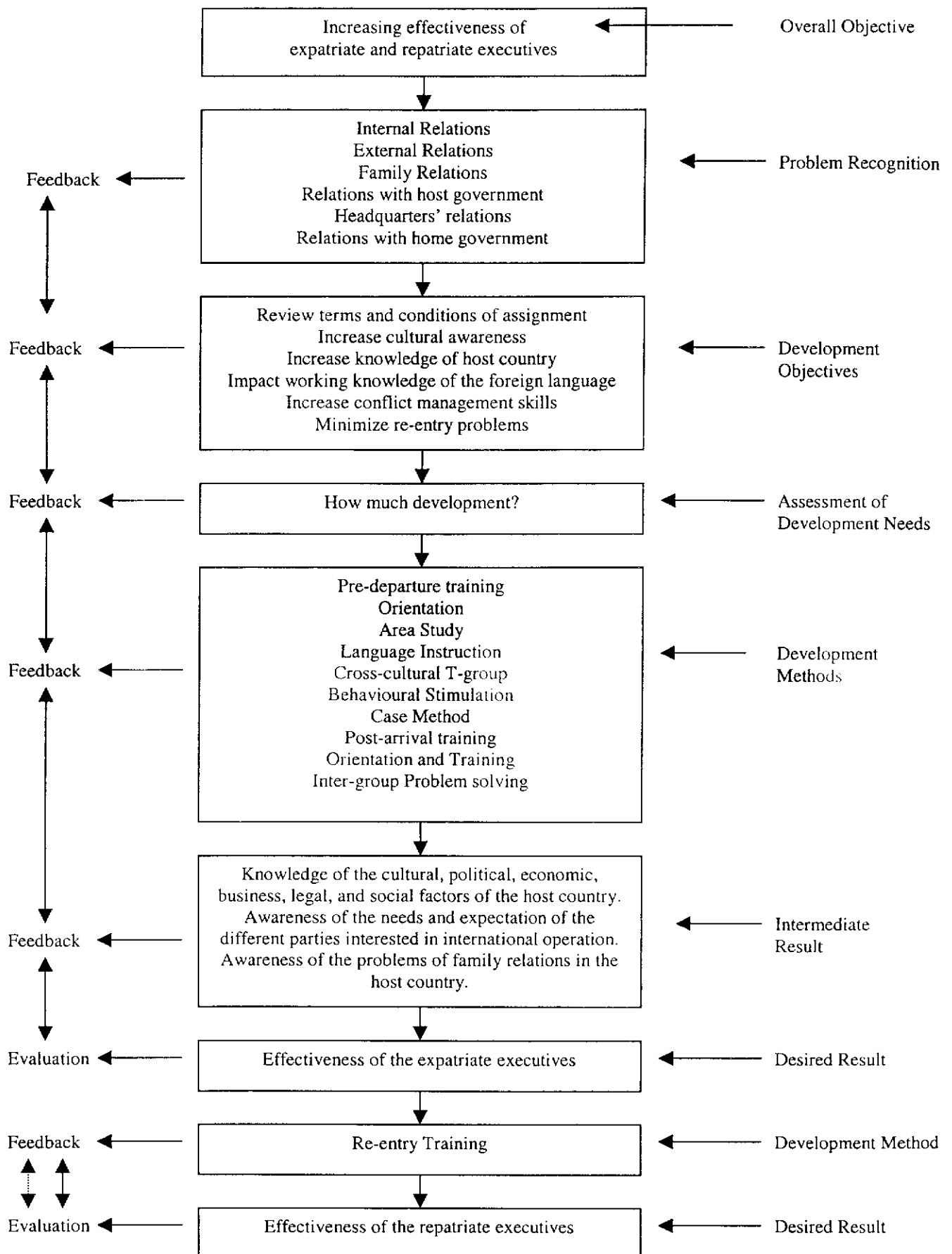
Problem recognition is also the first stage in the comprehensive plan by Rahim for developing expatriates, as shown in his second model entitled 'A Model for Developing Key Expatriate Executives'. This second Rahim model (Figure 6) shows various development methods that are used to address three areas critical to pre-departure; viz.

cultural training, language instruction, and life-style/communication adjustment. According to Mendenhall (1990), these are factors needing to be addressed during pre-departure training, post-arrival training and re-entry training.

Two-way feedback between the executive and the trainers at each stage is an interactive process that helps to tailor the level and kinds of training to the needs of the individual manager. The desired goal is to increase the effectiveness of the expatriate as a result of familiarity with local conditions, cultural awareness, and an appreciation of his or her family's needs in the host country.

Figure 6: A Model for Developing Key Expatriate Executives

Source: Rahim (1983: 312-317)



2.10. Matching Cross-Cultural Training to Personal Needs

Researchers such as Briscoe (1995), Mendenhall (1992), and Ronen (1989) similarly suggest that cross-cultural training ought to be matched to the nature of the particular need. They explain that, as the differences between the culture of the expatriate (and the expatriate's family) become greater when compared to that of the new overseas assignment, the length and depth of the training should become greater.

Table 3, Ronen's (1989) model entitled 'Training the International Assignee' is a useful instrument in the literature because it illustrates the matching of training methods with learning techniques suited to the training of expatriates.

Table 3: Training the International Assignee
Source: Ronen (1989, in Goldstein and Associates, 1989)

METHOD	TECHNIQUE	PURPOSE
Didactic-Informational Training	Lectures Reading Material Video Tapes Movies	Area studies, company operation, parent-country institutions
Intercultural Experiential Workshops	Cultural assimilators Simulations Role playing	Culture-general, culture-specific negotiation skills; reduce ethnocentrism
Sensitivity Training	Communication Workshops T groups Outward-bound trips	Self-awareness, communication style, empathy, listening skills, nonjudgmentalism
Field experiences	Meeting with experts on country Host family surrogate	Customs, values, beliefs, non-verbal behavior, religion
Language skills	Classes Cassettes	Interpersonal communication, job requirements, survival necessities

Blocklyn (1989, as quoted by Briscoe, 1995, pp. 14,89) advocates that, at the very least, training, and orientation on the following topics should be provided to allow for easier transition into the new culture:

- Intercultural business skills (e.g., negotiation styles in different countries and cultures);
- Culture shock management (e.g., what to expect and how to deal with the stress of adaptation);
- Life-style adjustment (e.g., how to deal with different shopping and transportation systems and the differing availability of familiar foods and entertainment);
- Host-country daily living issues (e.g., any unfamiliar problems with water or electricity);
- Local customs and etiquette (e.g., what to wear and different behavior patterns for men and women);
- Area studies (e.g., the political and religious environment);
- Repatriation planning (e.g., how to stay in touch with the home office and how to identify an appropriate assignment prior to repatriating back home); and
- Language learning strategies, both before leaving for the new assignment as well as after arrival.

2.11. Importance of Counselling and Training

In the broader picture, Schell and Stoltz-Loike (1994) explain that many organisations divide their preparation of expatriates into the two categories of counselling and training: the counselling category deals primarily with the mechanics of a move abroad; the training component attempts to develop skills in national and cultural issues that will enable the expatriate and family to better adapt to the new situation. Schell and Stoltz-Loike (1994) point out that, increasingly, multinationals are realising how important such preparation is to the international business success of their expatriates.

Briscoe (1995) uses the Swiss-based international pharmaceutical company CIBA-GEIGY as a good example of this type of preparation. The types of topics covered by

their counselling and training sessions include 'counselling' on salary and benefits, language training, family adjustment, schooling, housing and shipping of household goods; 'training' includes sessions on cultural sensitivity, local customs and laws, security, attitudes and country background briefing.

However, examination of the literature reveals that the importance given to expatriate preparation and pre-departure training by CIBA-CEIGY and other large firms is very much the exception rather than the rule. Holt (1998), D'Netto and Sagiadellis (1997) and Rodrigues (1997) confirm that pre-departure training of expatriates appears quite superficial in the majority of multinationals and virtually nonexistent in others. This situation has not changed greatly since previous research conducted by Tung (1982), Harvey (1985) and Oddou and Mendenhall (1991) which revealed that only about a third of North American companies offer any pre-departure cross-cultural or language training. Statistics on pre-departure training, described by Holt (1998), might be summarised as a 'story of halves'. Less than half of the multinationals studied offer any form of pre-departure training. Only about half offer more than one week of general orientation and of those, less than half include family members. Based on previous research undertaken by Dunbar, Oddou, and Mendenhall (1992), Holt (1998) argues that less than 14 percent of Western organisations provide cross-cultural training sessions of which approximately only five percent provide pre-departure support for families.

Most training focuses on technical issues related to the job, along with an introduction, when required, to the language of the country (Rubio, 1998). Therefore, it is legitimate to ask why companies do not invest more in expatriate training

programs. Mendenhall, Dunbar and Oddou (1997) have a set of findings relevant to this question (see Figure 7).

Figure 7: Primary Reasons Companies Do Not Invest in Expatriate Training Programs
Source: Mendenhall, Dunbar and Oddou (1987)

• Top management perceives no need for expatriate training
• Cross-cultural training programs have not demonstrated effectiveness, and no evidence indicates substantial benefits to trainees or companies.
• Training is not a cost-effective investment; temporary short-term assignments (those lasting one to three years) do not warrant training expenditures.
• Selection leaves too little time before relocation to new assignments to allow in depth, cross-cultural training for expatriates.
• Companies prefer to hire locally, creating a trend toward assigning fewer expatriates overseas and weakening the need for expensive training programs.
• Employees feel dissatisfied with training programs and see little value in lengthy or intensive sessions beyond orientation programs.

Given the high rate of expatriate failure and its consequent costs, the lack of company investment in expatriate training is difficult to understand. Holt's (1998) view is that if top management is not convinced of the cost-effectiveness of pre-departure training, estimated costs attributed to failures which can total close to a quarter of a million US dollars per expatriate failure should be sufficient to convince them otherwise.

Fukuda and Chu (1994) believe that if results achieved by Japanese multinationals represent valid comparisons, then in-depth, cross-cultural training is an extremely effective expenditure. Several major studies of Japanese companies by these researchers show that approximately 80 percent operate formal, pre-departure, acculturation training programs and experience extremely low failure rates, perhaps no more than five percent.

Research literature (Anderson 1999; Forster 1997; Tung 1984; Sullivan 1983;) indicates that the criterion most often used in selecting employees for overseas assignments is technical competence; however, it is unlikely that expatriate failure could be attributed solely to lack of technical competencies given the need for technical competence to perform well in order to be selected for a position. Rather, the literature reveals that expatriate assignments would have a much higher success rate if attention were given to pre-departure training in relational abilities, acculturation, cross-cultural training, counselling and attention to spouse and family adaptability. The contrary case is that expatriate failure is much more likely to occur where there is a lack of training in these aspects.

2.12. Repatriation and Career Pathing

Factors relating to the repatriation process and career pathing are as important to the expatriate process as are initial selection and pre-assignment training of the expatriate. Deresky (1997) points out that effective human resources management of a company's cadre does not end with the overseas assignment; it ends with the successful repatriation of the executive into company headquarters. When organisations do not take care of expatriates upon re-entry, few good managers will be willing to take international assignments because they see what happened on the return of their colleagues. A review of the literature on repatriation and career pathing reveals a host of potential problems that await the expatriate when he or she returns and these explain the high turnover rate among expatriates after they return home. Tung (1998) comments on earlier research by Black, Gregersen and Mendenhall (1992) which shows that approximately 20 percent of repatriates leave their companies within one

year of return from an international assignment. This may stem, in part, from their frustration at not being able to utilise the skills and experiences they developed while abroad.

The literature also reveals steps taken by an increasing number of organisations to retrain staff after their overseas assignment by putting into place judicious succession plans. Monsanto, the pharmaceutical giant, started a repatriation program in 1992, which has successfully improved the adjustment and performance of repatriates. McFarlin and Sweeney (1998) highlight specific problems that expatriates experience on their return, such as the numerous changes in the organisation, the country, the living conditions, the nature of the job whether it be promotion, demotion, or not being on a particular career path, in addition to changes in the expatriate's values and attitudes after several years abroad. These problems make returning seem like a foreign assignment in itself. McFarlin and Sweeney (1998) further noted that multinational organisations are waking up to the realisation that neglecting repatriation is a very costly business, not only in monetary terms but in terms of loss of repatriates.

Solomon (1995) highlights how repatriation causes international human resource managers to face one of the most complex sets of issues facing managers today. In an ideal situation, the employee should reap career and personal payoffs from the overseas experience; in turn, the company should enjoy benefits from the additional competencies developed by the repatriated employee. Further, research by Frazee (1997) reported statistics that show repatriated managers in Western multinational organisations leave their companies at twice the rate of domestic managers without

international experience. The study suggests that 20 percent of repatriate managers leave their companies within one year of return and as many as 50 percent leave within the first three years. These rates indicate a serious repatriation problem exists as employers lose the investment that they have made by sending an employee overseas. As Frazee (1997: 25) says, "*It is impossible to know the opportunity cost to these organisations of losing their repatriates' global experience.*"

Both Solomon (1995) and Frazee (1997) suggest sending the message that the organisation is investing in the employee; that the company wants a return on the investment and expects the acquisition of knowledge while overseas on the assignment and transference of that knowledge when the expatriate comes home. Creating a repatriation and career path agreement outlining the expectations of each party including placement following repatriation, compensation, transportation, in-country support for family and other issues is further discussed by Frazee (1997), who describes a number of American and other Western organisations who conduct this procedure to protect their investment. Research by Shilling (1993) and Solomon (1995) shows a comprehensive step-by-step repatriation and career path process including relevant time frames and description (Table 4). This is a valuable model for developing a comprehensive repatriation process.

Table 4: Steps for Improving the Repatriation Process
Source: Shilling (1993: 40-46) & Solomon (1995: 28-37)

TIME FRAME	STEPS/DESCRIPTION
Before departure	Clearly communicate re-entry job options. Establish career development plan. Appoint home and host country mentors to support expatriate. Arrange home visit for visibility.
Six to nine months before return	Narrow list of re-entry job options. Send expatriate job openings/listings. Ask expatriate to polish resume. Conduct home office visits to facilitate adjustment, schedule job interviews.
Three to six month before return	Conduct briefings with employee and family about what they've learned. Brief employee and family on changes in the country that may impact their return. Ask employee to list personal/professional expectations about the return to minimise, misunderstandings and correct assumptions. Explain firm's moving policies and repatriation programs - especially those dealing with financial issues.
Immediately upon return home	Assign employee and family to a welcome home group consisting of former expatriates. Match employee with a home sponsor who will cover changes in company structure, policy, technology, or product/services. Provide returning spouse with career-related assistance (e.g., job hunting). Offer counselling for more serious problems. Show that the firm cares about overseas experiences.
Three to six month after returning	Provide training that discusses re-entry shock, pace of adjustment, feelings. Assess how employee's new skills and experience can be better used by the firm (ask employee for suggestions). Reassess adjustment process to identify outstanding problems and offer assistance

While there has been a multitude of explanations advanced for the high failure rate of expatriates, e.g., inadequate training and preparation, central office/overseas office conflicts, inadequate selection criteria and repatriation issues, none may be more significant than is the impact of the spouse/family on the expatriate manager.

Research by Stone (1990), Tung (1982 & 1998), Mendenhall (1992), and Harvey (1985) reveals that the principal difficulty faced by most expatriates lies in the inability of the Manager and/or the wider family to adapt to the foreign culture.

As Briscoe (1995: 53) comments, *“the firm must select managers who, with their families will be most able to adapt overseas and who also possess the necessary expertise to get the job done in that foreign environment”*. Many firms that lack experience in international operations overlook the importance of the cultural variations in other countries. Holt (1998) has argued that many recalls result when expatriates cannot adapt to living in their host countries or when family members cannot make the necessary transitions, and that the true reasons for failure often trace back to inept company practices and poor preparation for expatriates themselves and for their accompanying family members.

Tung (1981, 1984, 1987, 1988) is one of very few researchers to date who has undertaken broad based empirical research on expatriate management. In a sample of eighty American, twenty-nine West European and thirty-five Japanese multinational companies with subsidiaries in Western Europe, Canada, Middle East, Eastern Europe, Latin, South America, Far East, Africa, and the United States, she conducted survey research on the following subjects:

- Selection criteria for overseas assignments
- Procedures used to determine the suitability of a prospective expatriate for a foreign position
- The type and extent of pre-departure training, and
- The success rate and the reasons for success of overseas postings.

As part of the research, the respondents were asked to indicate what percentage of expatriates did not complete the agreed time arrangements of their assignment. Table 5 summarises return/recall rates in American, European, and Japanese companies.

Table 5: Return/Recall Rates of Selected Companies

Source: Tung, R.L. (1988: 47) The New Expatriates: Managing Human Resources Abroad, Cambridge USA, Ballinger.

Return/Recall %	% of Companies
USA multinationals	
20-40	7
10-20	69
< 10	24
European multinationals	
11-15	3
6-10	38
< 6	59
Japanese multinationals	
11-19	14
6-10	10
< 6	76

The return/recall rate of American multinationals is considerably higher than that of their European and Japanese counterparts. While 76% of the US multinationals in Tung's study has recall rates above 10%, this applies to only 3% and 14% of the European and Japanese multinationals. The Japanese included the highest percentage of companies with recall rates below 6%.

It can be concluded from the Tung (1988) study that there are, in fact, very few companies with recall rates above 20% as only 7% of the US multinationals fall into this category and there are no European or Japanese firms in this group at all.

In questionnaire surveys by Australian researchers Stone (1993) and Sagiadellis and D'Netto (1997), Stone (1993) found that within sixty multinationals in Australia, New Zealand, and South East Asia, slightly more than half (31) had recall rates of eight to nine percent and four organisations only had recall rates of over 20%. Sagiadellis and D'Netto (1997) found similar figures in Australian organisations involved in expatriate selection and assignment overseas.

These figures are contrary to the high rates (20%-40%) of expatriate failure published by some researchers in the past such as Harvey (1995) Swaak (1995) and Mendenhall, Dunbar and Oddou (1997) and there is ongoing debate led by Hartzing (1995) and Forster (1997) regarding the reliability of these high percentages; however, any expatriate failure in an organisation is an expensive and wasteful exercise and calls for immediate action on the part of the company concerned.

However, Tung and Andersen (1997) and Mendenhall and Oddou (1992) injected a note of optimism into the debate because their research indicated that the rate of failure is declining as more companies develop programs to prepare their expatriates.

Kopp (1994: 590) sheds some light on the nature of problems faced by expatriates, as shown in Table 6. His research reveals interesting statistics regarding failure rates; for American/Canadian expatriates they are estimated at 25-40 percent, whereas studies

of British and European organisations suggest failure rates of three percent for Swedish firms, 14 percent for French firms and ten percent for British multinationals. For recent studies of Japanese firms, failure rates were estimated to be as low as five percent.

Table 6: Incidence of International Personnel Problems
Source: Kopp (1994: 590)

Type of Problem	% Japanese Firms Reporting Problems * (n=34)	% European Firms Reporting Problems (n=23)	% US Firms Reporting Problems (n=24)
Expatriate Related			
Lack of home country personnel who have sufficient international management skills	68 (60)	39	29
Lack of home country personnel who want to work abroad	26(27)	26	13
Expatriates experience reentry difficulties (eg, career disruption) when returning to the home country	24(20)	39	42
<i>Average of expatriate-related problems</i>	39(36)	35	28
Local National Staff Related			
Difficulty in attracting high-caliber local nationals to work for the firm	44(53)	26	21
High turnover of local employees	32(20)	9	4
Friction and poor communication between home-country expatriates and local employees	32(47)	9	13
Complaints by local employees that they are not able to advance in the company	21(20)	4	8
Local legal challenges to the company's personnel policies	0(0)	0	8
<i>Average of local national staff-related problems</i>	26(28)	10	11

*Researchers draw a sub sample of Japanese respondents to validate results of the primary sample with compared results in parentheses.

2.13. Factors Relating to Expatriate Failure

The present review of literature has identified many factors that can relate to expatriate failure, such as the inability to adapt, lack of technical expertise, spouse and family inability to adapt to a new country and culture and there are many others. By the same token, the literature suggests a range of remedial strategies that can be used to overcome the possibility of expatriate failure depending on the overseas assignment and the circumstances of the situation.

Over the past decade well known researchers in the field of expatriate management, Black and Gregersen (1999), have argued that the main reason companies get it so wrong is that many senior executives assume that the rules of good business are the same everywhere. In other words, they do not believe they need, or should have, to engage in special efforts for their people overseas. For example, executives know that negotiation skills and marketing strategies can vary from culture to culture; however, most are not convinced that the differences are so great as to warrant expensive programs designed to select or train candidates for international assignments. In addition, once their people are in place overseas, executives in the home office usually are not inclined to coddle their well-paid representatives.

Of the small, but growing number of organisations that do engage in serious efforts to make foreign assignments beneficial both for employees and employers, Black and Gregersen (1999) found that they all follow three general practices, which are summarised below:

Firstly, people are given foreign posts for two related reasons; viz., to generate and transfer knowledge and to develop their global leadership skills. The overseas expatriate would be expected to transfer his or her knowledge to local professionals and to learn from them as well. Together they would be expected to generate innovative ideas.

Secondly, successful organisations assign overseas posts to people whose technical skills are matched or exceeded by their cross-cultural abilities. These organisations do not assume that people who have succeeded at home will repeat that success abroad. They choose individuals who not only have the technical ability but who have indicated that they would be likely to succeed in living in a different culture.

Thirdly, successful companies end expatriate assignments with a carefully thought out and deliberately planned repatriation process. Companies that recognise that repatriation is a time of major upheaval professionally as well as personally, assist their returning people with career guidance so that their international experiences can be put to work beneficially.

Companies like GE, Shell, Unilever, Colgate-Palmolive, Honda, and Nokia who follow these practices appear to share a conviction that sustained growth rests on the shoulders of individuals with international experiences. As a result, they are poised to capture tomorrow's global market opportunities by making their investments in international assignments successful today.

Well known researchers in the field of human resource selection and expatriate success, Black, Mendenhall and Oddou (1991) have developed a model that helps to explain the factors involved in effectively adjusting to overseas assignments. This is an interesting and informative model to consider in investigating expatriate management prior to and during the assignment overseas. It helps to identify the theoretical underpinnings of effective selection of expatriates as shown in Figure 8.

Figure 8: Towards A Comprehensive Model of International Adjustment: An Integration of Multiple Theoretic Perspectives
Source Black, Mendenhall and Oddou: 1991)

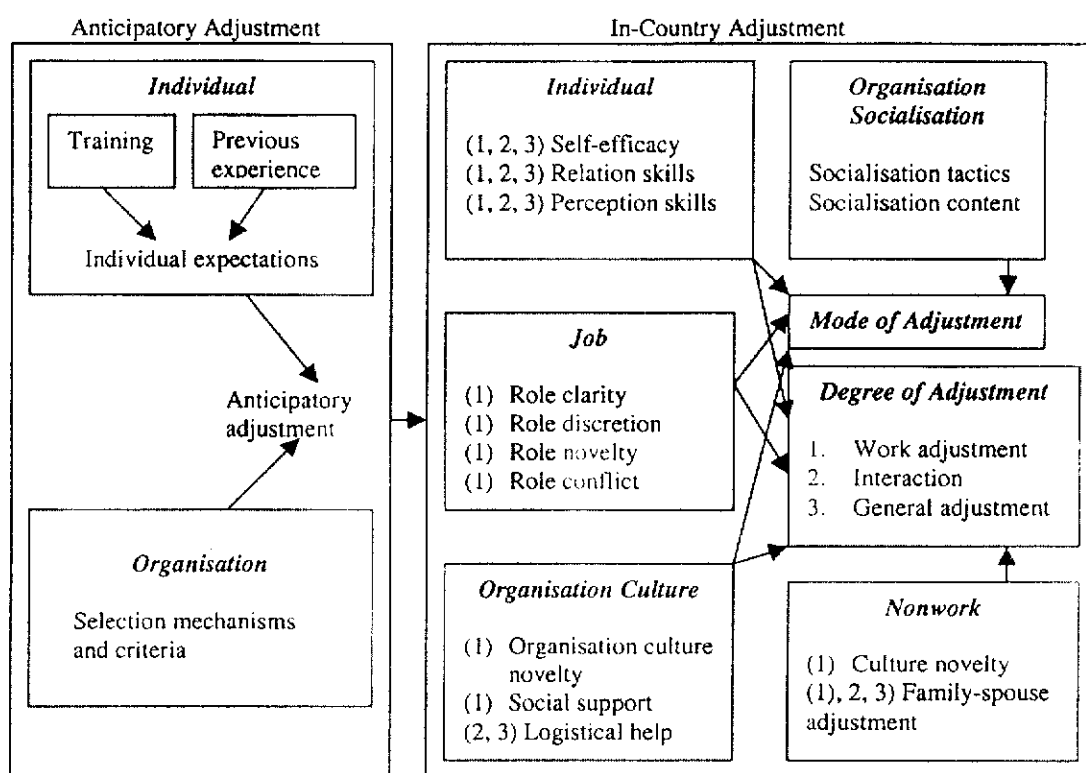


Figure 8 relates to this literature review and, as shown above, consists of two major types of adjustment that an expatriate must make when going on an overseas assignment. The first is the anticipatory adjustment, which is carried out before he or she leaves for the assignment. The second is the in-country adjustment, which takes place on-site overseas. The anticipatory adjustment is influenced by a number of important factors. One individual factor is the pre-departure training that is provided;

this often takes the form of cross-cultural seminars or workshops and is designed to acquaint expatriates with the culture and work life of the country to which they will be posted. The literature review addresses the importance of training early in the chapter by quoting authorities such as Briscoe (1995), Deresky (1997), and Rodrigues (1997) all of whom concur that 'a key aspect of creating successful expatriate experiences is the extent of training and preparation that expatriates and their families receive prior to, and during their stay overseas'.

In Figure 4 above, Briscoe and Gazda (1989) exhibit a breakdown of successful expatriate experiences showing the importance of training and preparation of the candidate and family by pre-assignment site visits, culture orientation, language training, counselling by repatriate and local sponsorship. Another individual factor affecting anticipatory adjustment is the previous experience the person may have had with the assigned country or those with similar cultures; Figures 4 and 5 of the literature review emphasise this criterion. These two individual factors, training and previous experience help to determine the accuracy of the expatriate's expectations.

The organisational input into anticipatory adjustment is most directly related and concerned with the selection process and again the literature review refers to Black, Mendenhall and Oddou's (1991) model. For instance, D'Netto and Sagiadelis (1997) suggest that there is a consistent neglect of important selection criteria that would assist in the successful choice of staff for overseas assignments and argue that the nature of the assignment, the role of the expatriate, perceived career opportunities and pre-departure training are important organisational issues to consider in the selection process of candidates if companies are to improve expatriate success. Selection

mechanisms that organisations might undertake to avoid financial and emotional costs associated with the early return of an expatriate manager are, as Holt (1998) suggests, on-site visits overseas and collaborative interactions between company executives and host country representatives.

Turning now to in-country adjustment, once the expatriate is on site a number of factors will influence his or her ability to adjust effectively. One factor includes the person's ability to maintain a positive outlook in the face of a high-pressure situation, to interact well with host nationals and to perceive and evaluate the host country's cultural values and norms correctly.

The review presents above, in section 2.3, Figure 4 a relevant breakdown of successful expatriate experiences which illustrates the importance of an analysis of the country. This includes the general mores and values, social institutions, standard of living and socio-economic, political and legal situation of the country of assignment.

Other factors relevant to in-country adjustment are the job itself as reflected by the clarity of the role the person plays in the host management team, the authority the person has to make decisions, the newness of the work-related challenges and the amount of role conflict that exists. The culture of the organisation and how easily the expatriate can adjust to this are additional factors which influence the adjustment pattern.

Black and Gregersen (1999) refer to these important issues when they agree that successful organisations give people foreign assignments for two related reasons, firstly to generate and transfer knowledge and secondly to develop their global leadership skills. The overseas expatriate is expected to transfer his or her knowledge to local professionals and to learn from them as well. Together, the expatriate and the professionals are expected to generate innovative ideas.

The final stages of Black, Mendenhall and Oddou's (1991) international adjustment model include non-work factors such as the toughness with which the expatriate faces a whole new cultural experience and how well his or her family adjusts to the region of the new assignment. The final factor is the expatriate's ability to develop effective socialisation tactics and to understand 'what's what' and 'who's who' in the host organisation.

These concluding factors also are aligned to the literature review particularly in Figure 4, which highlights personality characteristics and the family situation during the evaluation of the candidate for an overseas position. Spouse and family considerations should be catered for in overseas postings. Solomon (1998), Abraham (1998) and Deresky (2000) agree that international and multinational organisations should base their expatriate choices on several personal and family considerations such as dual-career situations, assistance with finding a job for the spouse and sound support systems from head office. These anticipatory and in-country factors will influence the expatriates mode and degree of adjustment to an overseas assignment. As identified in the model in Figure 8, these factors cover a wide continuum of

considerations. They can help to explain why effective expatriate management is multifaceted and can be very difficult and challenging.

2.14. Summary

Four questions were identified at the beginning of this review as central to the present study and an attempt has been made to locate existing research information relevant to the questions. The questions were:

1. What factors do organisations use in making expatriate selection?

Evidence noted indicates that there are a number of different criteria used in making expatriate selection, yet the literature reveals also that many organisations are not addressing the selection process or the expatriate's ability to adapt to the foreign culture in a methodical manner likely to overcome the problems of failure or early recall in overseas assignments.

2. What measures do organisations use in the training of expatriates for overseas postings?

The training strategy must align itself with the company's global corporate strategy and while training can supply the motivation, knowledge and skills needed for improvement, it cannot be effective unless what is learned is consistent with overseas management practices.

3. What impact does the expatriate's family have on the success or failure of the overseas posting?

The literature reveals that the partner and family of the expatriate have a clear influence on the decision to accept or reject the overseas assignment and during the period of the posting overseas, the supportive family greatly enhances the

chance of overseas success for the organisation as well as the expatriate. The onus is on senior management to recognise the importance of providing support for the partner in dual-career situations, in the education of children and in keeping open strong communication channels with the home base.

4. What factors relate to the repatriation process and career planning?

The questions posed about factors which relate to the repatriation process and career planning of expatriates are answered by the clearly identified need to put into place judicious succession and repatriation plans. Some organisations have successfully improved the adjustment and performance of returning expatriates by providing formal repatriation programs. However, the literature strongly suggests that there is a clear requirement for multinationals to urgently address the repatriation and career pathing processes.

The research findings of D'Netto and Sagiadellis (1997) are pertinent to this summary. They highlight three factors that exert a strong influence on an expatriate being successful in an overseas assignment: first, the perceived career opportunities; second, willingness, and motivation to relocate; and thirdly the nature of the assignment.

To these can be added a fourth important factor; viz. the ability of the expatriate's family and partner to adapt to the culture of the country and to the environment. Culture orientation and interaction with local nationals and the local community is essential for both the expatriate and their family and makes for a successful expatriate assignment.

Chapter Three, will describe the research design/methodology used to collect and analyse data to investigate further the questions raised in this chapter.

Chapter Three:

Research Design

3.1. Introduction

Chapter Two identified several research questions and the review of the literature established that many organisations are not addressing the selection and training of expatriates to overcome problems of failure in overseas assignments. The literature also revealed that too little attention is given to the expatriate's ability to adapt to the foreign cultures by comparison with too much emphasis on technical know-how. The repatriation and career path process also needs to be addressed urgently.

Chapter Three explains and illustrates the design of the research process. It sets out the research methodology, which will be followed in conducting the research. It is clear from the research literature that organisations need to address a wide range of fundamental issues that result in expatriate success in order to retain their international executives, and there are compelling reasons to collect data which will assist in determining the reasons for expatriate failure, addressing the findings, and assisting organisations to enhance expatriate success.

3.2. Qualitative Research Approaches (General Description)

In this study of expatriate management and the processes involved in expatriate selection, training, family issues, and expatriate repatriation, subjective data gathered by qualitative research techniques was seen as the appropriate option for the following reasons.

Numerous researchers, for example Miles and Huberman (1984), Patton (1990), Strauss and Corbin (1990), and Creswell (1994) have emphasised the usefulness of qualitative research processes in situations where detailed information and explanations of meaning from 'insiders' were required to build concepts or hypotheses for later testing.

Additionally, this study encompasses numerous subtleties and nuances, which cannot be revealed sufficiently from quantitative research such as the questionnaire or survey. These attitudes and opinions, then, translate into management processes and the argument of this thesis is that corporations are not handling the management of expatriates well and that managers are not putting in place the processes and methods needed to make expatriate management work well.

Qualitative methods, according to Marshall and Rossman (1995) and Patton (1990) permit the researcher to study selected issues, cases or events in depth and detail; the fact that data collection is not constrained by predetermined categories of analysis contributes to the depth and detail of qualitative data.

Quantitative methods, on the other hand, use standardised measures that fit diverse ideas, various opinions, and experiences into predetermined response categories. The advantage of the quantitative approach is that it measures the reactions of a great many people to a limited set of questions thus facilitating comparison and statistical aggregation of the data. This gives a broad, generalisable set of findings.

By contrast, qualitative methods typically produce a wealth of rich, detailed data about a much smaller number of people and cases.

Qualitative data provide depth and detail through direct quotation and careful description of programme situations, events, people, interactions, and observed behaviours. The detailed descriptions, direct quotations, and case documentation of qualitative methods are collected as open-ended narrative without attempting to fit programme activities or people's experiences into predetermined, standardised categories such as the response choices that constitute typical questionnaires or tests.

According to Denzin and Lincoln (2000) the word 'qualitative' implies an emphasis on the qualities of entities and on processes and meanings that are not experimentally examined or measured in terms of quantity, amount, intensity or frequency. Qualitative researchers stress the socially constructed nature of reality, the intimate relationship between the researcher and what is studied and the situational constraints that shape inquiry. They seek answers to questions that stress 'how' social experience is created and given meaning. In contrast, quantitative studies emphasise the measurement and analysis of causal relationships between variables, not processes;

and proponents of such studies claim that their work is done from within a value-free framework.

Churchill (1983) made two important observations relevant to the qualitative research approach. Firstly, he observed that researchers who could not find the data needed in secondary sources must collect primary data and, secondly, where primary data collection is appropriate, two main collection methods exist. The first of these methods (communication) involves the systematic checking of appropriate facts or actions. In the current situation, since no relevant secondary data existed, primary data were needed. Because there were no existing facts or established patterns of action to check, observation was not a viable option and some form of direct questioning of respondents, therefore, was deemed more appropriate.

In order to operationalise this approach, face-to-face, semi-structured interviews were used because, as Sekaran (1992: 220) noted, such interviews “*provide rich data, offer the opportunity to establish rapport with the interviewees, and help to explore and understand complex issues*”.

The purpose of the data derived from these in-depth, semi-structured interviews was to gain an understanding of the meanings and interpretations attached to the specific role of human resource managers in the selection, training, and repatriation of expatriate personnel.

Sixty organisations operating internationally in Australia, Singapore, and Malaysia were contacted by letter which explained the purpose of the research project,

introduced the writer, and requested the participation of the organisation in the research process. Organisations from the public and private sector were chosen as leaders in the export and international arenas and were drawn from a broad cross-section of government and industry including banking, insurance, finance, airlines, mining, manufacturing, distribution, and state and federal government departments.

Fifty firms and organisations expressed their willingness to participate in the research programme and accordingly the following research questions, which were designed to guide the research process, were emailed to the respondents with the writer's request for a 'half to one-hour' interview to discuss the issues (see Appendix Two).

Initially, there were nine questions developed (see Appendix Three and Four); however, after testing for clarity and possible ambiguity or overlap in the questionnaire, seven questions were selected as follows:

1. What criteria do you use in selecting expatriates?
2. What selection methods do you use to choose suitable expatriate managers?
3. How important do you consider the partner/family contact to be in the selection process?
4. What training activities do you provide for managers before going overseas?
5. What training do you provide for the partner/family before going overseas?
6. Do you provide any re-entry training or support on return to the organisation?
7. How long do employees usually stay after they return home?

The fifty participating organisations were represented by senior executives, senior human resource managers, and personnel managers in Australia (33 organisations),

Singapore (13 organisations), and Malaysia (4 organisations); each was responsible for expatriates in their respective country. All participants worked at senior corporate levels despite sectoral and organisational differences among the corporations for which they worked.

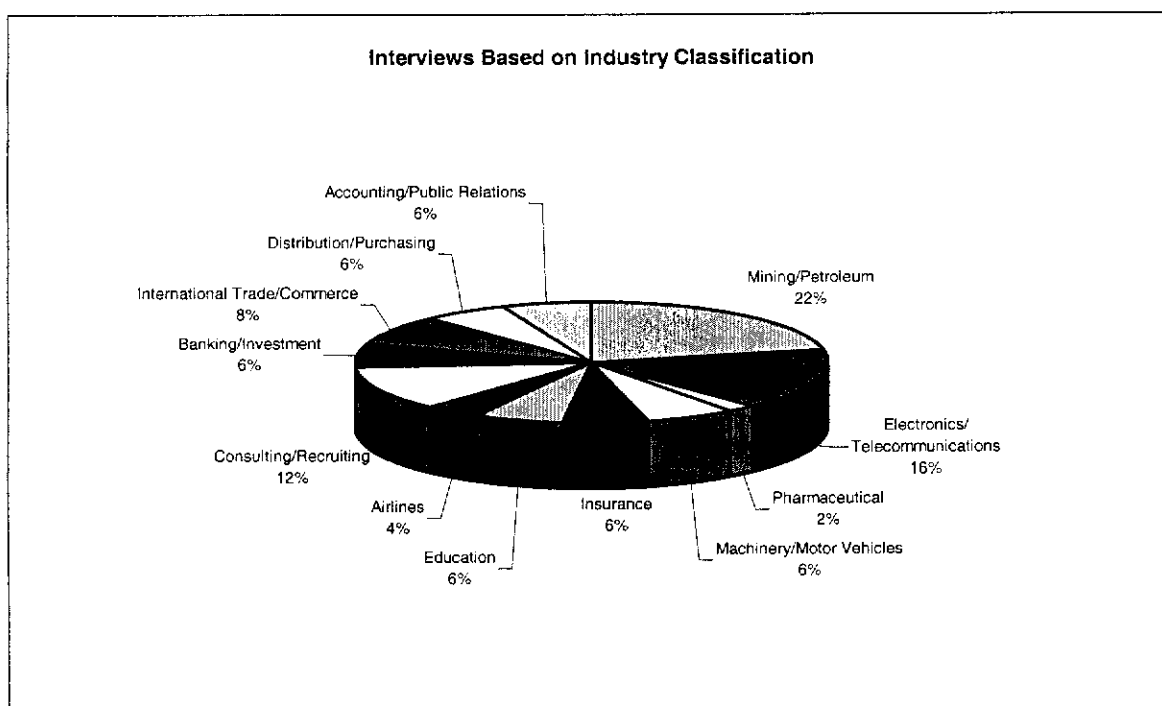
The interviews were secured on the basis of a guarantee of total confidentiality in relation to the identity and names of the multinational or international company and the managers. The following table presents a general picture of the range of organisations across sundry industry descriptors:

Table 7: Interviews Based on Industry Classification

Industry	No. of companies
Mining/Petroleum	11
Electronics/Telecommunications	8
Pharmaceutical	1
Machinery/Motor Vehicles	3
Insurance	3
Education	3
Airlines	2
Consulting/Recruiting	6
Banking/Investment	3
International Trade/Commerce	4
Distribution/Purchasing	3
Accounting/Public Relations	3

In another format (see Figure 9), the relative percentage representation of each type of industry is indicated.

Figure 9: Interviews Based on Industry Classification



As can be seen from the above Figure 9, the participating organisations were drawn from a wide range of industries with the common characteristic being their involvement in expatriate management, particularly in expatriate assignments of over one year in duration. A further differentiation is that five (10%) of the organisations were government agencies and forty-five (90%) were from the private sector.

3.3. Qualitative Approach (Application in the Thesis)

Patton (1990) points out that in collecting qualitative data, the researcher seeks to capture the richness of people's experiences in their own terms. Understanding and meaning emerge from in-depth analyses of detailed descriptions and verbatim quotations. To illustrate what is meant by depth, detail, and meaning in qualitative

methods, Patton (1990) offers an example by comparing a person's responses to a closed and open question on a mail survey.

Quantitative measures are succinct and easily aggregated for analysis and are systematic, standardised, and easily presented in a short space. By contrast, qualitative responses are longer, more detailed, and variable in content; analysis is difficult because responses are neither systematic nor standardised. Yet the open-ended response permits one to understand the world as seen by the respondent and this is revealed clearly in the open-ended comments of the respondent, thereby illustrating the power and depth of qualitative data.

The purpose of gathering responses to open-ended questions is to permit the researcher to understand and capture the perspective of programme participants without predetermining their perspective through prior selection of questionnaire categories.

Direct quotations are a basic source of raw data in qualitative research. Direct quotations reveal the respondent's levels of emotion, the way in which they have organised the world, their thoughts about what is happening, their experiences and their basic perceptions. The task for the qualitative researcher is to provide a framework within which people can respond in a way that represents accurately and thoroughly their point of view about the programme.

Another example of qualitative research, which seeks to capture the richness of people's experience in their own terms and which illustrates the depth and meaning of

qualitative research is given by Dey (1995: 1) with the question “What colour is snow?” As Dey (1995) explains, to most of us the answer ‘white’ may seem satisfactory, but to an Eskimo it would seem a joke as Eskimos distinguish between a wide variety of ‘whites’, because they need to differentiate between different conditions of ice and snow. So it is with qualitative data analysis where understanding and meaning emerge from in-depth analysis of descriptions and quotations.

3.4. Limitations of Quantitative and Qualitative Research

Hitchcock and Hughes (1989) in their discussion of two major models of social research, i.e., the positivistic, scientific model and the interpretative, ethnographic model affirm that an acceptance of the assumptions underlying the scientific method has meant that quantitative-oriented research tended to be the norm. Thus, social surveys, structured interviews, and questionnaires and the use of official and unofficial statistics are the sources of data and methods, which have been predominant. Quantitative data can be measured more easily, patterns can be established more clearly and, therefore, any patterns, which are discovered, and generalisations made will be accurate since they are located within a large body of materials. The use of mathematical models and the notion of ‘correlation’, that is establishing the degree of fit, agreement or association between various factors or variables in a piece of research, works much better when there are large numbers or big samples involved.

Hitchcock and Hughes (1989) cite the example of attempting to examine teacher performance by considering pupils’ achievement in test or examination situations.

The more data the researcher has, the easier it would be for the researcher to establish any causal links and make observations about other cases. Quantitative data presented in correlation studies, social surveys, and statistics feature heavily in research literature and, as Spradley (1980) observes, for many people the larger the sample or the greater the number of people responding to a questionnaire, the better the subsequent theories or explanations will be. In many people's eyes, there is an air of respectability about numbers, which increases, as do the numbers.

Arguments surrounding the use of quantitative data as the exclusive and best source of data for social research are, according to Hitchcock and Hughes (1989), in two forms. First, researchers have drawn attention to the limitations and problems of research techniques which are designed for the collection of quantitative data. Second, researchers have pointed to the problems involved in relying solely upon objective, quantifiable measures or indices of social phenomena without paying attention to the interpretations and meanings individuals assign to events and situations in a qualitative way. Social surveys can capture a large area or population and allow a descriptive measure of the extent of a particular concern, such as poverty; they are important in establishing the nature of our society as a whole. However, critics have pointed to several problems with social surveys, most notably the reliance on fixed or structured questionnaires in such surveys. These questionnaires may not be flexible enough to enable respondents' true feelings or attitudes to come through. People often treat these kinds of instruments with suspicion as the questions may structure responses too much or they may lead the respondent into answering in a particular way, thus affecting the accuracy of the survey.

As Burns (1998) points out, perhaps most important is the overall wording and presentation of a structured questionnaire.

- Is there ambiguity or vagueness in the questions?
- Might the presentation of the questions be off-putting to certain respondents?
- How are questions dealing with sensitive areas worded and presented?

The underlying assumptions of much survey work and the use of fixed or structured questionnaires is that people not only say what they mean, but also do what they say.

Furthermore, it has been argued by Hitchcock and Hughes (1989: 25) that, “*in searching for quantifiable data, researchers destroy or ignore the qualitative context out of which all data emerge, that is out of the day-to-day lives of ordinary people in routine everyday situations*”. Critics of positivism suggest, as Patton (1990) observes, it is as important to look in detail at a small number of respondents, as it is to look generally at a large number of respondents. While not denying the value and significance of the broad general view developed by quantitative approaches, groups of researchers have stressed the need for detailed appreciation of both the immediate, interactional circumstances of events in the social world and the historical and cultural context out of which they grow. This has led a number of sociologists and anthropologists, in particular, towards looking in detail at everyday events by using a range of so-called introspective, biographical, subjective or qualitative research methodologies which are aimed at uncovering the actor’s point of view from within the situations they occupy.

Rather than collecting quantitative data through quantitative techniques like surveys and structured questionnaires, numerous researchers, for example Miles and

Huberman (1984), Patton (1990), Strauss and Corbin (1990), and Creswell (1994) have emphasised that social researchers should collect qualitative data by means of techniques which are designed to reveal the actor's perspective.

3.5. Qualitative Research Approach (Application in the Thesis)

Interviews were conducted in Australia in Perth, Adelaide, Melbourne and Sydney, in Kuala Lumpur in Malaysia, and in Singapore. The collected data was used to answer the research questions using the computerised coding and retrieval system NUD*IST to assist in the development of categories.

In total, fifty senior personnel were interviewed in their offices in the above localities. In recognition of participant contributions to the investigation, the interviewer agreed to provide participants with a copy of the final report.

Conducting the investigation in Singapore and Kuala Lumpur did not place a significant demand on research funding as interviews were able to be conducted to coincide with the interviewer's teaching programme in these two cities during the months of October and November 2000. Previous students who had completed their degrees at Curtin University and returned to either Singapore or Kuala Lumpur were useful contacts in both places. These students were of some initial assistance in suggesting appropriate organisations to contact and, in a few instances, were able to introduce the writer to the relevant senior human resource manager of the participating organisation.

All participants accepted the use of a tape recorder and endeavoured to ensure that disturbances were kept to a minimum during the taped interview. Each interview began with an introduction outlining the researcher's background, interest, and the overall relevance to the research topic. This was found to be a practical first step as it allowed the interviewee the opportunity to respond by expressing his or her interest in the study, to raise issues at the start of the interview and to 'warm up' to the subject at hand.

The importance of recording interviews was demonstrated by the richness of interviewee comments, the propensity to jump to related issues and the length of the responses. Conducting the interview in a business-like manner was considered most appropriate and at all times an honest and frank description of the research process was provided to participants.

The interviewer made a conscious effort not to lead the conversation, but, instead, tried to 'pick up' on each participant's insights in order to validate the responses and also to bring the conversation back to the interview questions. The researcher attempted to maintain a balance between letting the interviewees talk about what they thought was important and trying to keep the discussion focused.

3.6. Qualitative Research Approach

The recorded interviews were transcribed on to word processor documents; each verbatim transcript averaging between 4-6 pages of discussion. The Qualitative Solutions and Research (QSR) NUD*IST program was used to code and interpret the

interview data. NUD*IST stands for Non-numerical Unstructured Data Indexing Searching and Theorising. It is a computer package designed to aid users in handling non-numerical and unstructured data in qualitative analysis and it does this by supporting processes of indexing, searching, and theorising. NUD*IST helps to manage, explore, and search the text of documents, manage and explore ideas about the data, link ideas and construct theories about the data, test theories and generate reports including statistical summaries.

NUD*IST also creates an index database which allows users to:

- Create, record, store, and explore the categories for thinking about the project.
- Index data contained in the document database at particular categories.
- Manage the categories in an index system using an unlimited number of categories and subcategories organised in index trees.
- Modify the index system any time to suit changing ideas in a project.
- Search the index system to find links between categories and data.
- Write and edit memos about any index category.
- Create new categories for further analysis from the results of searches of document text or indexing.

Figure 10, 11, and 12 show the step-by-step process of the NUD*IST program beginning with the conversion of the semi-structured interview transcript into a linear format based on the seven survey questions.

Figure 10: Interview Transcript

SUBJECT:	– 13/4/2000
<p>F: As you know is the Vice President for , and he's actually an expatriate himself so it would have been wonderful to talk to him. So I report to Steve I'm one of the HR managers in the Corporate Area, and one of the staff who works for me, looks after expatriates in particular. And so she's actually far more knowledgeable than myself, so we're very interested in expatriate management, because it's such a challenge to do it well, but we don't have huge numbers, so we don't get a lot of practice, so we're not like some of the organisations that move people around a great deal, where they get to develop fairly sophisticated systems to deal with the number of people they're moving around their organisations, we might only have four at any given time, so we're not talking about large numbers that presents a particular challenge to us, because you're managing a small group of people but the complexity is still there.</p> <p>GN: Where are these four?</p> <p>F: We have who's our HR director in the UK, she's based in Wellington Spa.</p> <p>GN: She Australian?</p> <p>F: Yes, Very experience lady. we have a number of people in our Pure Pack ??, we would have 3 Australians there, who now have Green cards, and are really treated like local nationals.</p> <p>GN: In the US?</p> <p>F: Yes and we do very limited work for them, superannuation, making sure they have insurance, but we certainly have a couple of people there right now who are at lower levels with technical expertise who will go over for short stints ie a number of months, perhaps six months, in the US because the business we're in, they take technology and knowledge with them. We have sort of hybrids, we've got someone in Beijing at the moment who has been educated and worked in the States so he's sort of half and half, because he's not really an</p>	

From the linear format, Figures 11A and 11B show the conversion into NUD*IST proprietary format, which is done so that NUD*IST is able to 'understand' the document. The file format is raw standard text file which is stored by NUD*IST to be coded later.

Figure 11A: Linear Interview Transcript

INTERVIEW WITH:-
DATE:- 13-4-2000

1. What criteria do you use in selecting expatriates?

- We look for good local people in situ (in the country, it self)
or we try to find people who know our business
and who also know the culture of the particular
country - We try to get the best of both worlds.
- Technical ability is relevant criterion for our technical
people e.g. pharmacists. However, Managerial, Cultural and
Leadership criteria are applicable for our senior level
personnel.
- We look for people with developmental ability - future
manager material.
- Criteria would also depend on the expatriate's role or job as
above.

2. What selection methods do you use to choose suitable
expatriate managers?

We use career expatriates mostly in ASIA e.g. China, who
are Western educated but Asian nationalities.

We look for young talented people in our organisation
train them in managerial skills and earmark them for
ops positions after 5-6 years in the organisation.

We also look for young talented people in the host country to nurture
for local positions to executive
positions.

3. How important do you consider the partner/family contact
to be in the selection process?

In the context of choosing the best person to do the
job, if this person is married with family, the
family is very important.

Figure 11B: NUD*IST Proprietary Format

page: 1	8/07/1 10:09:55	
Q.S.R. NUD*IST Power version, revision 4.0. Licensee: Curtin University.		
PROJECT: George. User George Neilson, 10:09 am, Aug 7, 2001.		
.....		
... ON-LINE DOCUMENT: Fauldinga		
... Document Header:		
13 April, 2000		
... Retrieval for this document: 27 units out of 27, + 100%		
.. Text units 1-27:		
*Q.1: What criteria do you use in selecting expatriates?	1	
- We look for good local people in the country itself or we try to find people who know our business and who also know the culture of the particular country, we try to get the best of both worlds	2	
- Technical ability is relevant criterion for our technical people eg. pharmacist, however managerial, cultural, and leadership criterias are applicable for our senior level personnel	3	116, 1113,
- We look for people with developmental ability - future manager material	4	111, 1113, 1114
- Criteria would also depend on the expatriate's role or job as above	5	117, 111, 111
*Q.2: What selection methods do you use to choose suitable expatriate managers?	6	114
We use career expatriates mostly in Asia eg. China, who are western educated but Asian nationalities	7	
We look for young talented people in our organisation, train them in managerial skills and earmark them for O/S postings after 5-6 years in the organisation	8	214 1113
We also look for young talented people in the host country to nurture for later promotion to executive positions	9	125 214 114
*Q.3: How important do you consider the partner/family contact to be in the selection process?	10	116 117
In the context of choosing the best person to do the job, if this person is married with family, the family is very important	11	
*Q.4: What training activities do you provide for Managers before they go overseas?	12	134
We use in Melbourne to support managers	13	
This depends what the business and country require of the manager	14	215
What is required in the role of manager	15	
The UK and USA have different managerial responsibilities than China or Cambodia	16	
Cultural and customs programmes are undertaken	17	211
*Q.5: What training do you provide for the partner/family before going overseas?	18	
Discussions are conducted by HR department about the spouse and family and his/her activities while O/S	19	
What help is required about work O/S when the partner gives up the job in Australia to accompany husband	20	222
*Q.6: Do you provide any re-entry training or support on return to the organisation?	21	131, 135
- There is no guarantee given to the expatriate's that there will be a higher position (or any position) on his or her return to the organisation after say a 2 years tour O/S	22	
- The industry is too dynamic to foretell the situation in 2 or 3 years time	23	318, 312
- We admit that we put more effort into going than into returning	24	
*Q.7: How long do employees usually stay after they return home?	25	314
We have approximately 20-30 expatriates with middle to senior positions and we lose very few	26	
	27	

Figure 12 shows the index tree of 'ideas' created from the NUD*IST proprietary format. An unlimited number of categories and sub-categories can be organised in

index trees. This figure demonstrated very clearly the wealth of information gained from qualitative research and managed by using the NUD*IST package. The 'depth' and 'richness' of the data from the transcripts of the interviews is transparently evident in Figure 12. From the four major research questions there are eight clusters of sixty-two nodes representing expatriate criteria, selection, training, repatriation, and family issues.

Figure 11B shows that each line of the transcript that has been imported to NUD*IST corresponds to a subject in the index tree of Figure 12. Data from the index tree will be analysed in Chapter Four.

Figure 12: Index Tree

```

Q.S.R. NUD.IST Power version, revision 4.0.
Licensee: Curtin University.

PROJECT: George, User George Neilson, 3:49 pm, Aug 14, 2001.

(1 1 1 1) /Selection/Criteria/Ability/Technical
(1 1 1 2) /Selection/Criteria/Ability/Language
(1 1 1 3) /Selection/Criteria/Ability/Culture
(1 1 1 4) /Selection/Criteria/Ability/Leadership & managerial

(1 1 2) /Selection/Criteria/Availability
(1 1 3) /Selection/Criteria/Motivation
(1 1 4) /Selection/Criteria/Experience
(1 1 5) /Selection/Criteria/Best student
(1 1 6) /Selection/Criteria/Fill local needs with local staff
(1 1 7) /Selection/Criteria/Career development
(1 1 8) /Selection/Criteria/Recommendations
(1 1 9) /Selection/Criteria/Suitability
(1 1 10) /Selection/Criteria/Age
(1 1 11) /Selection/Criteria/Future input to the company
(1 1 12) /Selection/Criteria/Children age requirement
(1 1 13) /Selection/Criteria/Internal selection
(1 1 14) /Selection/Criteria/Marital status
(1 1 15) /Selection/Criteria/Company ambassador (PR)
(1 1 16) /Selection/Criteria/Sexual status
(1 1 17) /Selection/Criteria/Racial status

(1 2 1) /Selection/Methods/Demonstration
(1 2 2) /Selection/Methods/Interviewing
(1 2 3) /Selection/Methods/Written test
(1 2 4) /Selection/Methods/Observation (appraisal)
(1 2 5) /Selection/Methods/Utilise headhunting methods (external organisation)
(1 2 6) /Selection/Methods/Utilise host country experts

(1 3 1) /Selection/Family issues/Dual career
(1 3 2) /Selection/Family issues/Children education
(1 3 3) /Selection/Family issues/Motivation to go
(1 3 4) /Selection/Family issues/Supportive family
(1 3 5) /Selection/Family issues/Spouse support by company
(1 3 6) /Selection/Family issues/Poor communication - isolation
(1 3 7) /Selection/Family issues/Spouse participation

(2 1 1) /Training/Expatriate/Cultural - Social
(2 1 2) /Training/Expatriate/Pre-assignment overseas visit
(2 1 3) /Training/Expatriate/Language
(2 1 4) /Training/Expatriate/In-house
(2 1 5) /Training/Expatriate/External
(2 1 6) /Training/Expatriate/At overseas posting
(2 1 7) /Training/Expatriate/Ad hoc (take it or leave it)
(2 1 8) /Training/Expatriate/Previous training-experience
(2 1 9) /Training/Expatriate/Knowledge transfer (outgoing-ingoing)

(2 2 1) /Training/Family/Informal
(2 2 2) /Training/Family/HR help
(2 2 3) /Training/Family/Experience sharing (outgoing-ingoing)
(2 2 4) /Training/Family/Very little or none at all

(3 1 1) /Repatriation process/Problems/Early termination of contract
(3 1 2) /Repatriation process/Problems/Finding relevant position in company
(3 1 3) /Repatriation process/Problems/"Sink or Swim" attitude (no planning)
(3 1 4) /Repatriation process/Problems/No re-entry counselling
(3 1 5) /Repatriation process/Problems/Culture shock
(3 1 6) /Repatriation process/Problems/Family stress
(3 1 7) /Repatriation process/Problems/Short length of stay in organisation after repatriation
(3 1 8) /Repatriation process/Problems/Returning to same or worse position

(3 2 1) /Repatriation process/Supports/Repatriation strategy prior to departure
(3 2 2) /Repatriation process/Supports/Rehabilitation seminar (HRM briefing)
(3 2 3) /Repatriation process/Supports/Family counselling
(3 2 4) /Repatriation process/Supports/Repatriation to appropriate department
(3 2 5) /Repatriation process/Supports/Career path support
(3 2 6) /Repatriation process/Supports/Repatriation strategy prior to end of assignment
(3 2 7) /Repatriation process/Supports/Repatriation allowance

```

Seven interview questions were asked of the fifty participating organisation in this study and these evolved from the five major research questions raised in Chapter One.

The seven questions of the interview survey are:

1. What criteria do you use in selecting expatriates?
2. What selection methods do you use to choose suitable expatriate managers?
3. How important do you consider the partner/family contact to be in the selection process?
4. What training activities do you provide for managers before they go overseas?
5. What training do you provide for the partner/family before going overseas?
6. Do you provide any re-entry training or support on return to the organisation?
7. How long do employees usually stay after they return home?

These questions and their breakdown into categories and sub-categories are graphically displayed in the index tree. Each of these questions is answered quite dramatically by the information one gets on the index tree and answers to these questions will, in turn, answer the five major research questions of the thesis.

In summary, this chapter has emphasised the usefulness of qualitative research processes, which permit the researcher to study selected issues in depth and detail. The data derived from in-depth, semi-structured interviews was to gain an understanding of the role of human resource managers in the recruitment, training, family issues, and repatriation of personnel for overseas assignments; analysis of that data will be discussed in the next chapter.

Chapter Four, to follow, presents the interview results, identifies patterns in the responses and analyses them for their relevance to the research questions.

Chapter Four:

Interview Findings

4.1. Introduction

As Chatterjee, Grainger and Soutar (1999) observe, although there are many possible approaches to the analysis of qualitative data, there is considerable agreement about the underlying principles that apply. As Tesch (1990: 4) has commented, *“despite the fact that qualitative researchers tend to reject standardisation and encourage the modification and embellishment of qualitative research and analysis techniques, there is general agreement that analysis is a process of making sense of narrative data”*.

Dey (1993) used an ‘omelette making’ metaphor to explain qualitative data analysis, observing that omelettes were made by first breaking eggs followed by beating them together again in order to produce something that was quite different from its original form. In more technical language, the *“core of qualitative analysis lies in these related processes of describing phenomena, classifying it, and seeing how our concepts interconnect”* (Dey, 1993:19).

Neuman’s (1997: 421) appraisal of the situation is analogous, as he suggests *“qualitative researchers form new concepts or refine concepts that are grounded in the data. Concept formation is an integral part of data analysis and begins during data collection. This conceptualisation is one way that a qualitative researcher*

organises and makes sense of data". Neuman described the analysis process as an organisation of data into categories on the basis of themes, concepts or similar features which was the basis for the formation of new concepts and the examination of relationships between concepts.

This chapter, then, is in the business of '*making sense of narrative data*' and will do this by '*describing phenomena, classifying it and seeing how our concepts interconnect*'. The interview results are presented, patterns in the responses identified and responses examined for their relevance to the five major questions analysed.

4.2. Factors organisations use in making expatriate selection

Three sub-questions evolved from this major research question and these were:

1. What criteria do you use in selecting expatriates?
2. What selection methods do you use to choose suitable expatriate managers?
3. How important do you consider the partner/family contact to be in the selection process?

4.2.1. Criteria Used in Selecting Expatriates

The system for reporting the results begins with an overview of the range of respondents answers listed in order of frequency and percentage of response (e.g. Figure 13A, Figure 13B).

These answers are examined in detail to determine more precisely what respondents understand by particular terms. The defining of terms is amplified, then, by a selection of short quotes from interview transcripts in order to highlight typical responses.

The following show the criteria reported by senior staff to be used to select personnel for overseas postings.

Figure 13A: Criteria Used to Select Expatriates (Percentage of Companies)

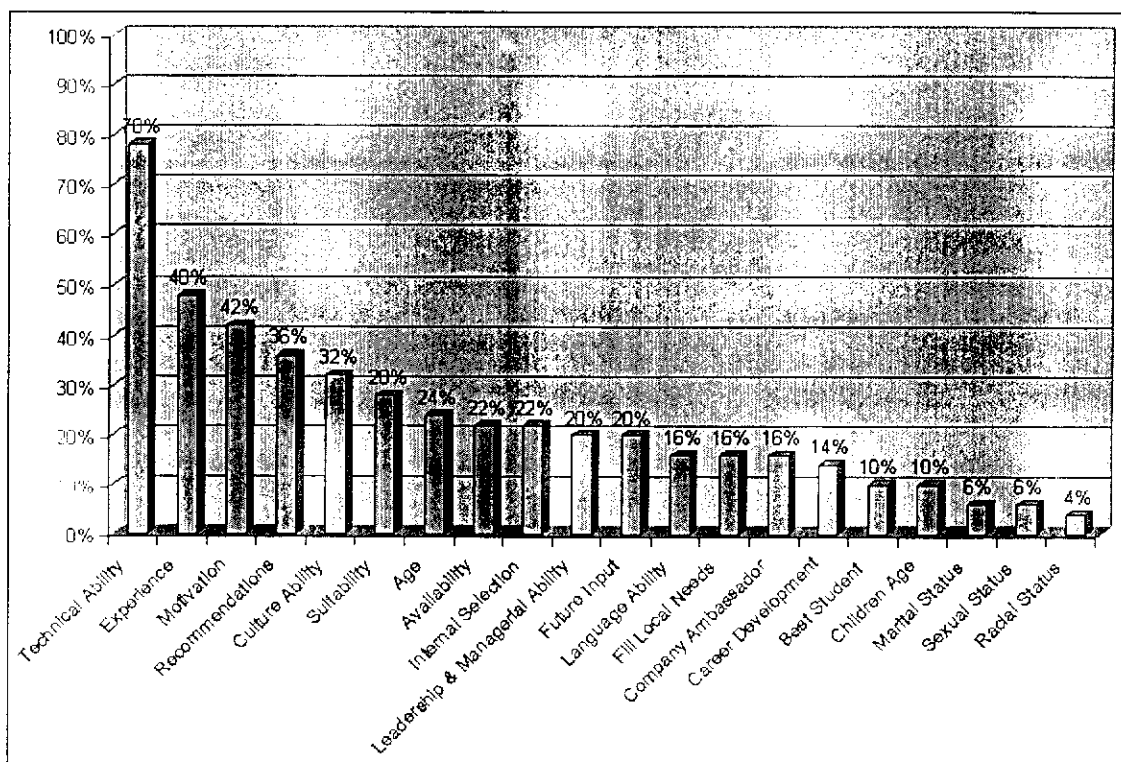
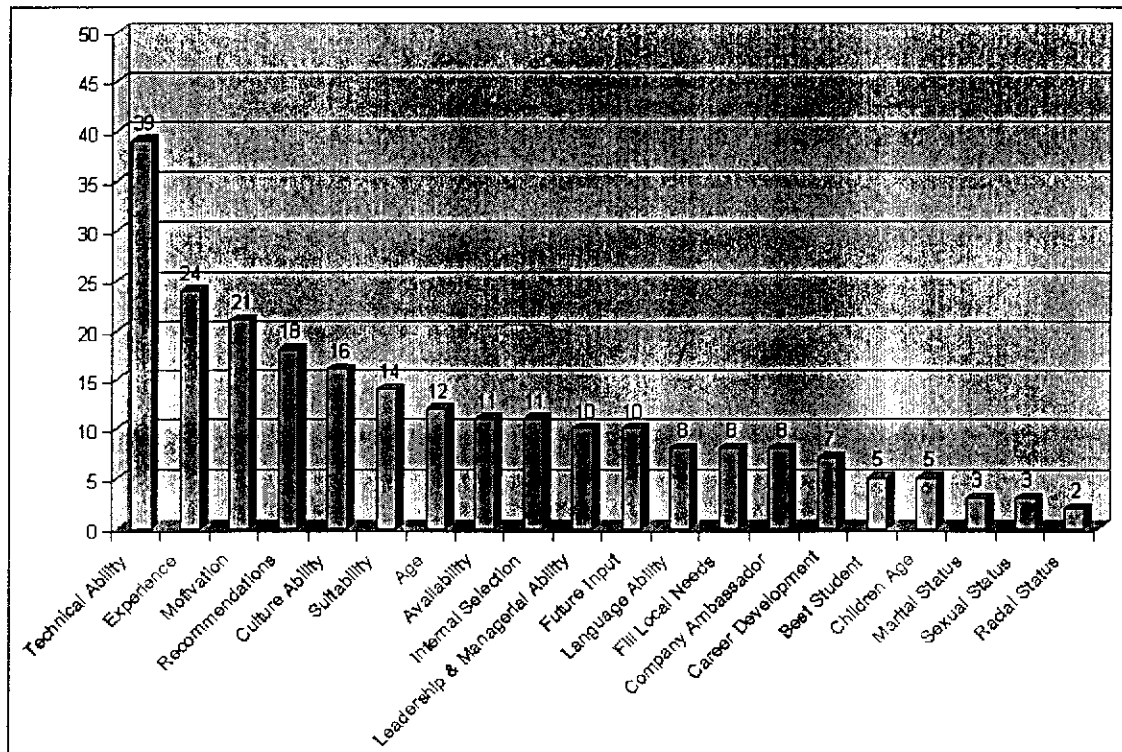


Figure 13B: Criteria Used to Select Expatriates (Number of Companies)



4.2.1.1. Technical Ability

Technical ability clearly tops the list of criteria used by senior staff to select personnel for overseas postings. Thirty-nine out of fifty respondents (78%) stated that this is their first yardstick in selection.

Table 8: Technical Ability

N=39 (78% of total respondents)

These respondents understood technical ability as:

	Responses
Ability to do the job with sound qualifications	10
Ability and availability	6
Specialised personnel with overseas experience	2
Single individuals with technical skills, but job and conditions and region dictate this criterion	1
Preferable young, single, graduates with a background in economics, marketing, or engineering	3
Competency-based skills	2
Suitable for the job, being able to handle staff, administer, and lead	2
Senior level personnel with managerial, cultural, language, and leadership criteria	2
Technical ability and job match	1
Skills available for that particular region/location	4
Knowledge of the organisation and its functions	1
Technically able bright, young, future oriented people from within the group	1
Special technical skills held by people who are familiar with living and working overseas	2
Language speaker equal to technical ability	1
Culture skills equal to technical skills	1

The following interview quotes from Human Resource Managers illustrate some of the concerns regarding the selection process:

“We do not have specific criteria. For us, the first thing is that the job overseas has a technical component and so in most cases it would be the person with the expertise, skills, and availability who would go overseas. The selection tends to ignore other factors such as willingness to go, cross-cultural understanding, and motivation. We really need to focus more on these areas.” (Human Resource Manager, Mining and Exploration Company, Australia)

“This Company is specialised and we have a need for technical experts overseas so selection is based on the ability to do the job. We are experiencing failures and early returns so over the last eighteen months we have taken a more holistic view on how to select people. We are trying to select those who will fit culturally into our African operation. Communicating with overseas staff is also being emphasised.” (Line Manager, Geological Company, Australia)

“Too many people here were selected for their job know-how ability and not their suitability. The selected person should be the best person for the job to be done and not just the easiest person to source.” (HR Director, Private Organisation, Cambodia)

4.2.1.2. Experience

Experience, patience and respect were highlighted by a number of interviewees as necessary pre-requisites for expatriate negotiating in international markets particularly in China, Japan and South East Asia.

Table 9: Experience

N=24 (48% of total respondents)

Respondents understood experience as a criterion for selection:

	Responses
By working with one organisation for ten years or more	4
Maturity and experience in living overseas in similar country of assignment	3
Graduates aged between 30-40 years, with ten years experience	1
On the job experience particularly in specialised fields: mining, geology, and pharmacy	3
Young talented people, trained in managerial skills with 5-6 years working in the company	2
Company people with 5-6 years experience in the organisation	4
Must have 10 years working experience overseas in similar job	4
University graduates	1
Very experienced, long term employee to 15+ years (senior staff only)	1
Successful experience in previous job overseas	1

Also for the best outcomes, older, more experienced people were said by interviewees to be more acceptable to Asian managers in, for example, cross-cultural negotiations and this is reflected in the responses to this question:

“Talented young people with several years experience who would learn quickly and experienced company people are selected” (CEO Multinational Organisation, Australia)

“We look for very experienced long term employees who are mentors to younger Singaporeans. These people are selected for overseas as role models for younger employees.” (HR Director, Brewery Company, Singapore)

4.2.1.3. Motivation

Motivation to go overseas, as a selection criterion resulted in twenty-one (42%) organisations particularly when associated to career development (see Table 22 below) in seven (14%) cases.

Table 10: Motivation

N=21 (42% of total respondents)

Respondents understood motivation as a criterion for selection as:

	Responses
Employees who are enthusiastic to gain experience or knowledge of cross-cultures by being posted overseas	3
Employees desirous to broaden their exposure to living and working in difficult, remote environments	3
Employees motivated and available to go overseas	3
Employees motivated by the job itself, opportunity to work in foreign environment	1
Enthusiasm to learn and develop knowledge for a successful career	1
Emphasising the overseas posting as a strong career move	1
Must be motivated to go overseas: no coercion	1
Promotional aspects are emphasised to increase motivation	1
Desirous of moving around the world to gain experience in diverse cultures, global perspective as a career move	1
Knowing that there is an exciting, long term career ahead with the company	1
Extra money to work overseas	3
Compensate the family for lose of dual income by giving 50% of wife's salary when overseas	1
Willingness to go and motivation to work	1

A number of organisations, mainly in Singapore and Malaysia recruited personnel in their mid to late twenties, local and from overseas, who were highly motivated to go abroad to expand their experience and cross-cultural knowledge in order to enhance their future career prospects. In the majority of the cases, the one to two year contracts was made with no commitment by the employing organisation or the employee to future employment in that organisation. This result appears to be a developing aspect

of the employer/employee relationship in regard to overseas appointment and will be discussed in the repatriation process later in the chapter.

"Most people who go will be motivated by the job itself and the inherent opportunity that comes from working in that particular environment." (Director, International Consulting Company, Australia)

4.2.1.4. Recommendations

Mining companies interviewed were predominant in their use of recommendations as the selection criteria for assignments overseas.

Table 11: Recommendations

N=18 (36% of total respondents)

Respondents understood recommendations as a criterion for selection as:

	Responses
Word of mouth from within or outside	1
Someone experienced and knowledgeable knows someone who can do the job	1
Word of mouth in the case of highly specialised offshore operation	1
Recommendations from allied companies	1
Recommendations from senior management	1
Recommendations from Human Resources Directorate and from employee profiles (CV)	4
Recommendations from other employees	1
Recommendations from consultants	1
Personal recommendations	4
From reputation internationally	2
Nepotism	1

The mining industry appears to be a closely-knit 'community' in Australia and in Singapore where personal recommendations, international reputation, recommendations from employees and consultants are the criteria for selection to highly specialised jobs.

“Word of mouth from within the mining industry and recommendations from other mining organisations and associations.” (GM, International Mining Company, Australia)

4.2.1.5. Cultural Ability

The lack of emphasis on cross-cultural ability, as a criterion for selection (32% of total responses only), was not easily reconciled with the fact that many of the obstacles to successful overseas postings revolve around difficulties in adjusting to new environments, new customs, and cultures.

Table 12: Culture Ability

N=16 (32% of total respondents)

Respondents understood cultural ability as:

	Responses
Overseas work experience in the particular region	3
Empathy with local people	3
Maturity and experience living overseas in similar country (aged 30-40 at least)	1
Cross-cultural ability	2
Local people in country itself who know the business	1
Essential for senior personnel in the organisation (as well as leadership, management ability, etc)	1
Using career expatriates in Asia eg. China – Western educated but Asian nationalities	1
Overseas background and affinity desirable	1
Cultural experience/language ability is essential criteria/competencies	3

The survey further shows that senior people involved in selection processes continue to find cause for concern such as:

“I have seen several instances where colleagues really struggle overseas. A good selection process would probably have avoided or certainly minimised these problems.” (Project Director, Government Aid Program, PRC)

“We try to avoid sending people who want to recreate Australia to wherever they go. They have got to fit in with the cultures overseas and we try to select people who will fit in.” (Personnel Director, Financial Company, Australia)

One of the comments expressed during the interview with the Human Resource Director of one of Singapore’s largest manufacturing companies is relevant to cultural ability, viz:

“Initially our people did not fit in well with the local community. They thought ‘We are a Singapore Company, we will come in and do it our way as the locals don’t know what they are about.’ The locals kicked up a fuss and we were not able to start the operation because the politicians became involved. Now, and in the last two years, we have been getting people in who will address the issues and who can appreciate the issues and we are looking to grow with the relationship.” (HR Manager, Manufacturing Company, Singapore)

4.2.1.6. Suitability

Table 13: Suitability

N=14 (28% of total respondents)

Respondents understood suitability as a criterion for selection as:

	Responses
Ability to do the job with sound qualifications	4
Suitable competencies (“ <i>is he known on the grapevine?</i> ”)	2
Public relations oriented personality	1
Understanding of culture of the country	2
Understanding of people of the country	2
Having passed extensive interview process	1
Suitable CV and profile	1
Based on nature of the job	1

Suitability, as a criterion for selection depended on the nature of the job and the needs of the organisation.

Typical questions used at the time of selection were as follows:

- *How well has the candidate performed in other companies?*
- *Is he known on the grapevine?*

- *Are his competencies suitable? They must be suitable for the job and assignment.*
Is he/she able to handle the task, be it leading or administering?
- *Is he/she a public relations oriented personality?*

4.2.1.7. Age

Age, maturity and experience were all relevant as selection criteria for overseas candidates. Age 'to show' maturity was between 30-45 years.

Table 14: Age

N=12 (24% of total respondents)

Respondents understood age as a criterion for selection as:

	Responses
Mature individuals aged between 32-40	3
Maturity and experience in living overseas, in country of assignment	2
Experience in similar regions	1
Aged between 35-45	2
10 years experience, minimum relevant degree 35-40	2
Young single people with background in economics	1
Young graduates with background in marketing or engineering	1

In some cases, younger, single people with degrees in mining, geology, economics, engineering or marketing were chosen for specialised jobs overseas. These candidates were normally on a one year or two year contract overseas.

"Our policy is to select mature, experienced personnel for overseas positions particularly in underdeveloped countries." (CEO, Multinational Petroleum Company, Australia)

4.2.1.8. Availability

Available staff with experience from within the region and able to do the job was a frequently requested criterion from respondents. Some senior managers, including

some human resource managers, 'manipulated' staff to make them available for overseas assignments by emphasising the promotional and career aspects of a period abroad.

Table 15: Availability

N=11 (22% of total respondents)

Respondents understood availability as:

	Responses
Ability and availability to do the job	1
Availability and motivation to go	2
Many are 'done' deals because the particular manager knows the employee	2
Availability – promotional aspects are emphasised to strengthen motivation	1
We look for Singaporeans in our own company first, then people in Singaporean companies, then people from Singapore, then we look for outsiders	1
Availability from staff within the organisation	1
Availability from staff within the region	3

Comments on availability from 65 percent of Singaporean managers were quite frank as the following quotation shows: *"We look, firstly, for available Singaporeans in our own company, secondly, we look for people in Singapore companies, thirdly, we look for Singaporeans and fourthly we look for available outsiders."*

4.2.1.9. Internal Selection

Over one-fifth of respondents opted for the selection of overseas candidates from within their organisation or an allied organisation.

Table 16: Internal Selection

N=11 (22% of total respondents)

Respondents understood internal selection as:

	Responses
People with deep understanding of the organisation, where it is going and ambassadors overseas	2
Headhunt in the organisation – emphasising internal selection	2
Appointments from within or allied organisations	2
Recommendations from human resources directorate or senior management	2
Selecting company personnel who develop into permanent overseas troubleshooters	1
Selecting carefully from within CV, profile, empathy, & personality for overseas work important assets	1
People with sound overseas experience of region concerned	1

One well-known, Australian based, multinational organisation selected ‘talented young people from within the company and experienced company people’.

Another company in the pharmaceutical business selected ‘people who have a deep understanding of our organisation and where it is going and who are prepared to be permanent overseas ambassadors for the organisation’.

“Our policy is to select company personnel who would develop into permanent overseas troubleshooters.” (HRM, Banking Company, Kuala Lumpur)

“Talented young people from within the organisation and experienced company people are selected” (GM, Multinational Production Company, Australia)

4.2.1.10. Leadership & Managerial Ability

Human resources officers from ten organisations (20%) stressed the need to address conflict resolution skills and leadership styles, particularly for management positions overseas.

Table 17: Leadership & Managerial Ability

N=10 (20% of total respondents)

Respondents understood leadership & managerial ability as:

	Responses
Motivated by the job itself is inherent opportunity from working in that environment	3
Senior people must have human resources management ability	2
Ability to manage, motivate, & lead by example	3
Management capability/leadership skills	1
Own leadership programme	1

Interviews with Australian organisations trading with Singaporean and Malaysian companies found that dealing collaboratively with cross-cultural interpersonal conflicts was related to more effective adjustment.

“We look for leadership ability in selecting expatriates and also managerial experience and the ability to motivate” (HRM, Multinational Mining Company, Australia)

“Leadership ability along with managerial skills and technical ability are required for selection.” (HR Director, Australian Airline)

4.2.1.11. Future Input to the Company

The emphasis on future input to the organisation in the expatriate selection process is a motivator to the expatriate and sound policy for the future on the part of the company. These advantages are evident from the comments made by human resource managers such as:

“We look for people with developmental ability and future manager material.”

“Feedback from returned staff is recorded and forms part of our pre-departure training for new expatriates.”

“Our policy is to use the experiences and new skills and abilities of returned employees as future input to train and mentor replacements in that particular region.”

Table 18: Future Input to the Company

N=10 (20% of total respondents)

Respondents understood future input to the company as:

	Responses
Our policy is to use the experiences and new skills/abilities of returned employees as future input	1
To train and mentor replacements in that particular region, field, operation, etc	1
Future input is important so we look for people with developmental ability (future manager material)	1
We try to provide a clear career path prior to initial departure – an assurance of a role to play on return to Singapore or overseas	1
Employees expected to train local staff while overseas	1
Feedback from repatriates is recorded & forms part of future pre-departure training for new expatriates	1
Many repatriates go into another role overseas when their current assignment finishes Many have gained experience and promotion and go into different job or countries	1
The offshore expatriate is expected to create a succession plan as part of his job overseas The expatriate is responsible for training several people, one of whom could be chosen as replacement It is in the expatriate's interest to keep in close contact with developments to ensure a position on repatriation	3
Using repatriates' overseas knowledge and leadership is expected and appreciated	1
We move people around on return frequently to gain creativity & fresh ideas	1
We send our best to universities or select from universities These are our future expatriates We look after them	1

4.2.1.12. Language Ability

Language proficiency, specifically raised by eight organisation (16% of the companies interviewed), enabled the expatriate to communicate with host country nationals and contributed strongly to an understanding of the country's culture.

Table 19: Language Ability

N=8 (16% of total respondents)

Respondents understood language ability as:

	Responses
Based on competencies – what skills are required for the job? We select on technical, language, social, cultural abilities, etc	1
Deeper probing as to real suitability does he/she speak the language?	1
Language ability very desirable	1
Language and cultural ability are necessary	2
Japanese language fluency	1
Language speaker equal to technical ability	1
Language ability	1

The overseas manager's willingness to communicate indicated whether he or she will actually use the foreign language and his or her social orientation denoted the expatriate's ability to develop significant relationships on and off the job.

Language is also important for information generation.

"This company is revising and streamlining its selection program to include all selection based on competency based descriptions. What skills are required for the job? Based on competencies, we select the relevant expatriates e.g. language ability, cultural ability, technical ability and social ability." (HRM, Multinational Engineering Projects Company, Australia)

4.2.1.13. Fill Local Needs with Local Staff

Filling local needs with local staff or host-country nationals is a polycentric staffing approach more likely to be effective when implementing a multinational strategy.

Table 20: Fill Local Needs with Local Staff

N=8 (16% of total respondents)

Respondents understood fill local needs with local staff as:

	Responses
We look for good local people in the country itself	1
We try to find people who know our business and who know the culture of the particular company – we try to get the best of both worlds	1
We look for young, talented people in the host country to nurture for later promotion to executive positions	1
Fill needs locally wherever possible	1
Try to use local managers in sites in the overseas country where possible	1
Look for local people in corresponding country	1
We recruit from within to strengthen our culture but overseas we look for bright, talented youngsters to promote as locals	1
We aim to recruit/train local people overseas	1

If a company wants to ‘act local’, there are obvious advantages to staffing with local managers who are naturally familiar with the local culture, language, and ways of doing business. They already have many contacts in place.

As one respondent said “*We look for good local people in the country itself or we try to find people who know our business and who also know the culture of the particular country; we try to get the best of both worlds.*” (HRM, International Insurance Organisation)

4.2.1.14. Company Ambassador

Eight organisations (16% of those interviewed), emphasised the importance of the public relations/company ambassador role linked to effective communication; this is central to expatriate success because it determines the expatriate’s ability to obtain the information needed for good decision making.

Table 21: Company Ambassador

N=8 (16% of total respondents)

Respondents understood company ambassador as:

	Responses
People who have deep understanding of their organisation and where it is going and who are prepared to be permanent ambassadors overseas	3
Ten years plus experience of company and public relations oriented personality Mature individual	1
Our policy is to select personnel who develop into permanent overseas troubleshooters	1
Ability to represent company overseas	1
Age between 35-45	1
Management capability, leadership skills, knowledge of company Japanese language fluency	1

“Ability to represent the organisation overseas, maturity with age ranging from 35-45 years, management capability with leadership skills, knowledge of our organisation and Japanese language fluency. These are the qualities we look for in our company ambassadors.” (HRD, Japanese Automobile Company, Australia)

4.2.1.15. Career Development

Career development is considered an important factor in selection criteria and expatriates who are flexible, open-minded, and less judgemental are likely to be more effective and adjust more easily. Only seven organisations (14% of companies interviewed) highlighted this area and those that did commented that since expatriates are exposed to unfamiliar situations, their interest in and willingness to try new things facilitate cross-cultural adjustment.

Table 22: Career Development

N=7 (14% of total respondents)

Respondents understood career development as:

	Responses
People who go will be motivated by job itself + opportunity in that overseas environment	1
Enthusiasm & willingness to learn a new career Emphasise overseas posting as a strong career move to motivate personnel to go overseas. Out of sight - out of mind is not our philosophy	1
It is a very good career move to accept an overseas position	1
You can expect recognition, promotion, and a sound career	1
Emphasise career path	1
Must have career development to promotion to executive position	1
Desire to move around the world to gain experience of cultures, perspectives, working situation	1

Furthermore, as Cooper (1988) points out, having to cope with unfamiliar situations and increased demands on and off the job results in stress. The expatriate's ability to cope with stress has an impact on cross-cultural adjustment and needs to be considered in the selection criteria.

"Emphasise career path and emphasise that overseas work is part of career development and our organisation looks for this in the rise to senior status." (HRD, Multinational Computing Company, Singapore)

"We are constantly looking for young talented people to nurture for future executive positions." (CEO, Pharmaceutical Company, Australia)

4.2.1.16. Best Student

Five organisations in Australia and in Singapore run graduate development programmes linked to Australian and Singaporean universities mainly in the engineering and economics faculties.

Table 23: Best Student

N=5 (10% of total respondents)

Respondents understood best student as:

	Responses
Talented young people	1
Experienced company personnel	
Selecting best students from Singapore's universities	1
We want best degreed people	3
We have a graduate development programme and scholarships are offered linked to South Australian universities	

Selected students are awarded scholarships to fund their studies and research. Graduates are subsequently nurtured and earmarked for further promotional careers within the organisation. Overseas selection and assignments form an integral part of their career development and rise in the company hierarchy.

"Nowadays, we look for people with degrees whereas previously the insurance industry was based on length of service, loyalty and experience." (HRM, International Insurance Company, Australia)

"We select the best student available from the National University of Singapore or Nanyang University." (HRD, Project Engineering Company, Singapore)

4.2.1.17. Children Age

Senior managers interviewed in Singapore were reluctant to select expatriates with children of school age. They argued that educational facilities and educational development of children in many countries overseas were detrimental to their overall wellbeing. An additional factor was the problem of 'boredom' experienced by young people in difficult postings.

Table 24: Children Age

N=5 (10% of total respondents)

Respondents understood children age as:

	Responses
Avoid children between age of 5-18	2
If children applicable ages between 5-18, not desirable for overseas assignments	1
Children age is important as we refrain from sending employees with older 13+ years old children	1
Selected if children either pre-school or finished academic studies Not in between effectively 5-18	1

The impact on the productivity of the expatriate was also a serious consideration.

On the other hand, Australian managers generally saw an accompanying family as an asset and the overseas posting a worthwhile experience for their children.

“Expatriates with children are selected if their children are either pre-school or finished academic studies. Not in between and effectively not between 5-18 years of age.” (HRM, Singapore Telecommunications Organisation, Singapore)

“We look upon the accompanying family as an asset and a worthwhile experience for the children in the family.” (CEO, Commonwealth Government Department, Australia)

4.2.1.18. Marital Status

Marriage separations, breakups and sometimes divorce were commonplace among unaccompanied, married employees according to human resource managers interviewed in three mining organisations.

Table 25: Marital Status

N=3 (6% of total respondents)

Respondents understood marital status as:

	Responses
Preferably single individuals but job/conditions/region dictate this criterion	1
Selection of family to remote areas is limited to single personnel	1
Selection of married personnel is carefully considered because marriage breakups tend to be commonplace among unaccompanied married engineers	1

Selection of married personnel is carefully considered as, frequently, postings are to remote areas where environment and accommodation are basic and more suitable for single personnel.

Nevertheless for employee stability and overall family wellbeing, staffs were encouraged to have their partner and family accompany them wherever possible on overseas assignments.

“Preferably single individuals but job and condition and regions dictate this criterion.” (HRD, Multinational Construction Organisation, Australia)

4.2.1.19. Sexual Status

Three Asian organisations interviewed specifically stated that for assignments abroad, males rather than females were selected. One of the assignments was to look after the company’s interests in the Middle East and the others were in China and Japan where male representatives were thought to be more acceptable and more successful in business negotiations.

Table 26: Sexual Status

N=3 (6% of total respondents)

Respondents understood sexual status as:

	Responses
Select qualified males from within company	1
Single individuals, male	1
Female preferred	1

“Select known males from within the company.” (HRM, Motor Distributorship, Kuala Lumpur)

“Single, male, individuals selected.” (HRM, High-Tech Company, Singapore)

4.2.1.20. Racial Status

Two Asian organisations, one in Singapore and one in Malaysia included in the criterion for overseas postings that the candidate must be a Singapore citizen (for Singaporean company) and an indigenous Malay, preferably female (for Malaysian organisation).

Table 27: Racial Status

N=2 (4% of total respondents)

Respondents understood racial status as:

	Responses
Singaporeans, possibly Malaysian	1
Bumiputera (indigenous Malay)	1

Further comments will be made in the next chapter, Analysis of Data, regarding racial status in Singapore and Malaysia. For example, the Malaysian Civil Service including the foreign service is made up almost exclusively of indigenous Malays or bumiputera while in Singapore, it is very difficult to obtain employment if you are not a Singapore permanent resident or hold a visitor’s temporary visa.

"Female, preferably single and indigenous Malay required." (Personnel Officer, International Insurance Company, Kuala Lumpur)

"Bumiputera (Indigenous Malays) are selected for positions in the Government Civil Service." (HRD, Malaysian Government Department, Kuala Lumpur)

4.2.2. Selection Methods Used to Select Suitable Expatriate Managers

This second survey question investigated the methods used in selecting expatriates for overseas assignments. Figures 14A and 14B show by number of organisations and by percentage, the primary selection methods used to choose expatriates.

Figure 14A: Selection Method Used to Choose Expatriates (Number of Companies)

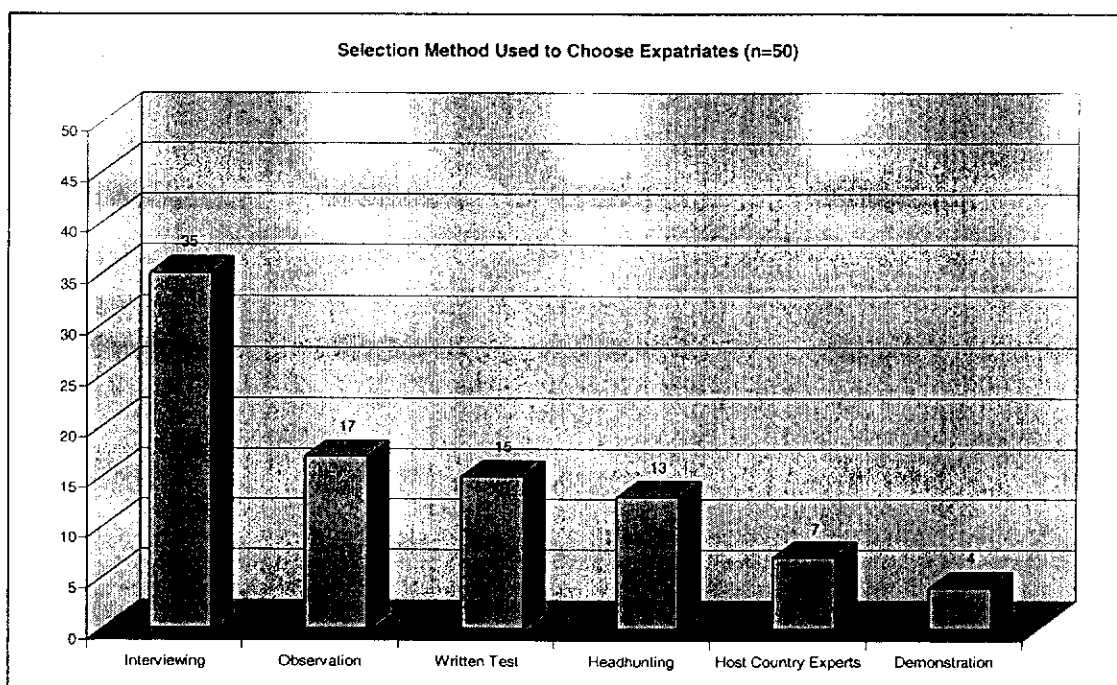
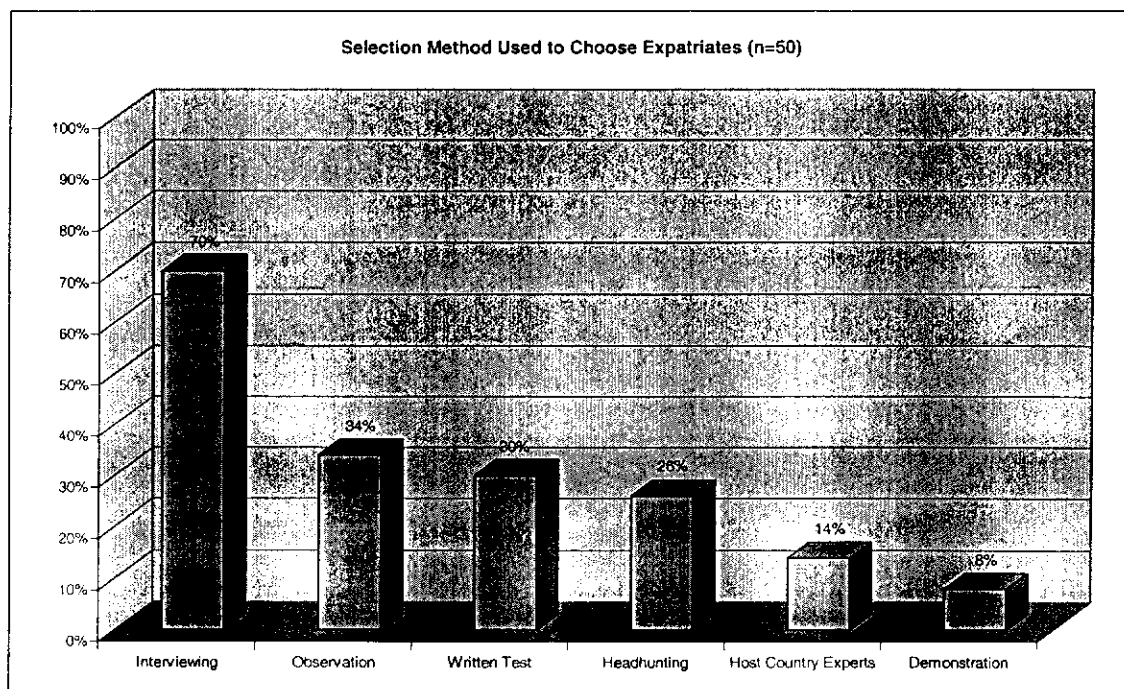


Figure 14B: Selection Method Used to Choose Expatriates (Percentage of Companies)



Twenty-five organisations (50% of participants) said that interviewing was the primary method of selecting a person for an overseas position. Observation and performance appraisal was second with seventeen organisations (34%) and fifteen organisations (30%) used written tests mostly undertaken through private consulting companies.

The survey question revealed two areas of concern, the first being a narrow focus on reference checks which suggested that less attention was given to the choice of staff for international assignments which necessarily involved complex challenges and broader responsibilities than was the case for internal promotion. Thus, whilst an internal managerial promotion would usually include a written application, a series of selection interviews and reference and appraisal checks, this process was not reported as standard in the selection choice of international staff.

The second area of concern in the method of selection was the low level of involvement of human resource managers in the selection decision making process which, according to the human resource directors of a multinational oil company based in Australia, 'could be greatly improved by including a human resource expert in the expatriate selection process'. The following quote from a senior human resource manager of one of Australia's larger insurance groups tends to confirm this alarming situation:

"We are hoping to introduce a minimum set of criteria into interviews for foreign assignments but need the support of Line Management and Senior Management. The bottom line is that if people are told to go, they go and line managers have the final say in this." (HR Manager, Insurance Organisation, Australia)

The irony of this situation is that in cases where the 'management' choice fails to make the grade or where dual career or family problems arise, the human resource manager inevitably is called in to sort out and solve the problem.

4.2.2.1. Interviewing

Selection for overseas postings begins with a series of interviews not only with the candidate but in a growing number of companies, with the working partner. This process of interviewing allows senior management to better assess the suitability of the candidate and if applicable the partner.

Table 28: Interviewing

N=35 (70% of total respondents)

Respondents understood interviewing as:

	Responses
Interviewing and observation extensively	4
Interviewing and motivation to go overseas	1
Questionnaires and conceptual knowledge of organisation and its future plans	2
Interviewed by overseas personnel in host country	3
Recommended by allied companies	4
In-house selection – company people usage in appointments, also host country interviewers	3
Interviewing as a selection method, depends on the job, the people experience, age, motivation, outlook, and personal development	2
Emphasise contribution to the organisation	2
Tend to interview people we know or strongly recommended by people we know	5
Seminars and motivation observations	2
Rigorous interviewing through our own leadership training programme	3
Demonstration for applicable jobs eg. IT & computers	4

“Interviewing to ensure cultural sensitivities and also visit the overseas site with local personnel.” (HRM, Gold Mining Organisation, Australia)

“Interviewing, observation and enthusiasm to go overseas.” (Personnel Officer, Electronic Company, Singapore)

4.2.2.2. Observation/Appraisal

Observation of the candidate for a responsible position overseas was used as a method of selection often in conjunction with informal appraisals particularly of personnel who are being selected from within the organisation.

Table 29: Observation/Appraisal

N=17 (34% of total respondents)

Respondents understood observation/appraisal as:

	Responses
Observation/interviewing overseas for several weeks to assess and report on return	2
In-depth appraisal for selective jobs eg. Mining	4
Observation for motivation, creativity, enthusiasm	1
In-house selection	3
Close observation and demonstrating knowledge of company's large range of products	1
Close observation to assess personality, empathy, and any pre-posting problems	1
Use an Overseas Assignment Inventory to assess suitability	1
Emphasis on overseas personnel for appointments	2
Observation appraisal and interviewing firstly by human resources department then line, then if applicable senior management	2

Personal profiles, empathy and personality are carefully observed for what is normally a mid to senior level overseas position in the company.

Seventeen organisations (34 percent) interviewed then sent the preferred candidate, and frequently with partner, to the overseas post for several weeks. Observation and informal appraisal would be assessed there and on the incumbent's return.

"We select carefully looking particularly at personal profile, empathy and personality." (HRM, Multinational Manufacturing Company Australia)

4.2.2.3. Written Test

The use of written tests designed to identify a candidate's aptitudes, intelligence and interests were used by only two organisations. Questionnaires to assess cultural suitability were frequently used.

Table 30: Written Test

N=15 (30% of total respondents)

Respondents understood written test as:

	Responses
Questionnaires and written test of knowledge of organisation	3
Cross-cultural questionnaire conducted	2
Psychological testing	2
In-house written tests	3
Written IQ tests	5
Self assessment/self profile exercises	

Several interviewees pointed out that the use of written tests have declined over the past decade as it has been difficult to demonstrate that they are related to actual job performance. Self assessment exercises and profiles were often used as methods in the selection of expatriates.

“Questionnaire, interviewing, written knowledge of the organisation and it’s future plans are methods we use in the selection process.” (HRM, Brewing Company, Singapore)

“We use IQ tests, Self –Assessment and Self-Profile written exercises as methods of selecting personnel for overseas posts.” (CEO, Overseas Consulting Group, Australia)

4.2.2.4. Headhunting Methods

Headhunting is a common method for selecting senior personnel for overseas positions particularly in Singapore and Malaysia. Consultants are employed to use this geocentric approach to get the best possible person for the job.

Table 31: Headhunting Methods

N=13 (26% of total respondents)

Respondents understood headhunting methods as:

	Responses
Headhunt in organisation as emphasis on internal selection	4
Use outside consultants to headhunt emphasising psychological testing and cross-cultural knowledge	2
We look for: <ul style="list-style-type: none"> - Young talent - Train them - Earmark them for overseas after 6+ years 	1
For senior positions we headhunt ourselves; for other positions, we use consultants	2
We are client-driven so we headhunt to coincide with client's needs	2
Use our overseas local staff to headhunt together with ourselves	2

"We look for young, talented people in our organisation, train them in managerial skills, and earmark them for overseas postings after 5 – 6 years in the organisation."(HRD, Pharmaceutical Company, Australia)

"We use headhunting measures by outside consultants for senior staff and employment agencies for junior staff and less senior positions." (Personnel Officer, Banking Organisation, Singapore)

4.2.2.5. Host Country Experts

Company in-house training and selection is conducted jointly by home personnel and host country experts in several organisations. The use of host country experts as mentors to new arrivals particularly younger, inexperienced expatriates is beneficial to the company as well as the expatriate.

Table 32: Host Country Experts

N=7 (14% of total respondents)

Respondents understood host country experts as:

	Responses
Use overseas experts regarding culture, country, politics, company objectives	2
Use overseas consulting companies in Indonesia and Malaysia for incumbent expatriates	1
Mentor programme operates in host country also operates in-house	1
International experts used	2
Use videoconferencing, teleconferencing, visits by overseas expatriates to home office	1

“The method of selection of expatriates being sent to Indonesia is designed by an Indonesian consulting group and administered by this group to prospective employees who anticipate working in Indonesia.” (HRM, Mining Organisation, Australia)

4.2.2.6. Demonstration

Demonstration of personal competencies and observation by selection staff are selection methods used by companies. A thorough knowledge of the company's products particularly high technology products is a pre-requisite to selection in these organisations.

Table 33: Demonstration

N=4 (8% of total respondents)

Respondents understood demonstration as:

	Responses
Demonstrate clearly knowledge of: - task - ability - company products	2
Demonstrate competencies – we look at past behaviours to predict future behaviours or competencies	2

“Our selection methods are close observation and demonstrating competencies required to do the job. We look at past behaviours to undertake future behaviours.” (HRD, Consulting and Recruiting Organisation, Australia)

“Demonstrate a knowledge of the companies extensive range of goods.” (HRM, Manufacturing Multinational, Australia)

4.2.3. Involvement of Partner/Family in Selection

The role of the partner and family were considered in conjunction with selection criteria and the following question was asked of respondents in relation to this role:

“How important do you consider the partner/family contact to be in the selection process?”

The following two Figures, 15A and 15B, show that fifty-six percent of respondents confirmed that a supportive family was a critical issue in the selection criteria. Family member who is not adjusting, is experiencing culture shock and/or displaying inappropriate actions for dealing with relocation stress, according to Black and Gregersen (1999), will affect the chances of expatriate success.

Figure 15A: Importance of Family Issues in the Expatriate Selection Process (Number of Companies)

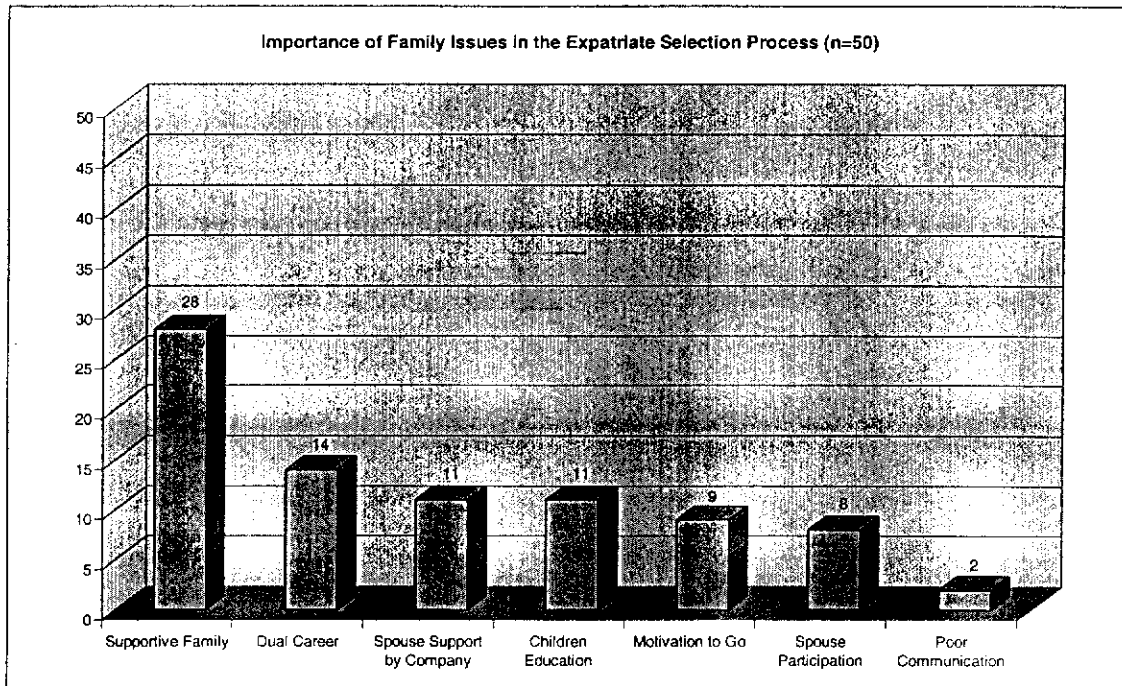
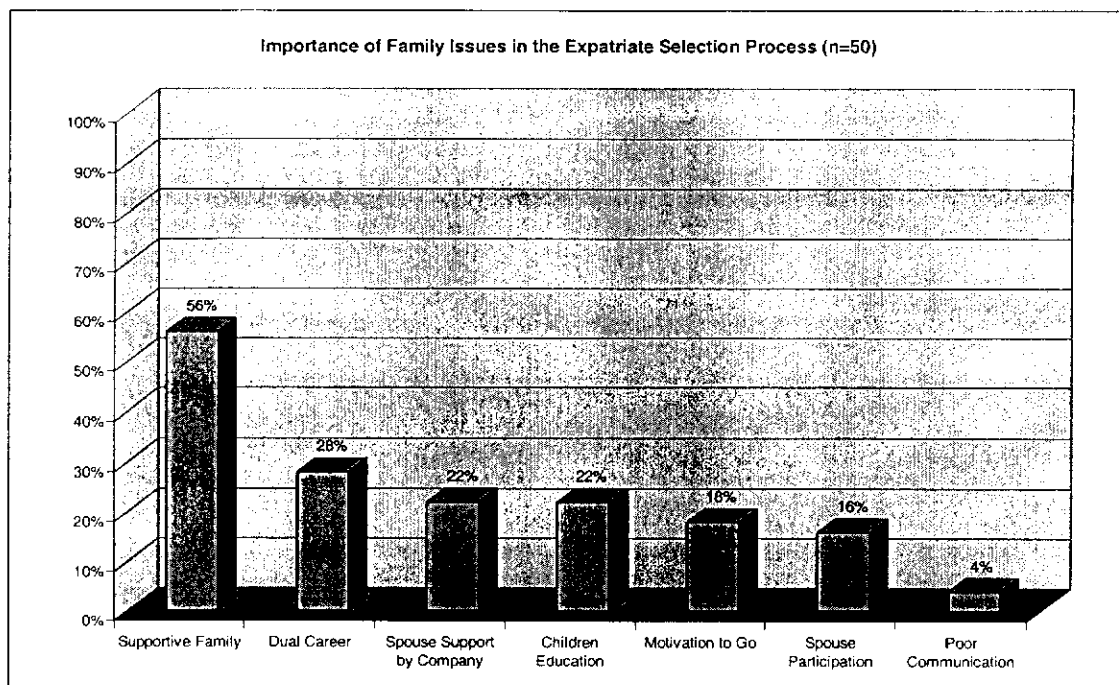


Figure 15B: Importance of Family Issues in the Expatriate Selection Process (Percentage of Companies)



4.2.3.1. Supportive Family

A response rate of fifty-six percent of the organisations (28 out of the 50) affirmed the importance of a supportive family implying that not only should the expatriate's personal and technical qualities be considered but, so, too, should the personal qualities of the family.

Table 34: Supportive Family

N=28 (56% of total respondents)

Respondents understood supportive family as:

	Responses
Family very important Effort made to seek employment for spouse overseas and schooling for children	5
Important and should be consulted and encouraged to participate in decision making regarding housing, schooling, children, dual-career, and so on	1
Family must back the incumbent We emphasise family support and employee satisfaction so family is important	5
Family acceptable but avoid school age if possible	2
Partner must agree to overseas posting as dual-career commonplace today	2
In the context of choosing the best person for the job, if that person is married then family is important	1
In difficult postings eg. Nigeria, China, Laos, family is very important as support for a productive employee	5
Family support essential to wellbeing of employee -- very important for stability	5
Family not encouraged to accompany partner/incumbent due to social & political unrest	1
Important, but, interviews do not include the partner however company wants partner support	1

Replies from interviewees underlining the importance of the supportive family in the selection process are as follows:

“What is important is that partners should be involved and consulted in the selection process, as this is an area where problems occur when not enough consideration is given to the family unit. The expatriate who is doing the job is adapting to a new

position in a new environment and it's very rewarding, but, for the partner who perhaps may have had to give up a career to go to Indonesia or another country with children to settle into new schools, those considerations need to be met and accommodated in the selection process.” (Recruitment Director, Federal Government Department, Australia)

“Family, ability to work in isolation, family's ability to adjust are all critical considerations.” (HR Manager, Gold Processing Organisation, Australia)

“Given technical expertise, personality traits, and the adaptability of the partner and family often play a larger role in an employee's success at adapting to a new environment and culture and working productively.” (Personnel Director, Telecommunications Company, Singapore)

4.2.3.2. Dual-Career

The interviewer found that dual-career issues, raised by twenty-eight percent of respondents (14 out of 50 organisations), are becoming an increasing phenomenon which needs to be accommodated within the selection process. Because both spouses are often corporate ‘fast trackers’, the demand that both sets of needs be included on the bargaining table has to be met.

Table 35: Dual-Career

N=14 (28% of total respondents)

Respondents understood dual-career as:

	Responses
As dual-career is so commonplace it is important that the partner must agree to the overseas posting as well as the expatriate Important as combined dual-career salaries may be more than expatriate's single salary, some companies try to find jobs for partners at the post	3
We compensate the dual-career expatriate with 50% of partner's salary while overseas as Singapore cost of living is very high, jobs are scarce and career important to both parties	3
Very pressing issue nowadays	5
Where dual-career issue is not recognised partner gets bored overseas and wants to come home possibly with expatriate (early return)	3

A number of companies interviewed use informal means such as intercompany networking to help find the accompanying 'trailing' spouse a position in the same location. They are aware that, with the increasing number of dual-career couples, if the spouse does not find a position, the candidate for the overseas posting will very likely turn down the assignment or, they decline because they cannot afford to lose the income or they worry that it may derail the spouse's career entirely if he, or she, is out of the workforce for a few years (see Table 35).

Organisations interviewed in Singapore and Malaysia confirmed that almost all of their married personnel are in dual-career situations and were offered various incentives or supportive packages to compensate for the loss of earnings. Some Singapore companies paid expatriates additional allowances to compensate for a loss in the dual-career income. Others paid all the educational expenses for the dependents and tutorial expenses for the spouse to teach the children during the overseas contract. Australian organisations interviewed generally adjusted the cost of living allowance for married personnel with children, but tended not to specifically target the dual-career dilemma. This point is worth noting for further research in the future.

"Today, more than ever before, dual-career couples on overseas postings should be accommodated otherwise a premature return can be expected." (CEO, Multinational Exploration Company, Australia)

4.2.3.3. Spouse Support by Company/Organisation

All organisations interviewed said that they were aware of the need and importance to support the spouse; however, only eleven out of fifty organisations (22 percent)

confirmed that this was part of their policy and that they actively assisted the spouse wherever possible.

Table 36: Spouse Support by Company/Organisation

N=11 (22% of total respondents)

Respondents understood spouse support by the organisation as:

	Responses
We encourage the spouse's participation when overseas regarding choosing accommodation, schools, locality, etc We pay relocation expenses outward & inward	1
Company supportive in dual-career situation	1
Company supportive in learning language	1
Company supportive in schooling children	1
Company supportive in assisting with job	1
We pay for internet access to keep in contact with family at home	1
We pay for correspondence courses to keep partner occupied	2
We try to put suggestions from the partner into practice if possible	2
We select expatriates with partner support where possible	1

Replies from interviewees underlining the importance of the partner and family in the selection process are as follows:

"One of our engineers was selected for his job expertise to work in South America. We should have considered the broader issues particularly regarding his wife and two small children. They are living in Rio, which is a pretty dangerous city so although the kids are oblivious to it, the wife is paranoid about safety and security. She wants to come home and he is thinking likewise." (HR Manager, Project Company, Australia)

"In the late 1980s we did move to a situation where we interviewed wives with husbands to find out if wives really wanted to go. It was recognised that this would be a sensible thing to do to avoid further loss of unhappy expatriate staff with unhappy wives and families." (Personnel Manager, Consulting Company, Australia)

"Having witnessed unsuccessful selection, I believe a comprehensive selection process is very important. Never underestimate the need to satisfy the spouse." (General Manager, Finance Company, Singapore)

“We try to put ourselves in the position of the partner and the family. What would a partner with children on an overseas assignment want to know?” (HR Director, International Bank, Malaysia)

Overall, company support by way of relocation assistance was an important determinant in a couple’s decision on whether or not to relocate. The interviews disclosed that the accompanying spouse is frequently responsible for the day-to-day logistics of a move so it is not surprising that they view relocation assistance as more important than does their partner.

Yet, despite the fact that the spouse is one of the main end users of the relocation services and a strong determinant of the success of the relocation, it is not routine practice in Australia or South East Asia for them to be consulted and this was made abundantly clear during this research.

Most organisations interviewed do offer some sort of relocation assistance to help employees and families cope with the stresses associated with moving (see Table 36). As Figures 15A and 15B show, only eleven (22%) of the respondent organisations assist with the education of the children of the expatriate.

Some companies help in the renting or selling of the family home (12 percent of companies interviewed), and 20 percent of companies paid for visits to the new area with spouse and children. Seminars regarding cultural information about the new location with employee and spouse were provided by 40 percent of companies interviewed.

4.2.3.4. Children's Education

Dependent care information such as childcare availability and educational information including schools were provided if requested by the partner and spouse.

Table 37: Children Education

N=11 (22% of total respondents)

Respondents understood children's education as:

	Responses
Education for children when overseas is a very strong concern in Singapore & Malaysia and in Australia	3
Children's education is a major concern to the expatriate & partner whether to accept the posting or not	4
Partner to be consulted and to be involved with children's education	1
We pay for children's education by child allowances	2
We underwrite the cost of tutorial fees for families overseas	1

Several human resource managers, during the course of the interviews, made the point that adequate child care is vital for dual-income families because the spouse cannot secure a new job until this issue is resolved. For expatriates from Australia with school-age children, information about schooling arrangements is of primary importance and everything else revolves around that.

Ninety percent of Singaporean organisations interviewed were most reluctant to permit expatriates to be accompanied by children aged between 5 years and 18 years. Senior executives in these organisations believe that an overseas posting between these ages directly interferes with the expatriate's productivity and the children's education because facilities overseas are not adequate to ensure the proper development of the child.

“Very important with educational allowances given to the family depending on the facilities on the posting overseas.” (HRD, Singapore Bank, Singapore)

“Depending on the country overseas, the partner is encourage to educate the children and we give special allowances for correspondence lessons and tutorial help for the partner.” (HRM, Petroleum Multinational, Australia)

4.2.3.5. Family Motivation to Go Overseas

The motivation to go overseas, expressed by 18% of respondents as an important aspect of selection criteria, was particularly valid when both parties were involved and looked upon the move as an exciting opportunity to be involved in a ‘joint venture’ overseas.

Table 38: Family Motivation to Go Overseas

N=9 (18% of total respondents)

Respondents understood family motivation to go overseas as:

	Responses
Must be motivated to make overseas a success	2
Sometimes we can’t and sometimes we don’t involve the family but to motivate, we should involve the family every time	1
Family motivation to experience another culture is an important indicator to success in the assignment	2
To motivate, involve the family in seminars, meetings, talks, etc as much as possible	1
Realistic family allowances motivate the partner, family, and expatriate	1
Motivate the partner by understanding his or her needs fully, accommodating these needs and keeping in close contact Empathy is crucial	2

“Very important and we could be a lot smarter in the interviewing, meeting, and communicating process. Sometimes we cannot and sometimes we do not involve the family, but we should involve the partner and family in difficult posting situations like, for example, Nigeria.” (HRM, International Bank, Australia)

4.2.3.6. Spouse Participation

Eight organisations out of the fifty interviewed (16%) held the view that spouses should be encouraged to participate in the company's communication process, in decision making, particularly, regarding dual-career issues, housing, schooling, facilities for children as well as in the overall relocation process of packing, shipping, and moving.

Table 39: Spouse Participation

N=8 (16% of total respondents)

Respondents understood spouse participation as:

	Responses
Important and should be consulted and allowed to participate in the move regarding housing, children, schooling, & dual-career	2
We encourage spouse's participation in improving accommodation overseas	2
We endorse partner initiatives about job, employment, correspondence courses, activities overseas to keep busy	2
We listen to partner and try to accommodate their suggestions	2

An informative, relevant remark from the human resource manager of a well known, Australian based, multinational, engineering company with branches in Africa and South East Asia said:

"We consider the partner and family contact to be very important in the selection process. We would frequently ask the ingoing manager 'How do you think your family will fit in?' and 'How will they feel about it?' We should also be asking the spouse these questions. It should be a joint decision making process."

Two further relevant quotes from interviews are:

"Family motivation to experience another culture is an important indicator to success in the posting overseas." (Human Resources Director, Consulting Company, Singapore)

"It is absolutely important to involve the family in seminars, meetings, and get together if coming to Sydney HQ. If not, contact by phone and go through in detail."
(Human resource manager, Telecommunications Company, Australia)

4.2.3.7. Isolation and Poor Communication

The interviews on the selection process overall showed that human resource managers, for the most part, were trying to develop either in-house or externally through consultants, more sophisticated methods of selecting staff in overseas work.

Table 40: Poor Communication

N=2 (4% of total respondents)

Responses from partners were as follows:

	Responses
Very important to communicate, to be empathetic	1
Very few are frequently consulted/asked as support is inadequate from head office Partners really want to get involved and be communicated with Very few provide correspondence courses or internet access	2
'Out of sight, out of mind' very prevalent	1

Even multinational organisations such as banks, oil companies, and airlines with years of experience in recruiting expatriates indicated during the interviews that they were not (or not wholly) satisfied with the effectiveness of the selection criteria they were using.

The responses suggest that technical criteria are still uppermost in the minds of the decision makers about who goes on international assignments; a view which is underlined by the finding of the present study.

The interviews confirmed that many such decisions often are rushed and forced through by short-term manpower needs.

In this research almost 80% of Human Resource respondents replied that their organisation cited skills as the most important consideration in selection. A candidate's personality traits, adaptability, family and partner issues were given lower priority.

"Out of sight and out of mind, is a common fault regarding the family and the expatriate in this organisation." (HRM, Automotive Manufacturing Company, Australia)

The interviews revealed that very senior managers, such as the CEO play the primary selection role, together with the Line Managers in the country of origin and Line Managers in the destination country. Human resource managers identified senior managers and functional managers playing the most significant role in the selection process. The Human Resource Department's value is in providing pre-departure services to expatriates and their families and in that role Human Resources is successful as expatriates are given a wide variety of support. Human resource managers argue, however, that they would be equally successful if given the opportunity to be partners with senior and line managers in the selection process of employees for overseas postings.

4.3. Organisational Training of Expatriates

The second of the five major research questions to be analysed in this study is “*What measures do organisations use in the training of expatriates for overseas postings?*”

Two sub-questions evolved from this major research question, viz.:

1. What training activities do you provide for managers before they go overseas?
2. What training do you provide for the partner/family before going overseas?

4.3.1. Pre-departure Training Activities for Managers

The following two Figures, 16A and 16B, show firstly the range of measures taken by management to train expatriates prior to overseas assignments and secondly the training/assistance provided for the partner/family prior to going overseas.

Figure 16A: Training Provided for Expatriates Prior to Overseas Assignment (Number of Companies)

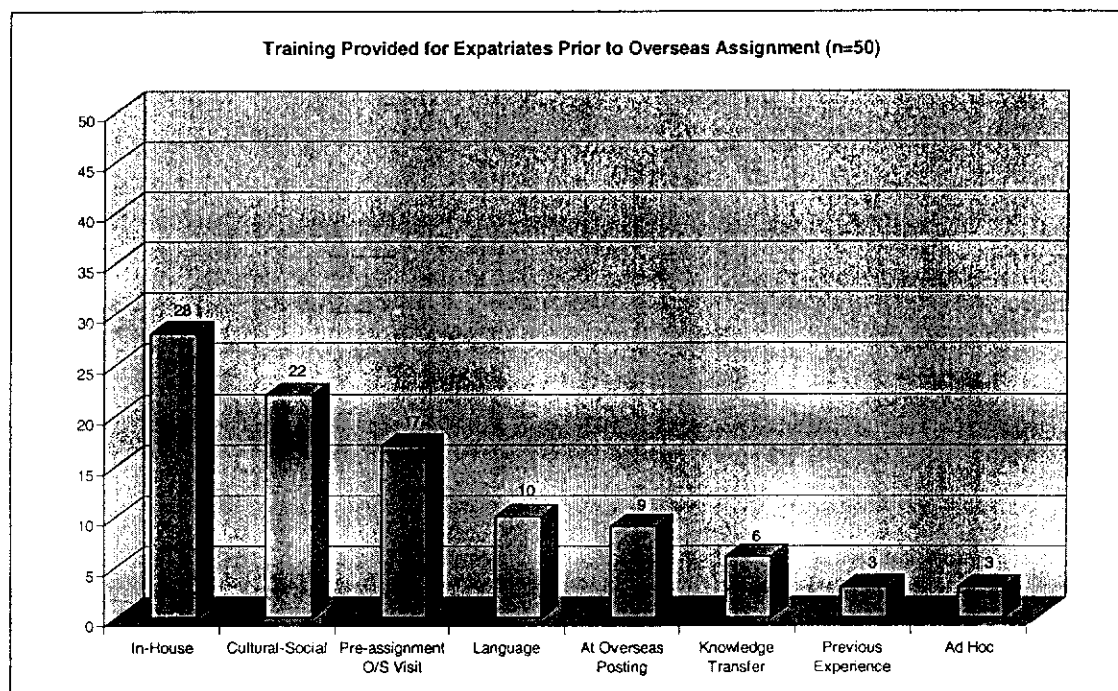
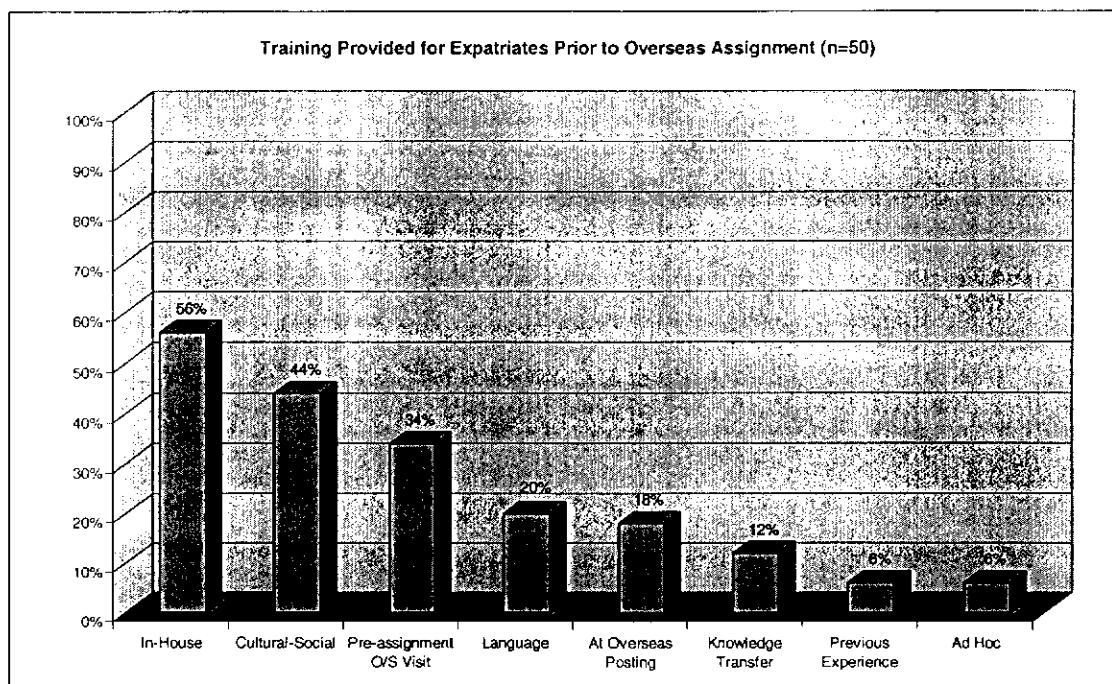


Figure 16B: Training Provided for Expatriates Prior to Overseas Assignment (Percentage of Companies)



4.3.1.1. In-House

Twenty-eight organisations (56 percent) out of the fifty interviewed responded that in-house training was used which included interpersonal and documentary information as well as socio-political, economic, legal, and general living conditions of the host country. Videos, films, and, in the case of eleven organisations, outside consultants were used in the training programmes.

Table 41: In-House

N=28 (56% of total respondents)

In-house training was described by respondents as:

	Responses
Training about geography, politics, company culture, objectives, etc	3
Programmes using experts internally & externally over several weeks	5
Acculturation/in-house training given if required (very experienced expatriates)	5
Utilising our experienced staff	5
Younger personnel provided with mentor	2
Using career expatriates (Western educated & Asian nationalities)	1
Providing briefing packs – incumbents encouraged to contact colleagues or managers in host country	1
No formal training given	
Cultural briefings and seminars	2
Extensive 2-3 months training	2
Very extensive 6-12 months training	2

“Our programmes are all in house projects using experienced staff from the particular overseas regions.” (HRD, Multinational Food Company, Kuala Lumpur)

4.3.1.2. Cultural-Social

Cross-cultural training conducted by repatriates in 12 organisations and by outside consultants in 10 sometimes jointly with repatriates, fostered an understanding of the host country’s culture, history, and heritage so that the expatriate could function accordingly.

Table 42: Cultural-Social

N=22 (44% of total respondents)

Respondents understood cultural-social training as:

	Responses
External training on culture, customs, society, language, etc	5
Acculturation programme from specialised consultants plus our own staff	5
Already very experienced engineers but cultural programmes arranged where applicable	2
Younger, less experienced staff provided with mentors Cultural, social etiquette seminars by our own experienced staff from that country	3
Visit the country for one or two months and be briefed on culture/customs/etc	5
Cross-cultural exposure given for difficult postings eg. Burma, China, India, etc	2

The findings reveal that cross-cultural training provided the newly assigned expatriate with some understanding of the ways of doing business in the country of assignment.

The research findings revealed, in the case of fifteen respondents, that cultural-social training allowed expatriates and their partners to adjust more readily to their new surroundings. Adjustment and the resulting feeling of comfort had a positive impact on the international manager's effectiveness.

Another finding from the research transcripts is that culture training's relationship to task performance is strong and cultural training also benefits and enhances performances in the new work setting.

"Overseas training is given when expatriates arrive in our international subsidiaries." (HRM, Petroleum Company, Singapore)

"Cultural preparation, language training and spouse support is given for difficult postings; e.g., China, Laos and Cambodia." (HRM, International Bank, Australia)

4.3.1.3. Pre-Assignment Overseas Visit

Seventeen organisations (34 percent) interviewed confirmed that overseas visits were an important part of their training schedules for new appointees.

Table 43: Pre-Assignment Overseas Visit

N=17 (34% of total respondents)

Respondents understood pre-assignment overseas visits as:

	Responses
Potential candidates going overseas for several weeks and assessed on return for likes/dislikes etc	2
Staff who select expatriates to go overseas for weeks/months to that particular country Briefed by locals & resident company people overseas	5
Partner & expatriate see the country to be lived in prior to accepting the posting	5
Moves to motivate expatriates to go overseas	5

In answer to the question: “*What training activities do you provide for managers before they go overseas?*”, samples of replies were:

“*Would visit the country for several weeks and be briefed on the role, the job, the culture, and the politics.*” (Personnel Director, Multinational Construction Company, Australia)

“*In-house briefing and visit the site before going on a permanent basis.*” (HRM, International Trading Company, Singapore)

“*Send potential candidates for two weeks and assess them on return for their impressions or feelings.*” (HRD, International Projects Company, Australia)

4.3.1.4. External Training

The research found that smaller organisations with limited staff and training facilities used external training regularly while larger multinationals used their own expertise and the assistance of external consultants jointly.

Table 44: External Training

N=13 (26% of total respondents)

Respondents understood external training as:

	Responses
External training on culture, customs, society, and language	3
Acculturation programmes and outside expert help from consultant	5
Compulsory pre-departure briefings intensive one day or 3 days using people from relevant country or organise telephone hook up for 1 hour meeting, etc	1
Our business is very client driven so we appoint people in accordance with our client requirements so external training might be required	2
In-house training in international banking and outside training for culture, customs, language, etc	2

“Compulsory pre-departure briefings of at least one day long for individuals or three days for groups using inpatriates and experienced consultants.” (HRM, Federal Government Department, Australia)

4.3.1.5. Language

Foreign language ability was considered vital by twenty percent of organisations.

Knowing the verbal and non-verbal language of the host country reflected interest in the country and its culture and helped in generating the chance to develop a training climate.

Table 45: Language

N=10 (20% of total respondents)

Respondents understood language training as:

	Responses
External training on language, culture, customs, society, etc	2
Language training for partner & expatriate	2
TAFE evening classes underwritten by company or language school	2
Cross-culture, country knowledge, language if applicable	1
Staff move around constantly as we are a multinational organisation so language knowledge valued	1
Fluent language essential for postings ex Singapore/Malaysia to China, India, or Indonesia	2

Managers interviewed in Singapore and Malaysia whose expatriates were, in many cases, bilingual and sometimes trilingual (fluent in English, Mandarin, Malay/Indonesian) were strongly in favour of the importance of language ability while Australian managers favoured at least some understanding of the language and ability to speak conversational language in the host country.

Training the incumbent manager at the overseas post using local experts as well as the 'returning manager' was used by nine organisations. Knowledge transfer, as well as the previous experience of the outgoing manager, were additional benefits in the training of expatriates overseas.

"We are a multinational company and we move staff around constantly to give them exposure to different languages, cultures, customs and countries. We encourage our staff to learn languages and reimburse them for tutorial expenses." (HRD, Automotive Parts Manufacturing Company, Australia)

4.3.1.6. Training Provided at Overseas Posting

Nine organisations (18 percent) interviewed regarded training overseas as an essential "follow-on" from home country training prior to departure. The benefits of an overseas mentor in the case of young and or inexperienced expatriates were considerable.

Table 46: Training Provided at Overseas Posting

N=9 (18% of total respondents)

Respondents understood the above as:

	Responses
Younger, less experienced personnel are provided with mentors at overseas sites also seminars given by overseas personnel at head office before departure	2
Overseas training is given in our international operations by overseas staff	2
Introductory assistance/counselling is given in each of our multinational offices to incoming personnel	2
Training continued overseas by specialised staff	2
Senior management have ongoing training scheduled each year for a month in different overseas locations/offices	1

The advantage of training programmes conducted by local, in country, experts often jointly run with the outgoing manager were helpful and well received and frequently included the newly arrived partner and family.

“Our offices in different countries are in constant communication and assist incoming managers and expatriates with introductory assistance and cultural introductions.”
(Director, Human Resource Consulting Company, Australia)

4.3.1.7. Knowledge Transfer from Outgoing to Incoming Personnel

12 percent of organisations interviewed stressed the importance of a thorough hand-over process, sometimes as lengthy as six weeks, between the outgoing manager and incoming expatriate. Executives from both Australian Federal Government and State Governments interviewed, confirmed that detailed handovers and ongoing training were standard practice in these organisations.

Table 47: Knowledge Transfer

N=6 (12% of total respondents)

Respondents understood this as:

	Responses
Outgoing-ingoing exchange during handover of several weeks, which is essential in difficult postings	3
Using repatriates overseas knowledge and leadership skills on return from overseas assignments	1
We insist on 6 weeks handover with outgoing person	2

"We insist on a sound handover from outgoing expatriate of six weeks with outgoing person in touch with home office regarding his or her future position." (HRD, Federal Department, Australian Government)

4.3.1.8. Previous Experience

Due to the specialised and frequently hazardous nature of mining and petroleum occupations, human resource managers interviewed stipulated that previous experience was essential and current, up-to-date training a pre-requisite to employment overseas.

Table 48: Previous Experience

N=3 (6% of total respondents)

Respondents understood this as:

	Responses
Frequently we look for experienced trained people to fill postings urgently due to our dynamic business	2
Change is quick to come about so well experienced people are sought out with no necessary training required	1

"We look for well trained people with overseas exposure who do not require to be trained." (HRM, Geological Company, Australia)

"Previous experience and knowledge are essential as the job is specialised and hazardous" (Senior Personnel Officer, Petroleum Exploration Company, Singapore)

4.3.1.9. Ad Hoc Situations

Three organisations responded that training, though important, was frequently not possible due to the dynamic nature of the job or not necessary, as the expatriate should have the necessary experience to do the task overseas.

Table 49: Ad Hoc Situations

N=3 (6% of total respondents)

Respondents understood the term 'Ad Hoc situations' as:

	Responses
Frequently a tap on the shoulder without any training or preparation as organisations are dynamic and emergencies come about	1
Specific training in emergencies	1
Training is required but there are large discrepancies between what the human resources people said they gave and what the expatriates said they received	1

"Training in customs, culture and language is offered but is not compulsory. Take it or leave it." (HRM, Gold Exploration Company, Australia)

"Ad hoc. If time permits prior to departure, training in customs and culture can be made available." (CEO, Multinational Recruiting Company, Australia)

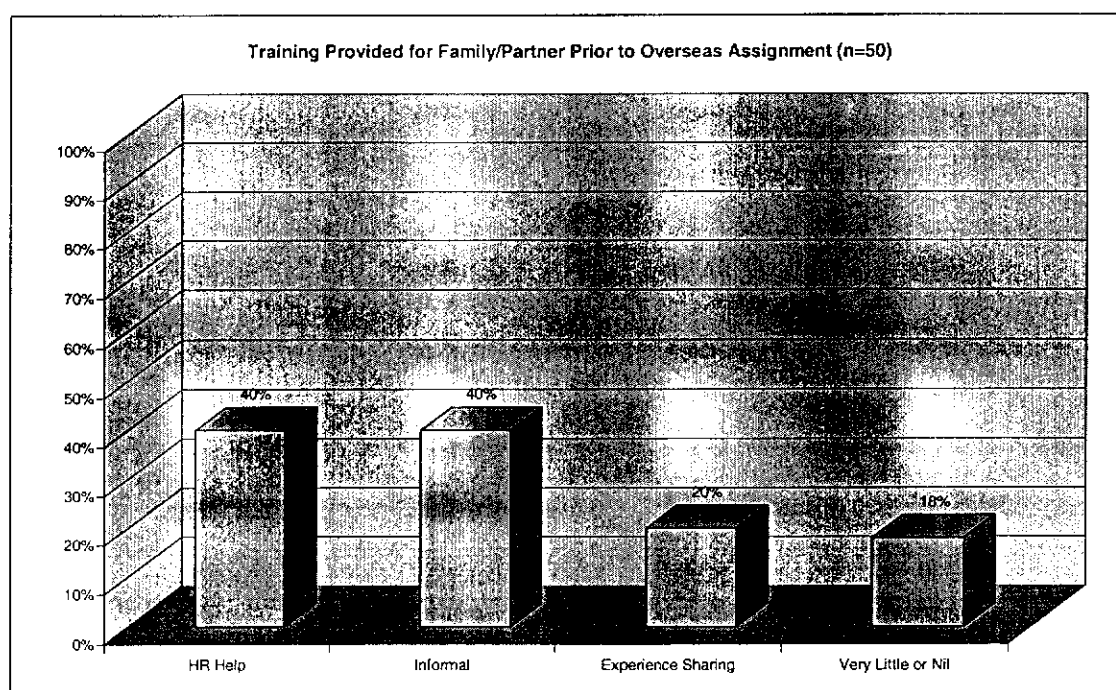
4.3.2. Pre-departure Training for Partners/Families

As can be seen in Figure 17A and Figure 17B, no formal training is conducted; but, 40 percent of multinational organisations and government institutions were quick to add that their human resources department assists the partner and family in introductory 'seminars' and discussions on matters such as accommodation, communication, health, culture, cost of living, society, and region. However, few organisations appeared to bother with briefings or preparation of any thoroughness for the accompanying families of international staff.

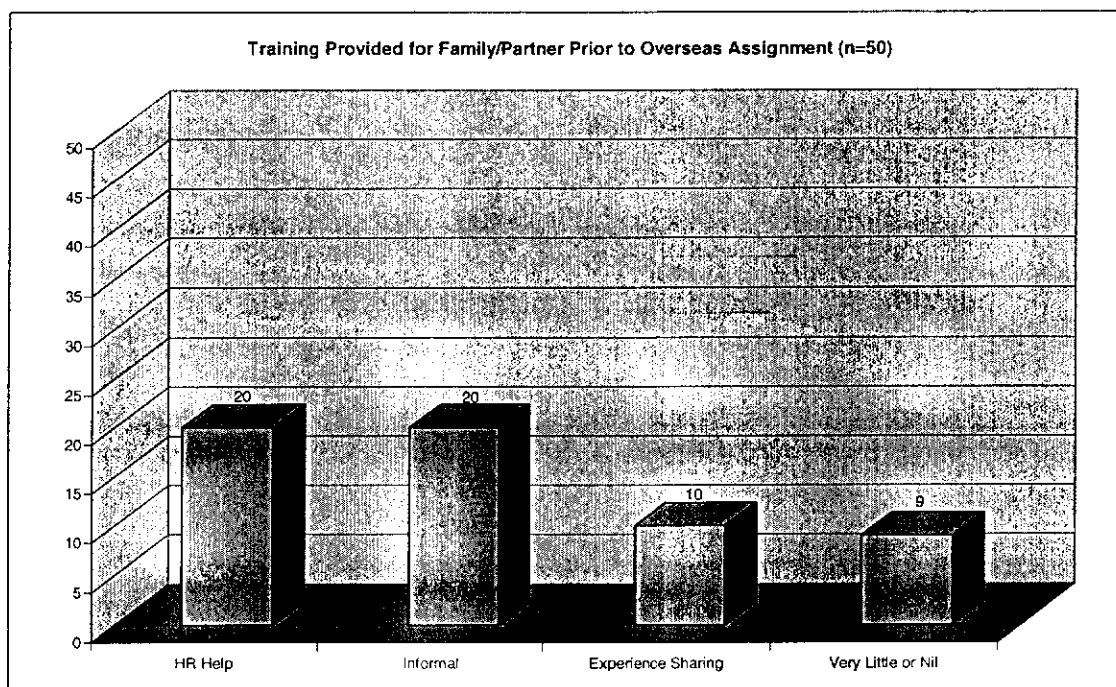
“Nothing formal, but, HR will assist with information regarding accommodation, culture and customs if requested by partner and family. Otherwise, we brief the expatriate with these details.” (HRM, Mining Exploration Company, Australia)

“HR Management assists the partner and family in introductory seminars about the posting, region, culture, society and customs. Cost of living and accommodation is also discussed as our aim is to help wherever possible.” (HRD, Multinational Production Company, Australia)

**Figure 17A: Training Provided for Family/Partner Prior to Overseas Assignment
(Number of Companies)**



**Figure 17B: Training Provided for Family/Partner Prior to Overseas Assignment
(Percentage of Companies)**



4.3.2.1. HR Help for Partner and Family

The Human Resource Department assists the partner and family with introductory seminars, acculturation programmes and on matters such as accommodation facilities, cost of living and communication. Few organisations, however, conducted official preparatory programmes for the partner and family.

Table 50: HR Help

N=20 (40% of total respondents)

Respondents understood HR help as:

	Responses
Human resources department offers assistance and encouragement and motivation/counselling to family & partner	1
Human resources assists in detail to queries on education and/or accommodation We try to motivate the family prior to overseas posting	3
Most companies went out of their way to meet the spouse of the incumbent if proximate to head office or place of appointment	2
Spouse support is important children's education overseas	1
Jobs for partners are looked at seriously by human resources department, particularly in dual career situations	1
Human resources keeps in touch with expatriate & family in multinationals, however, smaller organisations are not good communicators with families	2
Nothing formal, but, human resources can assist if asked	3
Partners are involved in where to live in the region/town/city	1
Senior management selects the expatriate in the final analysis So human resources has a say but not a big say in family	5
We provide strong communication links while away from Australia overseas	1

"Our Human Resource people will endeavour to assist with information about culture, customs and accommodation prior to departure." (HRM, Multinational Computer Company, Australia)

4.3.2.2. Informal Training for Partner and Family

Although no formal training was offered to the partner and family, organisations were intent on attending to the needs of the family particularly in difficult posting situations such as Africa and China.

Table 51: Informal Training

N=20 (40% of total respondents)

Respondents understood this as:

	Responses
No training but encouraged to attend seminars with expatriate partner	5
Advice given if asked	3
Nothing formal	3
Informal briefing with expatriate partner	4
Human resources will assist in accommodation, customs prior to departure	1
No formal training but human resources emphasise supporting expatriate and his/her career path stressing promotional aspects	1
We do listen to the needs of the partner/family and try to act on them	3

“No training as such but welcome to attend pre- departure briefings with expatriate”
(Personnel Officer, International Trading Company, Singapore)

4.3.2.3. Experience Sharing Between Outgoing Family and Ingoing Family

The outgoing family sharing and discussing their experiences and problems with the ingoing family was seen as a valuable contribution to the settling in process of a family to the new country.

Table 52: Experience Sharing Outgoing-Ingoing

N=10 (20% of total respondents)

Respondents understood this as:

	Responses
Outgoing-ingoing exchange essential for a successful entry to new country	5
Meetings are arranged by company human resources director	
We appoint a mentor to welcome, introduce family, spouse to new city/town/region in rentals, shops, clothing, food, customs, etc	5
Partners motivated to be in constant touch with homebase, mentors, etc	3
Meetings encouraged in company (which is a family tight community) for partners families to learn about postings	2
As we are multinational, our offices have specially trained PR people to assist incoming (and outgoing) families	5

“Arrange, where practical, for outgoing partner/family to meet ingoing partner/family for information sessions.” (HRD, Multinational Food Production Company, Kuala Lumpur)

“We try to motivate the family and keep them in constant touch by appointing a mentor from an outgoing family to assist with problems and queries” (HRM, State Government Department, Australia)

4.3.2.4. Very Little Training or None at All

Smaller workforce organisations tended to offer little or no training prior to departure overseas for partners and family. Specific assistance was given if requested.

Table 53: Very Little Training or None at All

N=9 (18% of total respondents)

Respondents understood this as:

	Responses
Nil training but any questions will be answered on demand	3
Nil but it is a concern	2
Very little in Australia/more extensive in USA	2
Nil (and no concern)	2

“Very little training is provided, but, it is a concern and we are taking steps to improve.” (HRM, International Insurance Company, Australia)

“No training, but, HR Directorate in Singapore and Kuala Lumpur will answer any questions from partner.” (HRM, Telecommunications Organisation, Singapore)

4.4. Factors Relating to Repatriation and Career Planning

The fourth major research question of this thesis is: *“What factors relate to the repatriation process and career planning?”* and to answer this, two sub-questions were asked during the interview process:

1. Do you provide any re-entry training or support on return to the organisation?

2. How long do employees usually stay after they return home?

The answers to both of these survey questions will be reported in this part of Chapter Four.

4.4.1. Re-entry Training or Support by the Organisation

Forty-six (92%) human resource managers interviewed replied that their organisation handled repatriation poorly and inadequately. The results of the interviews revealed that despite the significant costs associated with overseas assignments, few companies try to take advantage of the repatriated employee's enhanced skills and experience.

The analysis revealed no clear line of responsibility for the expatriate in the repatriation process, nor with a defined role for the organisation's human resources department in the selection or support on return of employees. In 72 percent of cases, line managers had the initial say in the appointment of the overseas person with human resources department involvement in only 40 percent of all cases.

It was common for the employees to be sent overseas first by line management and then to pass the responsibility for their well-being over to the human resources department with minimum involvement by human resources in their selection or repatriation.

Little re-integration of the expatriate into the organisation took place; for example, debriefing seminars, welcome back procedures or validation of their experiences.

Only 11 percent of human resource managers said that employees in their organisation had a structured, formal, debrief and even when there was one, very little attention was given to newly acquired skills.

As a result of this, repatriates reported a negative impact on their work productivity in the first twelve months of return. .

The results indicate a lack of suitable strategies for managing employees on overseas assignments both while they are overseas and when they return. The analysis also identifies seven detrimental issues or problem areas concerning the repatriation process that need to be addressed and these are:

1. A sink or swim (no planning) attitude by Senior Management.
2. A return by the repatriate to the same (or worse) position on completion of the assignment.
3. Finding a relevant position in the company on return.
4. No (or minimal) re-entry counselling.
5. Family stress on return.
6. Early termination of contract.
7. Culture shock on return.

4.4.1.1. 'Sink or Swim' Attitude

Respondents answers showed that inadequate support and insufficient planning are given to the repatriation process both by companies generally as well as government departments.

Table 54: ‘Sink or Swim’ Attitude

N=33 (66% of total respondents)

Respondents understood this as:

	Responses
No serious thought to the expatriate’s career path in the selection	5
The employer and the expatriate agree on a 2 or 3 years contract and on completion, the repatriate uses the skills learned overseas to look for other employment	5
An overseas assignment positions are in the global marketplace and I accept the risk of no return job due to the overseas experience gained	3
The skills learned overseas may not now apply to the domestic market which is very dynamic Some expatriates, because of this, are unemployed on return	3
There is no pressing issue because people who leave, leave to go to another mining company on repatriation	1
The person returns and they don’t know where they stand – experiences the sensation of falling off a cliff!	2
No formal support on return If job well done, there is an opportunity for further overseas postings	1
A hit and a miss situation – our record of keeping expatriates is dismal	1
Overall not well handled	1
No real thought given to what the expatriate will do in 2, 3, or 4 years on return as the market is very dynamic & unpredictable in Singapore	3
Human resources department takes repatriation seriously however senior management are not prepared to take repatriation responsibly	5
Inadequate support/insufficient planning is given to this area by government and companies generally	4

The following interview comments from senior management and human resource managers illustrate some of their concerns regarding these seven problem areas:

“In theory we have a succession planning system for repatriates but in practice, it refers to only a few chosen people who are approached by management or who go out of their way to curry favour with management. Career paths are political and this is a real problem for company people who have been overseas for several years. Our recent merger resulted in a number of repatriates being made redundant or taking redundancy packages.” (Human Resource Manager, Exploration Company, Australia)

“An assignment can be completed successfully without repatriation assistance to follow. However, that person may then hesitate to accept another overseas

assignment. Also confidence in the organisation would be lower. Assistance is therefore very important for successful repatriation.” (Human Resource Manager, Mining Company, Australia)

4.4.1.2. Repatriates Returning to Same or Worse Position

Promotion on return from the overseas posting, perhaps not specifically promised by the organisation, is expected and if this does not materialise, the repatriate is dissatisfied and leaves as soon as possible.

Table 55: Repatriates Returning to Same or Worse Position

N=23 (46% of total respondents)

Respondents understood this as:

	Responses
Sometimes not possible to return to better position or even same position If similar or less qualified position offered, the repatriate looks around for another job	5
Debriefing session of a few days, however no guarantee of a higher position and often repatriate is unhappy on return	3
Reverts to old position until skills learned overseas can be used eg. international banking	2
No guarantee of any position	3
Promise given of job back on return (to Singapore)	2
No promise of promotion given	1
Young graduates are employed or asked to go overseas on contract of 2-3 years No guarantee of job after return	2
Promotion on return is not promised, but is expected and if not, the repatriate leaves as soon as possible	5

“I think where the problem lies in our department is slowness of people being able to get a position. They assured me of a position but I had to hang on for 4 months waiting for a position to come through. So you hang around wasting time. They could have planned it better so that when I got back after debriefing, I had a job to go to. I think companies really need to look at that and take advantage of skills that have been accumulated because they’ll leave and they’ll move on.” (Human Resource Manager, State Government Department, Australia)

4.4.1.3. Finding Relevant Position in Company

Suitable positions for the repatriate are frequently difficult to find on return and some companies are now continuing personnel for overseas postings with no obligation on either side to continue employment after the overseas assignment.

Table 56: Finding Relevant Position in Company

N=19 (38% of total respondents)

Respondents understood this as:

	Responses
Average stay on return is 6 months and looks again at overseas position	3
No relevant position Contract is 2 or 3 years and finishes with no obligations on either side	5
Our international subsidiaries are popular with expatriates who want to extend their stay overseas and not return to uncertain jobs in Australia	1
Young expatriates employed either internally or externally (foreigners) for 2-3 years contracts with no obligation afterwards	2
Nothing in writing promised on return from overseas	3
We try but normally not successful so go elsewhere	5

“One of the biggest challenges we have is this problem of repatriation. After a person has been in a managerial position, in a leadership position, has learned the language of a country, and returns to head office, it is like falling off a cliff – they don't know where they stand. They have been away for two years and are not ‘au fait’ with the home situation and feel at a loose end. They feel they have come back to very little and the company appreciates their feelings. We try to individually help, individually counsel, individually assist as best we can but it is a problem. The average person would tend to look around for a few months, maybe join another organisation that would send him – it is mostly him – or her abroad, overseas on another posting. It is a problem.” (Human Resource Manager, Large Project and Construction Company, Australia)

4.4.1.4. No Re-Entry Counselling

Forty-eight percent of respondents answered that little or no re-entry counselling was offered to employees on their return from overseas postings. However, most agreed that insufficient attention is given to this important area.

Table 57: No Re-Entry Counselling

N=24 (48% of total respondents)

Respondents understood this as:

	Responses
No formal debriefing on repatriation	5
No re-entry training or counselling at all	5
Insufficient attention is given to this area	5
We admit that we put more effort into going than into returning	3
No training or counselling which is formal	3
Repatriates given a one off repatriation allowance and two days leave on return from overseas	
Expatriates are expected to keep abreast of home office movements so that re-entry is minimum stress	3

It is also important for the repatriate to be given a position relative to his new overseas experience and one which is challenging and fulfilling and this next comment illustrates this:

“You often find that expatriates have the experience of independence, of being involved with very high level people and I think the challenge for any organisation is to tap into these new skills and make sure they are not lost. I think most organisations and we fail to do that.” (Human Resources Director, International Airline, Australia)

As this Human Resource Manager says, repatriation is a challenge, and challenges can be interpreted as opportunities to overcome problems such as those described in the above statement and in the following comment:

“I don't think companies really think about it hard. Repatriating people back is a major problem and I don't know that there is a simple answer to it but it is something that needs to be given thought to and you need to be alerted to well in advance. Most people who work for us and who have come back have been disappointed and have taken their time to find their niche.” (Human Resource Director, Federal Government Department, Australia)

4.4.1.5. Partner and Family Stress

Half of the respondents interviewed reported that in the case of their accompanied employees, partner and family stress occurred and it is necessary to give extra support and consideration to counteract stress.

Table 58: Family Stress

N=25 (50%)

Respondents understood this as:

	Responses
The selection of married personnel is carefully considered because marriage breakups tend to be commonplace among unaccompanied married employees	3
Frequently expatriates remain overseas resulting in break-up of marriage	5
Separation and divorces occur in 1/5 instances and we have over 40 expatriates overseas	2
Separation/divorces are as high as 18%-20% in the mining industry	5
We experience spouse problems particularly in difficult postings eg. India, Bangladesh, resulting in family returning or early return of expatriate	5
Dual-career is a source of stress and results in a bored partner and early return of both	5

“It is important to give and receive a lot of support and assistance during this transitional period of returning home, particularly as the work and social environment have changed. Coping with assimilation, without assistance from the company or human resources, particularly in the case of the individual’s family often ends up with a strained relationship, poor reconciliation, and an unhappy departure from the company.” (Human Resource Manager, Banking, Singapore)

4.4.1.6. Early Termination of Contract

Twenty percent of respondents confirmed that contracts were terminated early due to firstly partner and family problems and secondly to dual-career partners where the expatriates partner wanted to return home to take up his or her career.

Table 59: Early Termination of Contract

N=14 (28%)

Respondents understood this as:

	Responses
Early returns or recall to home office	3
Spouse problems resulting in expatriate returning early	5
Dual-career couple wanting to terminate contract	5
We lose very few people through early return from overseas, but, we centralised in Melbourne and lost employees from other states who are not willing to relocate on return from overseas	1

4.4.1.7. Reverse Culture Shock

Culture shock on return from overseas, particularly, if the posting has been an extended one, can be as traumatic as the shock of being posted initially to a different culture. Shorter assignments overseas and re-entry counselling can assist to cope with reverse culture shock.

Table 60: Reverse Culture Shock

N=10 (20%)

Respondents understood this as:

	Responses
Reverse culture shock is a serious problem with the family as well as the expatriate	5
12-18 months (shorter) assignments make reverse culture shock easier to cope with	5

Cross-cultural and communication skills learned by the repatriate are also crucial to the mentoring of new expatriates for future successful programmes overseas as the following comment shows:

“It depends what the job is. I mean if you have got a mine manager who goes to Mount Newman, it’s different to a mine manager who goes to Guyana and comes back. We need to make sure that those cross-cultural and communication skills as well as technical skills are not lost. Maybe we could do this better.” (Human Resource Manager, Geological Project Company, Australia)

The last two interview comments from human resource managers in Singapore and Kuala Lumpur make a lot of sense and are a logical approach to the repatriation process:

“The repatriation issue should be addressed before the person goes overseas. It should be discussed as part of the decision making process as to whether they go or not. The positives e.g. salary increases, tax incentives, new skills, etc as well as the negatives should be addressed. On return, we can’t just turf out that person who has filled the expatriate position. There may or may not be a job on return. The decision whether to go should be made on that basis. All the facts should be put in front of the person so they can make their decision knowingly.” (Human Resource Director, Finance Company, Singapore)

“What is wrong is to make vague promises about what will be done on return and when the individual returns, he or she is not looked after or the person that made the promise is no longer responsible for the decision because he or she has moved on.” (Human Resource Director, Insurance Company, Malaysia)

4.4.2. Positive Issues Concerning the Repatriation Process

Figures 18A and 18B show the positive issues which emerged from the interview, concerning the repatriation of managers on completion of their assignments overseas.

Figure 18A: Positive Issues Concerning Repatriation Process (Number of Companies)

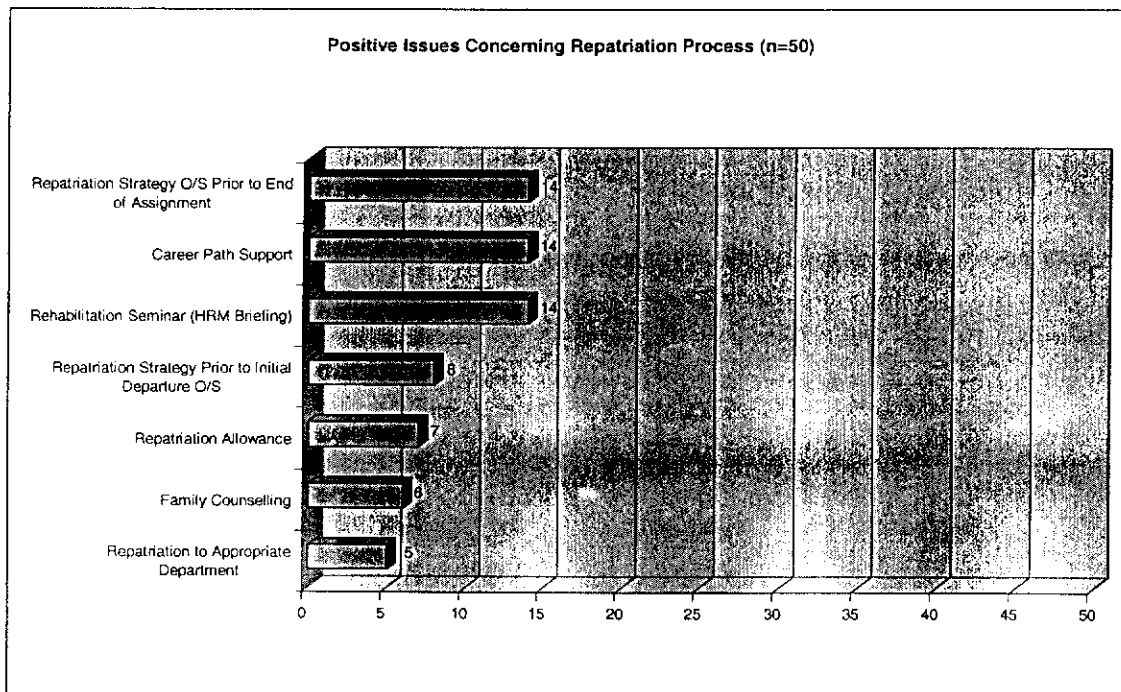
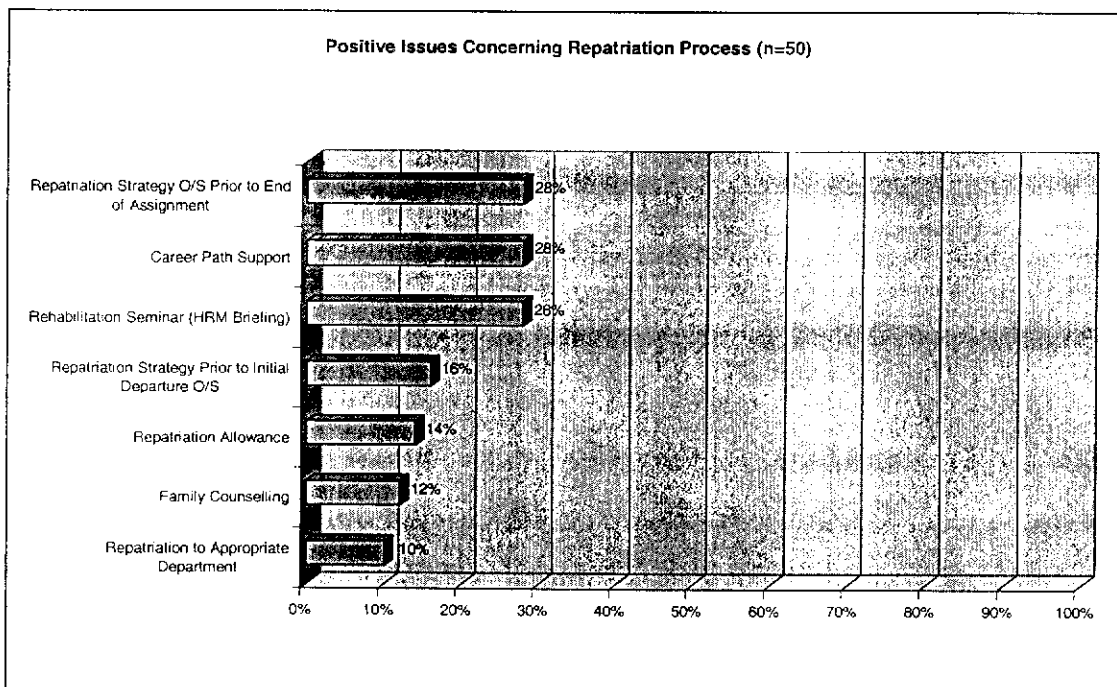


Figure 18B: Positive Issues Concerning Repatriation Process (Percentage of Companies)



Persons from twenty-eight percent of organisations responded that they had in place strategies which prepared the expatriate for his or her return and that these were enacted while the expatriate was still overseas.

The following quotations are examples of these strategies:

“Human resources offers assistance, encouragement, motivation, and counselling to the expatriate and family and visits the site overseas 6 months and again 3 months prior to return.” (Human Resource Director, Petroleum Company, Australia)

“It is the norm to communicate with the employee and family as much as possible as the posting is normally a strategic location with email and telephone communication. We know when they are due home and prepare them by counselling and assistance, in site, before the contract finishes.” (Human Resource Manager, Insurance Group, Australia)

In another twenty-eight percent of companies and organisations, it was confirmed that career support was offered as a positive factor in repatriation as the following four comments demonstrate:

“We value the overseas experience of returning staff so we can normally reposition an employee using his or her Vietnam experience to assist incumbents into Vietnam.” (Human Resource Manager, Airline Company, Australia)

“We try to provide a clear, career-path prior to initial departure which may assure them of a role to play be it on a posting overseas or here in Singapore.” (Human resource Manager, Investment Company, Singapore)

“We try hard to keep expatriates happy to stay on as a career move.” (Human Resource Director, Land Development Organisation, Australia)

“Most make their career with us and we try, to the best of our ability, to keep our staff and use their overseas expertise as much as possible.” (Personnel Director, Large Tool Machining Company, Australia)

Rehabilitation seminars and debriefing are used by 14 organisations (28 percent) as positive approaches to successful repatriation. Eight organisations out of fifty reported that they discussed the situation of the termination of the contract with the expatriate prior to the commencement of the assignment, for instance:

“From experience in other organisations, be upfront with the person before going overseas that no guaranteed promise of a job is to be made on return.” (CEO, Bank, Australia)

“Settle this issue before beginning of the contract and discuss prior to going overseas as there is deep concern over a posting of two to three years and lost job or lack of job opportunities on return.” (Human Resource Manager, Brewery, Singapore)

The researcher found that Singaporean and Malaysian respondents, particularly, were concerned about staff returning and being repatriated well. Interviews with several Singapore government departments and trading houses brought responses such as:

“You have to talk about repatriation before the expatriate and spouse go out.”

“Be honest – if possible give them some direction or likelihood of the job when they return. A lot are not honest. Also ensure the spouse knows the honest situation.”

“Employees are expected to train local staff while overseas, feedback from returned staff is recorded and forms part of our pre-departure training for new expatriates. Returned staff are expected to form part of the training programme for overseas appointments.”

“We are normally able to relocate the repatriate on return to Singapore or offer another assignment overseas if requested and if we see motivation and a job well done on the part of the employee.”

“We pride ourselves on our career paths!”

“We compensate the expatriate for the loss of the income of the spouse by fifty percent of wife’s salary.”

This preoccupation for the well-being of repatriates and their spouses is understandable in view of the importance Singapore management place on an internationally educated pool of manpower and their emphasis on international trade – the life-line of this small island of approximately three million people.

One of the major findings of the research in Singapore and to a lesser degree in Kuala Lumpur was the challenge to secure an adequate supply of expatriates mainly because individual managers were reluctant to undertake the mission. The unwillingness to become internationally mobile is attributed to several factors, including continued rationalisation of industries, takeovers, and mergers which create uncertainties regarding re-entry and repatriation. There is also a strong (and growing) reluctance to disrupt the education of children, the growing importance of quality of life considerations and finally continued uncertainty regarding international terrorism and political unrest.

4.4.2.1. Repatriation Strategy Prior to End of Assignment

Fourteen organisations out of fifty interviewed confirmed that strategies were in place to find suitable positions for returning employees prior to the expatriate concluding the overseas posting.

Table 61: Repatriation Strategy Prior to End of Assignment

N=14 (28%)

Respondents understood this as:

	Responses
We try to find positions in parent company for the repatriate at least 6 months before overseas contract expires	1
Yes, we are in this business of assisting people to repatriate well Every effort is made to try to find a position at a suitable level for the repatriate	2
It is in the expatriate's interest to keep in close contact with home office developments to ensure a position on repatriation	2
Many repatriates, due to new experiences overseas, go into promotional positions in another role in the organisation	3
Before repatriation, the outgoing person has the responsibility to train/appoint several people who could fill his/her role on departure	1
With recent mergers, it is difficult to give a guarantee of suitable positions, however, we have a fund to assist returned personnel for 6 months to resettle into a challenging job	1
Home office staff move frequently around overseas offices and keep overseas staff up-to-date with developments to assist them on return	1
We try to avoid culture shock by a slow transition back into Australia and home office We give leave and counselling	3

"We try to reposition employees using, for example, a person's Vietnam experiences to assist an incumbent expatriate into Vietnam." (HRM, Multinational Transport Company, Australia).

"Support is given to employees, but more could be given to partners and family" (Personnel Officer, International Airline, Singapore)

4.4.2.2. Career Path Support

Respondents agreed that career path support is essential if organisations are to return their experienced expatriates. Only 14 (28%) organisations reported that career path assistance was actually provided by them which is a disappointing figure that needs to be rectified.

Table 62: Career Path Support

N=14 (28%)

Respondents understood this as:

	Responses
Normally able to relocate the repatriate on return to Singapore and offer another overseas position if motivated and if a good job done	2
We try to provide a clear career path prior to departure overseas which will ensure a clear role	2
A career move is given We care about our staff	4
We could do more in this area	5
We try to use their overseas expertise as much as possible	1

“This organisation tries hard to keep repatriates happy, but, could do much more in this field regarding promotion and incentives to stay with the company as a career.”
(HRM, International Real Estate Organisation, Australia)

“We try to provide a clear career path prior to initial departure which may assure them of a role to play be it on a posting overseas or here in Singapore. Employees are expected to train local staff while overseas. Feedback from returned staff is recorded and forms part of our pre-departure training for new expatriates.” (HRD, Government Department, Singapore)

4.4.2.3. HRM Briefing/Rehabilitation Seminar

Briefing concluded either formally with senior management or Human Resource Department through seminars or informally through work colleagues is an important rehabilitation process on return.

Table 63: HRM Briefing/Rehabilitation Seminar

N= 14 (28%)

Respondents understood this as:

	Responses
Debriefing sessions of a few days but no promise given before or after the overseas assignment	2
No training but briefing is important	1
No formal debriefing	5
Currently approximately 40 expatriates overseas HR take a personal interest in all	1
We debrief and support our returnees	3
After 2 months back, we offer rehabilitation courses, counselling and psychological support	2*

*) This organisation's policy is to allow the repatriate to settle down and after 2 months offer rehabilitation and counselling.

"No formal assistance or support is given, but, various briefings by the Chief Executive Officer or Senior Human Resource Manager to update the returned officer are conducted." (HRM International Trading House, Singapore)

"Good support systems and extensive de-briefing are conducted in this organisation." (HRD, International Land Development Company, Australia)

4.4.2.4. Repatriation Strategy Prior to Initial Departure Overseas

Only a few organisations (16%) responded that repatriation, prior to the start of the overseas posting, was given serious consideration. Those that did discuss this important issue emphasised the importance of honesty and frankness with the incumbent expatriate to avoid future misplaced expectations, misunderstanding and disappointment at the conclusion of the overseas posting.

Table 64: Repatriation Strategy Prior to Initial Departure Overseas

N=8 (16%)

Respondents understood this as:

	Responses
You have to talk about repatriation before the expatriate/spouse goes out Be honest	3
Ensure spouse knows the honest situation A lot are not honest!	2
We try to give the picture before going and try to repatriate well We are frank about the situation	2
We compensate the expatriate by 50% of wife's salary in dual-career situation	1

"We discuss repatriation with the expatriate prior to going overseas as there is deep concern over a posting for two or three years and the possibility of a lost job on return." (Senior Personnel Officer, Multinational Trading Organisation, Australia)

"Be upfront with the employee prior to departure overseas that no promise of a job is going to be made on conclusion of the contract." (HRD, Mining Company, Australia)

4.4.2.5. Family Counselling

While six organisations (12%) reported that family counselling was an important part of their repatriation process, the practice is not used in the majority of companies.

Table 65: Family Counselling

N=6 (12%)

Respondents understood this as:

	Responses
HR department offers assistance, encouragement and motivation/counselling to the partner & family	2
We offer counselling if required or if asked	1
Support is given to expatriate but little to family or partner	1
We could do more communicating with families	2

"We try to avoid culture shock by a slow transition back into the Australian and home office environment." (HRD, Petroleum Multinational Corporation, Australia)

4.4.2.6. Repatriation to Appropriate Department

As discussed in 4.4.1.3. above, finding a relevant position for the repatriate or placing the repatriate in the most appropriate department is a challenge to the management of the organisation. Forecasting and planning can avoid this situation.

Table 66: Repatriation to Appropriate Department

N=5(10%)

Respondents understood repatriation to the appropriate department as:

	Responses
Where possible a repatriate, for example from China, would work at the China desk/section of the company	2
Repatriate can look forward to training, advising, mentoring people chosen to go to that particular region	3

"If you are good at your job and make a success of the overseas assignment, the company will try to relocate you, but, no promises are given and none should be expected." (HRM, International Finance Company, Australia)

"Where possible, an expatriate returning from China would work at the China desk which is ideal because experiences in that area can be put to good use and a sound mentoring programme can take place" (HRD, International Engineering Group, Singapore)

4.4.3. Employees' Length of Stay After Return

Question: *"How long do employees usually stay after they return home?"*

Table 67 presents sobering facts on the length of stay of experienced, valuable and expensive repatriates on conclusion of the overseas posting and return to their home organisations. Chapter Five of this study will analyse these figures and Chapter Six will recommend steps to promote successful careers within organisations.

Table 67: Employees' Length of Stay After Return

Organisation	Length of Stay After Return		Percentage of Employees Who Leave
	Months	Years	
Management Consultancy Company (HRD speaking regarding client companies)	6-12		90%
Engineering company (MNC Australia based)	6-12		40%
Market research company (HRD speaking regarding client companies)			
In smaller organisations	6		20%
In larger organisations	12		40%
Public relations company (CEO speaking regarding client companies)		2	40%
Accounting group (this percentage leave to look around for other overseas positions)	6		25-35%
Technology company (Singapore)			
Senior people, long-term employed tend to stay in the organisation	-		-
Junior people,	6-12		75%
MNC, Malaysia based company, Kuala Lumpur	Within 24 months		25%

Comments from human resource managers relevant to employees' length of stay are:

"The average engineer tends to look around and join another organisation that would send him or her overseas again." (Personnel Officer, Civil Engineering Company, Singapore)

"We are a large organisation but despite opportunities with us, repatriates have various lengths of stay on return. Eighteen months to twenty four months stay would be average." (HRD, MNC Trading Company, Australia)

"These days the commitment between the employer and employee may not be much longer than five years in total. The repatriate therefore, generally stays about six to twelve months." (HRD, Management Consultancy, Australia)

“Between three to six months to a year but mostly after six months when forty percent of returnees leave for other organisations.” (HRD, Engineering Company, Australia.)

“In smaller organisations twenty percent leave in six months. In larger organisations thirty to forty percent leave within a year.” (HRD, Market Research Company, Australia)

4.5. Summary

This chapter presented the results of the qualitative interviews with fifty human resource managers in organisations in Australia, Singapore and Malaysia. The major research questions were broken down to seven sub-questions and answers to these were identified and patterns of results emerged.

The next Chapter will discuss the results and analyse them for their relevance to the research questions and to the literature review. Results will be compared and implications and conclusions considered for the final Chapter 6.

Chapter Five:

Analysis of Data

5.1. Chapter Overview

This chapter examines the results reported in Chapter Four and explains and interprets these findings within the context of this research and within the context of prior research examined in the literature review in Chapter Two. Results will be compared and implications and conclusions considered for inclusion in Chapter Six.

Looking at the progress so far in this thesis, Chapter One introduced and delineated the problem and background to the research study and described what steps the research study was to take and the research questions to be answered. The literature review in Chapter Two gave an account of the current literature on expatriate selection, training, family issues, and repatriation. The research design of Chapter Three described how the research took place and what designs were used to collate responses to the research questions. Chapter Four reported the results and this Chapter Five will analyse and interpret the results in the light of extant literature.

5.2. Research Questions

The chapter will identify patterns in the responses and analyse them for their relevance to the study's five research questions delineated in Chapter Four. For ease of reference these are:

- 1. What factors do organisations use in making expatriate selection?**
- 2. What measures do organisations use in the training of expatriates for overseas postings?**
- 3. What impact does the expatriate's family have on the success or failure of the overseas posting?**
- 4. What factors relate to the repatriation process and career planning?**
- 5. How do responses on expatriate recruitment, management, and repatriation differ across the target countries?**

Each of these questions will be related firstly to the literature review of Chapter Two, secondly to the results of the qualitative interviews reported in the previous chapter and thirdly to the findings of research conducted in Singapore and Malaysia. Comparisons and significant issues, similarities and differences will be investigated.

5.3. Expatriate Selection

The first research question is:

“What factors do organisations use in making expatriate selection?”

Both the literature review and the findings of this research revealed that technical competence was very high on the list of criteria management looked for in selecting personnel for overseas appointments (see Table 68 below).

Table 68: A comparison of Stone’s (1994: 4) ranking and this study’s ranking:

	Australian Managers N=47	Expatriate Managers N=52	Asian Managers N=15	Australian Managers in this study N=33	Asian Managers in this study N=18
Ability to adapt	1	1	2	6	4
Technical competence	2	3	1	1	1
Spouse and family *	3	2	4	7	5
Human relation skills	4	4	3	5	6
Desire to serve overseas	5	5	5	4	2
Previous overseas experience	6	7	7	2	3
Understanding of host country culture	7	6	6	3	7
Academic qualifications	8	8	8	9	9
Knowledge of language of host country	9	9	9	8	8
Understanding of home country culture	10	10	10	10	10

*) Marital status was the criterion for selection in this study

Table 68 makes interesting reading, as there are a number of marked differences in the rankings between the researcher’s results and Stone’s findings. In the ‘Australian managers in this study’ column, for instance, previous overseas experience, an

understanding of host country culture and a desire to serve overseas are ranked second, third and fourth after technical ability in this recent research study. This contrasts with Stone's 1994 results in which Australian managers and expatriate managers rank ability to adapt (1), technical competence (2), spouse and family (3), and human relations skills (4).

A closer look at the table, however, reveals that, as a criterion for selection, Australian managers with previous overseas experience would already be regarded as having the ability to adapt to a new country and new surroundings, thus, responses in this study place 'Ability to adapt' lower down as number 6 in the ranking process. Also 'Spouse and family' needs to be clarified. As noted on the table, this study referred to 'marital status' as a criterion for selection. Whether a candidate was married or single was a criterion for selection in organisations, particularly, in mining and exploration companies where single people were preferred because of accommodation and remote environment circumstances. 'Spouse and family' on the other hand, as the results in Chapter Four show, rated an impressive 56 percent response in favour of a supportive family and partner.

Other differences, in the ranking order between the literature review and the current research study which require clarification are as follows: "an understanding of host country culture" and "motivated to work overseas" ranked third and fourth in the study in contrast to Stone's (1994) ranking of fifth and sixth in the table.

According to Rahim (1983) and Deresky (2000) these two categories are crucial to successful expatriate assignments. Mendenhall and Oddou (1986) address cultural

training, language instruction and lifestyle communication adjustment as essential factors during pre-departure training, post arrival training and re-entry training.

Motivation to go overseas, as a selection criterion, gained a 42 percent approval rating from interviewees in this study. An increasing occurrence in expatriate management is the selection of highly motivated, short term, one to two years contract personnel going abroad to increase their cross-cultural knowledge and develop international skills with no obligation on the part of employer or employee to continue employment.

Eighteen Asian managers were interviewed for this study during the latter half of 2000 in Singapore and Malaysia while Stone's research consisted of interviewing fifteen managers predominantly from Hong Kong in 1993.

The seven years time difference between the two studies has not changed the number one ranking of selection criteria which is 'ability to do the job' or 'technical competence'. There are, however, significant differences between the earlier research and this study in the next four rankings as the following table shows:

Table 69: Significant Differences Between Stone's Research and This Study

Stone's Ranking	Number	This Study's Ranking	Number
Technical competence	1	Technical competence	1
Ability to adapt	2	Desire to serve overseas	2
Human relations skills	3	Previous overseas experience	3
Spouse and family	4	Ability to adapt	4
Desire to serve overseas	5	Spouse and family	5

Desire to serve overseas (ranking no. 2) and previous overseas experience (ranking no. 3) are interesting developments for selection criteria in this study and confirm remarks made by thirteen Asian human resource managers (75 percent of those

interviewed) that enthusiastic and highly motivated individuals with overseas experience are those who are in demand and who make the most successful expatriates. An eagerness to do a good job overseas coupled with successful overseas experience are two important criteria which managers look for in their organisations in Singapore and Malaysia and which are, according to the interviewees, difficult to find.

Seventy percent of Asian managers specifically spoke of the reluctance of personnel in their organisations to accept a posting of one or two years duration overseas. Dual-career situation, family education and the fear that out of sight, out of mind would affect their progress in the company's promotion ladder were significant obstacles in the selection of personnel for overseas assignments.

Technical competence is certainly important; however, strong motivation to do the job overseas with some overseas exposure followed by the ability to adapt and a supportive spouse and family were the criteria required and the ingredients of a successful posting abroad for organisations in Singapore and Malaysia.

Before proceeding to the second research question on the training of expatriate managers for overseas postings, there is an area of concern specifically raised by a broad spectrum of human resource managers in both large and smaller organisations during the interview process of this study. As many as 70 percent of human resource managers in 35 out of 50 companies interviewed expressed dissatisfaction at their level of involvement in the actual selection process, arguing that much more

involvement would result in a more successful choice of expatriate for the overseas post.

The interviewing, observation and appraisal processes during selection should be a democratic process with equal participation from senior management, line and staff management and the human resources management personnel. In several large multinational organisations interviewed, such a process of equal say is in operation with successful outcomes. In other organisations, senior management and line management have the final say, sometimes only say, in the selection process.

The lack of human resources departments' participation in the selection process must be addressed by senior management if companies are to reduce or avoid expatriate failure. At the same time, human resource managers themselves should be addressing this issue more assertively. It is a significant finding in this research study. It is referred to in the results of the research in Chapter Four and will be discussed in more detail in the next chapter.

5.4. Training of Expatriates

The second of the five major research questions is "*What measures do organisations use in the training of expatriates for overseas postings?*"

In-house training with the emphasis on cross-cultural and cultural-social behaviour is a significant finding in the literature review, and also in the research interviews.

Culture novelty is shown clearly in the model of the literature review as a crucial area in the adjustment of the expatriate, the family and also of the organisation.

In forty-four percent of organisations, interviewees stated that cross-cultural preparation was a top priority and fifteen organisations had enacted a compulsory policy that staff, who had been selected for overseas appointments of a year or more, be obliged to attend acculturations programs some lasting several weeks.

In seventeen organisations (34 percent) interviewees spoke highly of pre-assignment overseas visits as cross-culturally beneficial to ingoing expatriates, while twenty-eight organisations (56 percent) are conducting in-house training using 'in-house executives with relevant overseas experiences and knowledge in the particular host country' or 'out of house external experts'.

On the other hand, in thirty-one organisations (62 percent) interviewees clearly were not convinced that the above training programmes demonstrated effectiveness and indicated substantial benefits to trainees or the organisation. Some advocated language competence (20 percent) and paid for language training courses while others were convinced that the expatriate could 'learn on the job' overseas (30 percent) gaining the necessary training and knowledge during the handing over process.

In relation to the interviewer's question "*What training activities do you provide for managers before they go overseas?*", these relevant quotations from senior management are informative:

"Frequently a tap on the shoulder without any preparation as organisations are too dynamic and change is quick to come about." (Senior Manager, Manufacturing Company, Australia)

“Training is available but not compulsory. Take it or leave it. For Americans coming to Australia, no training is offered as cultures are said to be similar, which is a big mistake.” (Human Resource Manager, International Bank, Australia)

“Training is required, but, there are large discrepancies between what the human resources people said they gave expatriates and what the expatriates said they received.” (Director, Consultancy Company, Australia)

5.5. Family

The third major research question is:

“What impact does the expatriate’s family have on the success or failure of the overseas posting?”

The literature review and the results of this research study both emphasise the strong impact that the partner and family have on the outcome of the overseas posting and the success of the assignment during the expatriate’s posting overseas.

In 60 percent of organisations the supportive family was viewed as an essential criterion in the success of an overseas posting in the case of married personnel. Eleven organisations (22 percent) encouraged the partner’s participation when going overseas in choosing accommodation, schooling, children’s welfare and in communicating with mentors in the home office.

In 30 percent of organisations, particularly Singaporean and Malaysian organisations, concern was expressed regarding the dilemma of dual-careers and the repercussions to the partner that overseas assignments can have. Comments from a senior human

resource manager in the engineering industry in Singapore reflect the feelings of many couples in this situation, from Australia as well as overseas. *“Family commitment is required before the employee will accept the overseas posting, particularly, in dual-career situations where their combined Singaporean salaries may be more than the single overseas salary for the employee.”*

The literature reveals that companies, particularly in the United States are beginning to recognise the importance of providing support for both partners who are career-oriented and who demand that both sets of needs be included at the bargaining table prior to going overseas. However, so far the literature, has not addressed this pressing issue in any depth and it is a research area that deserves significant attention.

5.6. Repatriation and Career Planning

The fourth major research question is: *“What factors relate to the repatriation process and career planning?”*

To answer this, two sub-questions were asked during the interview process:

1. *“Do you provide any re-entry training or support on return to the organisation?”*
2. *“How long do employees usually stay after they return home?”*

In answer to the first question, both the literature review and the results of this research concluded that with very few exceptions (8 percent of organisations interviewed) re-entry training and support for repatriated staff was quite inadequate.

Responses from interviewees indicated a lack of accountability on the part of management, particularly senior manager, for the repatriation process.

A significant issue that became evident from the interviews, and one that the literature review does not mention, was the lack of clear lines of responsibility for the expatriation or the repatriation process with no defined role for the organisation's human resources department in the selection, support, and repatriation systems. As the results in Chapter 4 reveal, in 72 percent of cases, the line managers made the selection with members of the human resources department involved in only 40 percent. This concern has been discussed earlier in the chapter and is one that needs to be addressed by management if organisations are to improve their rate of expatriate success and their record of efficient and effective repatriation programmes.

The answer to the second question as to how long employees stay after they return home is not encouraging in the light of management's attitude to repatriation. The interviews and the literature reveal that as many as 60 percent of repatriates wanted to leave their organisation within six months of return from overseas.

The research identified a 'sink or swim' attitude in 64 percent of organisation's interviewed in relation to repatriation. In the eyes of 8 percent of human resource managers interviewed who did have in place sound repatriation processes and procedures, this 'no planning' approach to returned employees was alarming.

As one Human Resource Manager from a multinational oil company said, "*What better and more viable role model could future expatriates have than someone who*

has been on an international assignment and has returned with a positive attitude about the experience and a job well done?"

Another quotation from the CEO of a large manufacturing company in Australia was, *"This organisation tries to show that it recognises and values the overseas contribution. It sends out a profoundly different message than a firm where employees return to no job or are passed over for promotions. In the latter scenario, repatriates inevitably depart from the organisation to enhance their careers and capitalise on their expatriate experience elsewhere."*

The research also revealed an interesting and significant view that repatriation programmes, sound debriefing seminars and efficient mentoring can assist companies to capitalise on the expatriates' experience by using their new perspectives and accumulated wisdom as input for decisions and as a central source of information for helping to globalise the corporate mindset.

Likewise, expatriates who can make more effective use of their international experience upon returning home are also primary beneficiaries. With advance planning, they can more effectively utilise their newly acquired skills and insights. This enhances both the quality of life for these returned employees and it enhances the depth of understanding with which they can do the job.

Responses from the interviewees described the partner and families as benefiting from repatriation programmes, and noted that programmes must address the family's need to return to the home country with minimal reverse culture shock. The more quickly

they can ease back into the home environment, the more easily the employees can lead productive lives again.

5.7. National Differences

The fifth major research question is: *“How do responses on expatriate recruitment, management and repatriation differ across target countries?”*

Out of the fifty organisations in which interviews were conducted for this study, eighteen were from Singapore and Malaysia and the remaining thirty-two organisations were from Australia.

This section of Chapter Five will analyse the responses from Singapore and Malaysia and report on the findings of interviews conducted in these two countries. Due to differing cultural, economical, social and political backgrounds between Asia and Australia, a number of significant differences were noted during the interview process and these will be compared and analysed in answers to the following seven interview questions:

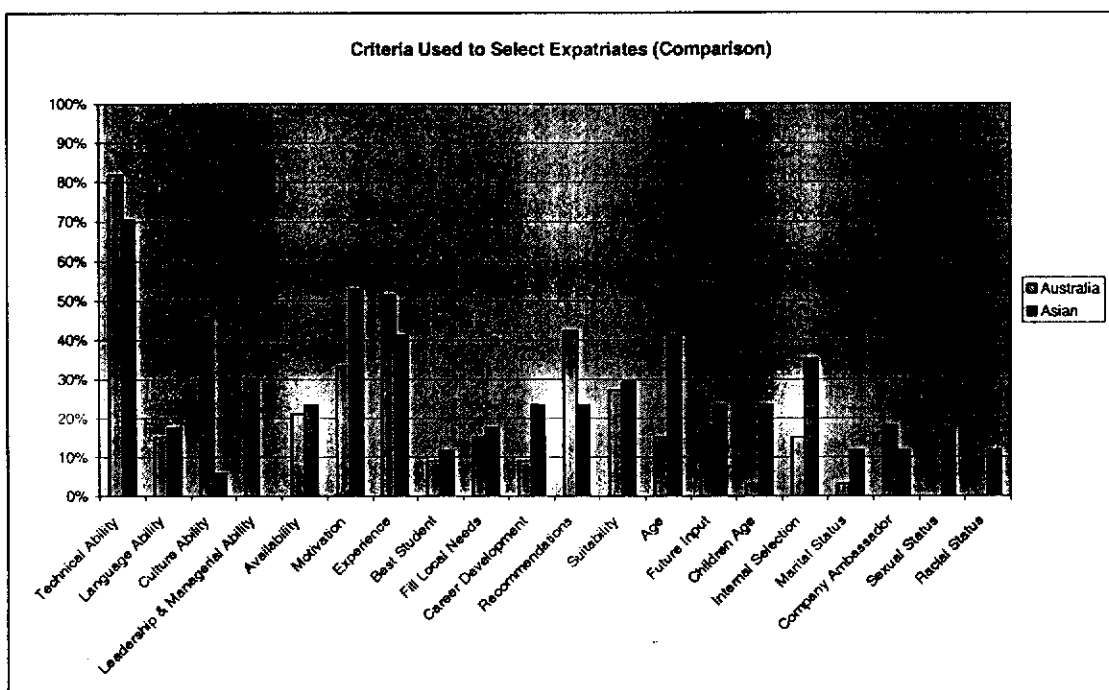
1. What criteria do you use in selecting expatriates?
2. What selection methods do you use to choose suitable expatriate managers?
3. How important do you consider the partner/family contact to be in the selection process?
4. What training activities do you provide for managers before going overseas?
5. What training do you provide for the partner/family before going overseas?
6. Do you provide any re-entry training or support on return to the organisation?

7. How long do employees usually stay after they return home?

Question One: What criteria do you use in selecting expatriates?

The following Figure 19 shows comparisons in criteria used to select expatriates in Asian and Australian organisations.

Figure 19: Criteria Used to Select Expatriates (Comparison)



Technical ability, motivation and experience as criteria for selection were discussed earlier in the chapter when ranking comparisons were drawn between Asian managers in this research study and Stone's earlier research of Asian managers conducted in 1993.

Additional significant differences in the current study are highlighted in Table 70.

Table 70: Selection Criteria Comparison (Classified Regionally)

Criteria	Asian Managers	Australian Managers
Age	42%	16%
Children's Age	23%	3%
Internal Selection	37%	16%
Career Development	23%	9%
Sexual Status	18%	Nil
Racial Status	12%	Nil
Culture Ability	6%	46%
Leadership & Managerial Ability	Nil	30%

- **Age (42% Asian managers vs. 16% Australian managers):**

42 percent of Asian managers consider age important in the selection process as against 16 percent of Australian managers. Age is a unique factor in Asian culture. Expatriates in their mid 40s or mid 50s command more respect and are expected to be more mature individuals and more successful at negotiation than younger individuals within Asian culture. They would also be expected to be more loyal to the company.

- **Children's Age (23% Asian managers vs. 3% Australian managers):**

Children's age was a significant criterion in selecting a candidate for overseas as school-aged children were not welcomed to accompany the expatriate overseas due to education and social problems such as poor education facilities, lack of leisure activities, companionship and personal development.

- **Internal Selection (37% Asian managers vs. 16% Australian managers):**

Appointments from within the organisation or from allied organisations and selecting company personnel who develop into permanent overseas troubleshooters were favoured by Asian managers.

- **Career Development (23% Asian managers vs. 9% Australian managers):**

The emphasis on an overseas posting as a strong career move was an important motivator to entice Asian managers within the company to accept an overseas posting.

- **Gender Status (18% Asian managers vs. nil Australian managers):**

Nine Asian human resource managers specifically mentioned males as more acceptable overseas expatriates for Singaporean and Malaysian enterprises and openly advertise for males for overseas positions. There is no law against discrimination on the basis of gender.

- **Racial Status (12% Asian managers vs. nil Australian managers):**

Racial status was evident in Malaysian organisations where 'Bumiputera' or indigenous Malays (as against Malaysian Chinese) were chosen for government department overseas postings.

- **Cultural Ability (6% Asian managers vs. 31% Australian managers):**

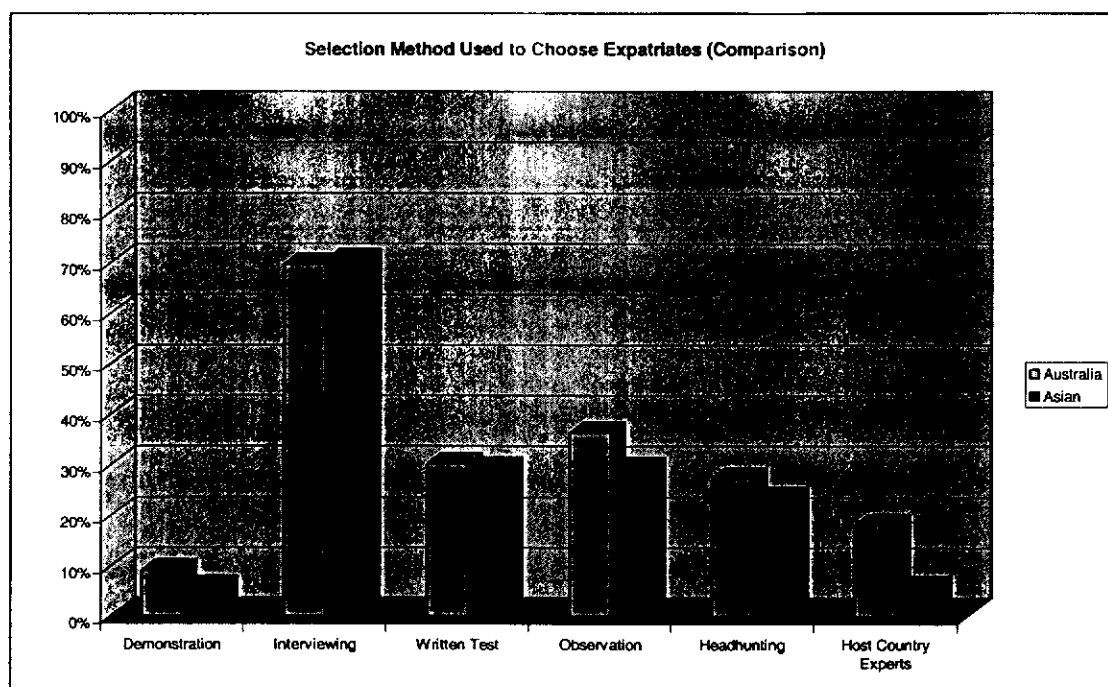
This low percentage of responses from Asian human resource managers as a criterion for selection may be understood in the light of Singapore's multicultural society where the population lives 'in harmony' with each other's cultural differences. Singaporeans, for example, normally speak at least two languages, fluent English and Mandarin, and would speak other dialects such as Hokkien or Cantonese and quite possibly be fluent in Malay or Tamil. Malaysian expatriates are also bilingual or trilingual in English, Malay and Mandarin or Cantonese. Language ability, however, is only one aspect of culture and this low percentage given to cultural ability warrants further research.

- **Leadership & Managerial Ability (Nil % Asian managers vs. 30% Australian managers):**

The ability to lead, manage and motivate by example was very infrequently raised by managers during the interview meetings as a criterion for selection. Over 40 percent (42%) of responses stressed age as an important criterion and this could be understood to include maturity, leadership and good management. On the other hand, the power of authority and hierarchy is strong in both Singaporean and Malaysian organisations, power distance is high and the risk of job dismissal too high to conflict with senior management. This is a significant difference between Australian and Asian cultures and is worthy of future research.

Question Two: What selection methods do you use to choose suitable expatriate managers?

Figure 20: Selection Method Used to Choose Expatriates (Comparison)

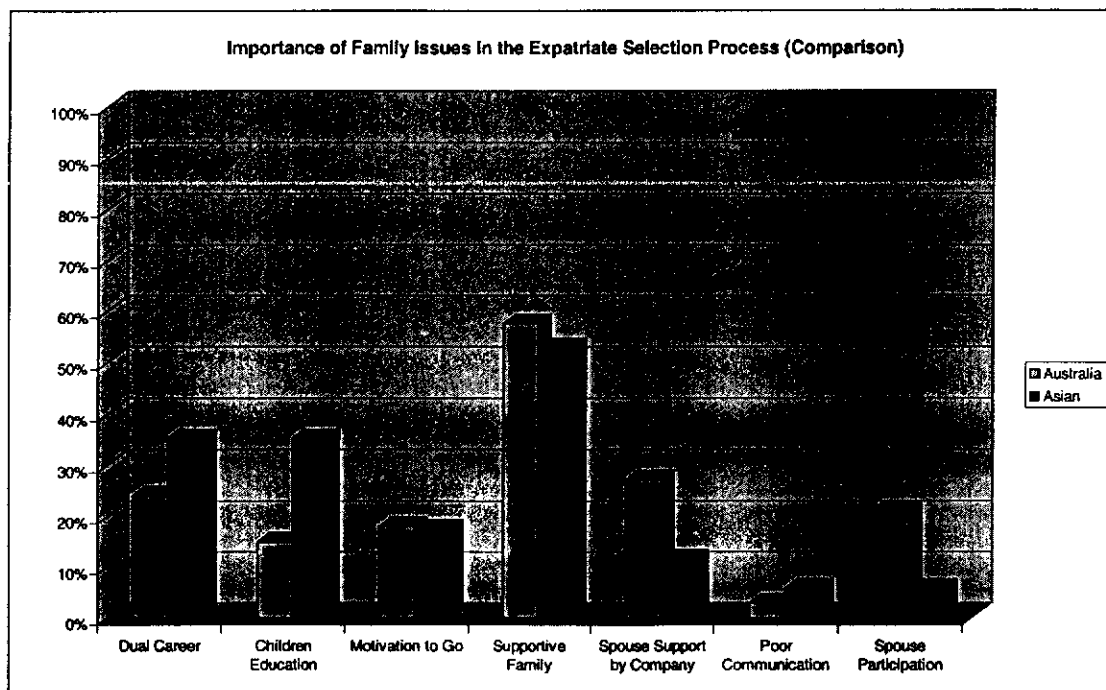


As the bar chart in Figure 20 shows, selection methods to choose personnel for overseas postings are not particularly different between Asian managers and Australian managers. The response that was different and came from 80 percent of Asian managers was the high involvement of senior management in the selection process and lack of concern for the expertise of the human resources department having a lack of consultation. This problem is not exclusive to Singapore and Malaysia as a similar situation exists in Australia and has been the topic of discussion in other chapters of this thesis.

However, senior management decision making and line management involvement in deciding who goes overseas is more prevalent, according to this research, in Asia than it is in Australia. Asian Human Resource Managers are not keen to question the authority of senior management.

Question Three: How important do you consider the family and partner contact to be in the selection process?

Figure 21: Importance of Family Issues in the Expatriate Selection Process (Comparison)



Dual-career issues and children's education are two dominant family issues in the selection of expatriates in Asia in contrast to Australia. Over a third of managers interviewed (34 percent) in Singapore and Malaysia spoke about the dual-career situation and how their organisation was assisting the employee and his or her partner overseas either financially or in seeking employment for the partner at the overseas post.

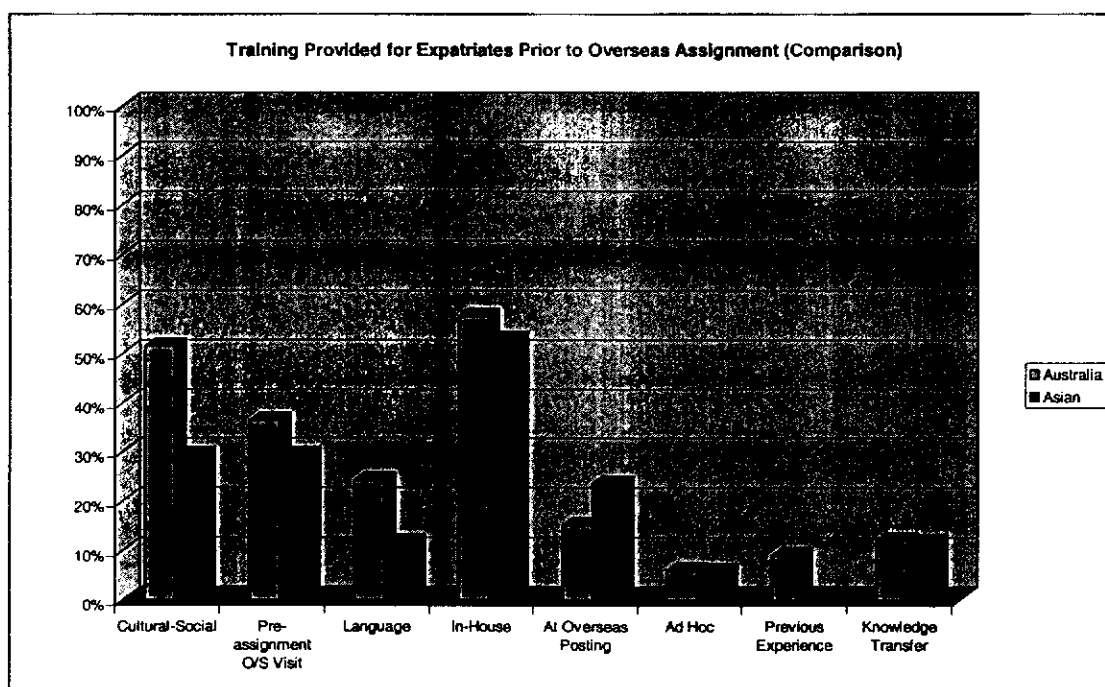
Children's education was a second serious family issue in an overseas posting. Given the highly competitive education system and the emphasis on higher education and university qualifications, expatriates were often left with no alternative but to leave their children with relatives in the home country during the contract overseas. The interviews revealed that organisations, particularly in Singapore, were reluctant to have children of school-age accompany their parents overseas on the grounds of poor

education facilities and the child's overall development. Similar comments were expressed earlier (see Table 70 above).

Officers interviewed in four organisations said that accompanying children were bored, lacked peer-group company and were instrumental in the lowering productivity of the expatriate. These comments are quite contrary to prevalent Australian views that accompanying children are an asset to further the stability and normality of the family overseas and are beneficial to the child's development cross-culturally.

Question Four: What training activities do you provide for managers before they go overseas?

Figure 22: Training Provided for Expatriates Prior to Overseas Assignment (Comparison)



These criteria (see Figure 22) are significant in answer to the above question on training provided to managers prior to the overseas posting.

Firstly, over fifty percent of Australian organisations (51 percent) organise prior to the expatriate's departure, seminars and training programmes, which are culturally oriented and applicable to the particular region or country. In just over a quarter of the organisations in Singapore and Malaysia (28 percent), it was usual to offer cultural and social customs training to incumbent personnel prior to their overseas departure. The reasons given by Asian managers for the significantly lower percentage than in Australia were that employees were already exposed to a diverse cultural workforce in their home countries and that they can cope well in a cross-cultural environment, thus there was no perceived need for expensive seminars.

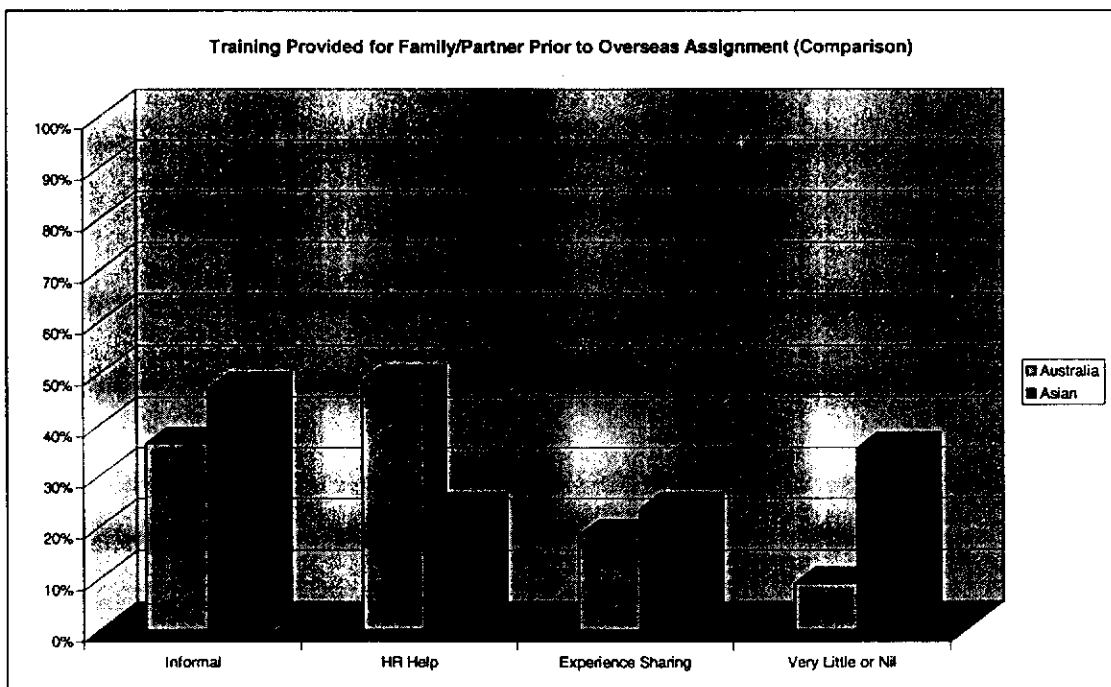
The second criterion which is significantly different between Asian and Australian managers is that Asian managers train for their new environment, by learning in that environment on the job overseas. Twenty-three percent of managers conducted training at the overseas post while only fourteen percent of Australian managers confirmed that this was the case with their expatriates. In the latter case, training was in-house as well as overseas.

The third and final training activity significantly different is language where just under a quarter of Australian managers (23 percent) stressed its importance to learn, prior to departure overseas. Only 11 percent of Asian managers gave this serious consideration mainly because, in their view, the employee and potential expatriate

would already be knowledgeable in at least two languages and had the ability to pick up the relevant language ‘in situ’.

Question Five: What training do you provide for the partner and family before going overseas?

Figure 23: Training Provided for Family/Partner Prior to Overseas Assignment (Comparison)



While managers in both Asia and Australia expressed their support for the well-being of the partner and family during the overseas contract, relatively little or no pre-departure attention was given to the partner and family themselves as regards preparation, cultural assimilation, and cross-cultural understanding of the area in which they would be living for some considerable time.

Human resources department offered help if help was asked for (see Figure 23). Otherwise, it was up to the partner and family to use their initiative and gain relevant information from the expatriate spouse.

Questions Six and Seven: Do you provide any re-entry training or support on return to home country and how long do employees usually stay after they return home?

Figure 24: Positive Issues Concerning Repatriation Process (Comparison)

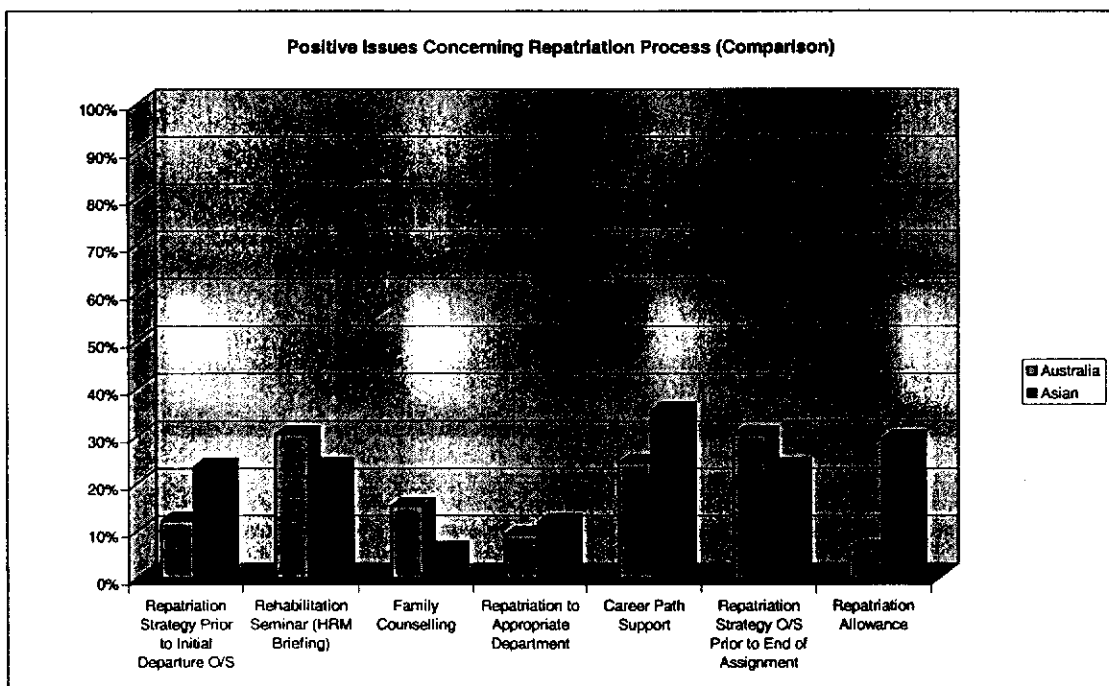


Figure 24 highlights variations in the provision of types of repatriation activities available to Asian and Australian expatriates. Twenty-two percent of Asian managers said that on return from overseas assignments, their organisations did try to support their future career in the company by acknowledging verbally their newly acquired overseas experience. Appropriate work and responsibility did not necessarily follow

and only 11 percent of returnees said that they returned to appropriate department and responsibilities. In the case of Australian repatriates, they told a similar story where repatriation to an appropriate job and department to match their new overseas skills was only 8 percent.

Over twenty percent of Asian managers (22 percent) also acknowledged that strategies were put in place to ensure smooth repatriation process, four to six months prior to return to Singapore or Kuala Lumpur. A similar percentage confirmed during interviews that debriefing sessions and rehabilitation seminars took place on return. A repatriation allowance was given by 28 percent of companies to assist with temporary accommodation and settling in expenses until the repatriate could 'gain his feet' and get back into his or her own previous accommodation. No such allowances were customary in Australia for returned personnel and accommodation was with relatives or in rented premises until occupation of the repatriate's home was possible. Human resource managers confirmed that Singaporeans and Malaysians with overseas experience and who are motivated to return overseas are in demand and frequently headhunted and the average stay of a returned expatriate before joining an organisation to return overseas was between nine months to eighteen months.

5.8. Summary

This chapter has examined further the results presented in Chapter Four by explaining and interpreting the findings and comparing them to the literature review of Chapter Two. Each of the five major research questions of the study has been addressed and significant issues, similarities and differences investigated.

The final chapter of this thesis, Chapter Six will discuss conclusions and implications; significant issues will be examined and contributions made to assist organisations to improve the success rate of overseas assignments and expatriate management.

Chapter Six:

Conclusions and Implications

6.1. Introduction

The explicit theme of this Chapter is to consider the contributions of the present research to knowledge in the field of expatriate recruitment, management, family issues and repatriation. The intention is to identify the most significant research findings and their contributions as viewed from the context of the five major research questions, to postulate an Australasian Expatriate-Repatriate Career Cycle Model and use it to suggest an expanded set of transition strategies for use by organisations.

6.1.1. Research Question 1

The first question which asked the interviewees what factors organisations use in making expatriate selection identified that while technical ability was a priority so were previous overseas experience, a motivation to serve overseas and an understanding of the culture of the host country.

These criteria are revealing because they were not of prominent significance in research undertaken by Stone (1993) where the emphasis was on ability to adapt, technical competence and spouse and family. As the importance of global trade in the future of many companies in Australia and Asia has grown steadily stronger in the

intervening years since 1993, the indications would appear to be that previous overseas experience coupled with motivation to work overseas and sound cross-cultural understanding are the emerging relevant selection criteria for successful expatriation today.

An issue of some concern which was discussed in the previous chapter and which was raised in thirty-five of the fifty organisations where interviews were conducted was the dissatisfaction expressed by human resource managers at their limited involvement in the actual selection process, arguing that much more democratic involvement between senior management and themselves would result in a more successful choice of expatriate for the overseas post.

This is an issue that best would be jointly addressed by senior management and international human resource managers. The findings in the current research strongly support the view of Harvey (1996) who addresses the issue of joint decision making and the need for a planning format which identifies policy strategic and tactical dimensions which can be used in the selection of managers for international assignments. This concept will be expanded on later in the current chapter.

6.2. Research Question 2

The second major research question refers to the steps taken by organisations to train expatriates prior to sending them overseas. Acculturation programmes and cross-cultural seminars presented in-house were given top priority by forty-four percent of organisations. Fifteen organisations (30 percent) had adopted a policy whereby staff

who had been appointed to represent the organisation overseas for more than one year, were obliged to attend comprehensive acculturation programmes; in some instances lasting several weeks.

Additionally, twenty-eight organisations (56 percent) conducting in-house training used experienced repatriates knowledgeable in the particular host country as trainers jointly with 'out of house' experts. Seventeen organisations (34 percent) used pre-assignment overseas visits as cross-culturally beneficial to in-going expatriates.

Nevertheless, as many as sixty-two percent of managers were not convinced that the above training programmes were as effective as they should be in providing substantial benefits to trainees or the organisation. The reasons that were given were that top management perceives no need for expatriate training, cross-cultural training programmes have not demonstrated effectiveness and the evidence indicates no substantial benefits to trainees or companies.

Additionally, managers argued that training is not a cost effective investment, selection leaves too little time before relocation to new assignments to allow in-depth, cross cultural training for expatriates and companies prefer to hire locally thereby creating a trend towards assigning fewer expatriates overseas and weakening the need for expensive training programmes. Figure 7 in Chapter Two lists these reasons which explain why companies were not convinced of the benefits of training programmes overall.

Those who believed that 'blanket' training programmes were ineffective advocated specialised training suited to the particular assignment; e.g., language training, learning on the job overseas, customs and culture programmes suited to the Middle East or Japan or China.

6.3. Research Question 3

From the third major research question which asked the interviewee what impact the expatriate's family had on the success or failure of the overseas posting, contributing factors were that sixty percent of Australian organisations favoured the supportive family as an essential criterion in the success of a married expatriate. The overall well-being of the expatriate resulted from the presence of the family and spouse and the atmosphere of a normal, family life.

While interviewees in Singapore and Malaysia, similarly were in favour of supporting families overseas, senior management in 24 percent of cases were not in favour of school-aged children accompanying the expatriate overseas. The reasons for this are explained in Chapter Five and listed in Table 70 above.

A second significant issue that arose from this third question and that contributes to knowledge of this subject is the increasing number of dual-career couples who are embarking on overseas assignments. Deresky (2000), reported that sixty-five percent of expatriates in the USA have a working partner but the current research from the interviews conducted in Singapore and Malaysia indicated a higher rate of eighty percent of managers confirming that the dual-career issue was a priority concern.

Candidates for overseas postings decline to go overseas because they cannot afford to lose one income or they worry that it may derail the partner's career entirely if he or she is out of the workforce for a few years; thus, the partner does not find a position in the same location, the manager will very likely turn down the assignment.

As stated in Chapter Five this is a pressing issue for organisations in Australia, as well as Asia and is a research area that would benefit from additional attention.

6.4. Research Question 4

Question four relates to the repatriation process and what support, debriefing or training the organisation offers to returned employees. The question of how long employees stay with their organisation after their return was asked also.

6.4.1. Inadequate Support for Repatriates

A high 92 percent of Australian and Asian managers reported in this research that, in their view, the repatriation process, re-entry training and support to overcome culture shock on return were inadequate both for the expatriate and the family. A significantly important issue, as reported in the previous chapter and which adds to the extant literature, is the lack of clear lines of responsibility for the repatriation process with no defined selection role for the organisation's human resources department nor support role in the repatriation process. This 'sink or swim' attitude inevitably leads to repatriates, sooner or later, leaving the organisation often to join an opposition

company able to capitalise on their experience and knowledge. The interviewer identified a 'sink or swim' attitude from 64 percent of organisations in relation to repatriation.

6.4.2. Successful Debriefing Programmes

On the other hand, the research revealed that those organisations which conducted repatriation programmes, debriefed the repatriate and offered counselling and support to the partner and family effectively utilised the newly acquired skills and insights of the returned employee to the mutual benefit of employer and repatriate and to the organisation.

6.5. Black, Mendenhall and Oddou's Adapted Model

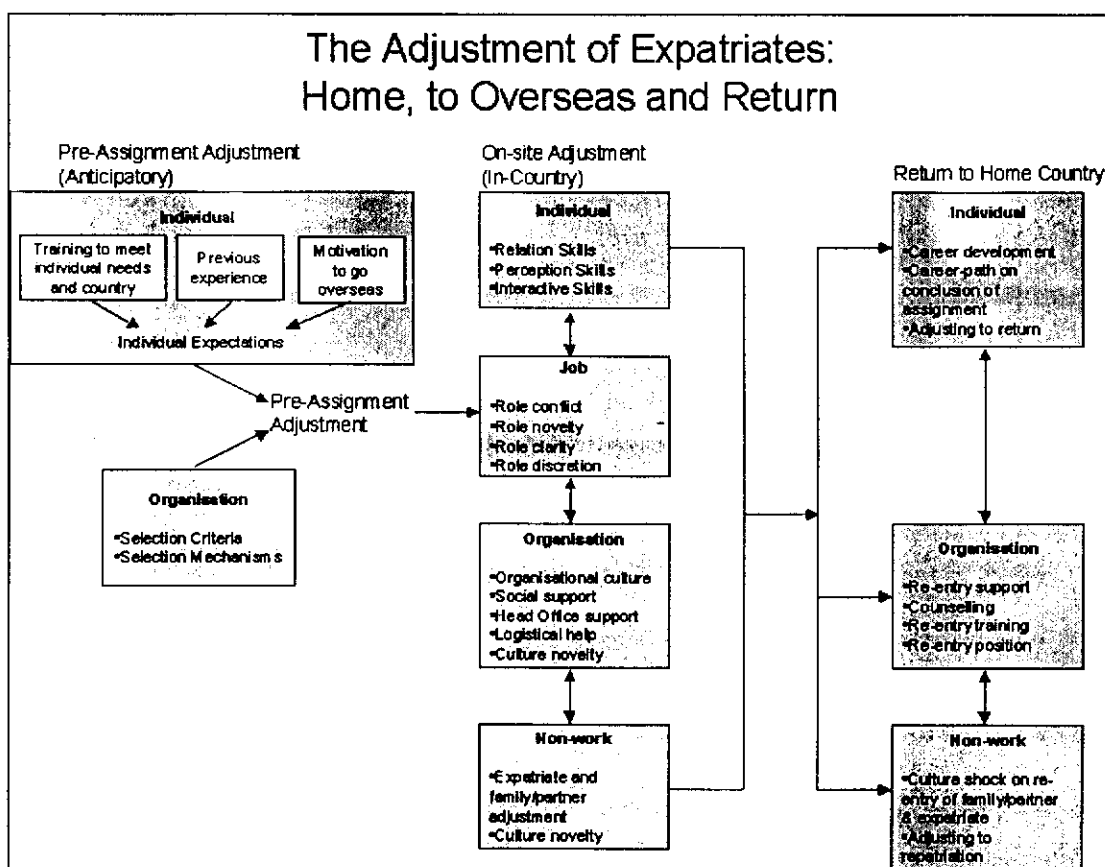
Black, Mendenhall and Oddou's (1991) Adjustment of Expatriate model was demonstrated in Chapter Two (Figure 8) and discussed as a relevant model to consider in the literature review of factors involved in expatriate adjustment to overseas assignments.

While the model is a good reflection of the expatriate adjustment situation in the 1980s and early 1990s, organisations continue to be faced today with expatriate failure, early returns and unhappy associations and departures from repatriated employees.

In view of the added information that this thesis has revealed, it can be concluded that the model is not telling the whole story nor giving the whole picture of expatriate adjustment in 2001.

The following diagram, adapted by the author from Black, Mendenhall and Oddou's original has been expanded to take into consideration the findings and contribution of this thesis and is entitled "The Adjustment of Expatriates: Home, to Overseas and Return."

Figure 25: The Adjustment of Expatriates: Home, to Overseas, and Return
(Expanded by present author from original Black, Mendenhall and Oddou model: 1991)



As shown, there are now three major types of adjustments that an expatriate must make when going on an overseas assignment; pre-assignment adjustment, on-site adjustment in the new country, and subsequent return to home country adjustment.

This postulated 'new' model encompasses the contributions from this current research and adds these contributions to the new format

1. For example, the words, 'To meet individual needs and country' after Training in the pre-assignment adjustment column and also the addition of a third box entitled 'Motivation to go overseas' are, nowadays, very relevant issues.
2. In Column Two, Non-Work adjustments is an added box which includes the expatriate, the partner and family issues such as employment for the partner in the overseas location and adapting to the new culture and new environment.
3. The third major type of adjustment which makes the new model responsive to this research is an enlargement to the original and refers to the important process of returning to the home country. The need for a sound career path on repatriation to the home base, a re-entry position suitable to the skills newly acquired while abroad and assistance to cope with reverse culture shock for the family as well as the expatriate are highly relevant issues and beneficial contributions to the understanding of expatriate management today.

6.6. Research Question 5

The fifth major research question asked how responses on expatriate recruitment, management and repatriation differ between Australia, Singapore and Malaysia.

In the previous chapter, Analysis of Data, investigation of these differences was effected by looking at criteria in selecting, methods, training, family issues and repatriation.

The Singapore and Malaysian economies have strong and historical trading ties with Australia. There are also expanding migration and tourism links with these two countries. Their commercial and academic interests are similar and it was partly due to this favourable background that the majority of organisations accepted the request for interviews when contacted by phone, by email or personally, to be included in this investigation.

Singapore and Malaysia were also chosen as countries in which to undertake this study as the researcher was familiar with both, having lived and worked as an expatriate for over a decade in each area. In both countries, human resource development and management are crucial issues, the level of unskilled labour is still high and though education among Singaporeans and Malaysians is rising, there is a large proportion of the manufacturing sector where, according to Bartol, Martin, Tein and Matthews (1995), workers possess only rudimentary education. With a rising educational level comes the expectation of a higher standard of living and increased quality of work-life. This leads employees to want to be involved in the decision making processes in their workplace and to be more interested in consultation approaches with management. Innovative personnel practices must be developed and introduced to make the best use of employees.

As stated earlier in the thesis, eighteen organisations (15 in Singapore and 3 in Malaysia) were interviewed and though the sample is limited, a number of significant and informative results emerged that have suggested changes can be implemented in order to contribute to greater expatriate success.

For example, the Singapore political environment and the political leadership have been keys to the incredible growth of the island country over the past thirty years. However, as Bartol et al. (1995) point out, Singaporean society is one in which general conformity and compliance is expected and enforced. This has led to a number of characteristics which the country's leaders are now attempting to eradicate. One of these is the concept of 'kiasu' meaning 'fear of losing out'. Its philosophy is best summed up by the local idiom 'better grab first, later no more'. This trait has given Singaporeans an unattractive reputation abroad and it also tends to show Singaporeans as being risk averse. The observations by Stewart (1993) and Bromby (1995) which is applicable still today, is that when the government is promoting an expansion of Singapore's overseas business interests, the 'kiasu' syndrome deterring risk taking is seen as an obstacle to the development of adventurous entrepreneurs.

This attitude of conservatism, confirmed by the interviews conducted with human resource managers in Singapore, is in contradiction to the increasingly sophisticated, knowledgeable, well travelled, and cosmopolitan Singaporean. Therefore, managers when recruiting, for overseas positions in particular, are encouraging initiative, accountability, decision making skills and risk tolerance among Singaporean and Malaysian executives.

The research findings support the above comments as 75 percent of Asian managers said that the significant keys to the selection of an expatriate which would improve the chances of a successful overseas assignment are technical competence, leadership & management skills, initiative, motivation to do a good job overseas and previous overseas experience. These were the people skills in demand in this region of Asia.

A similarly high percentage (70%) of managers confirmed that their personnel were reluctant to undertake an extended overseas posting of one or more years because of:

- Family and educational commitments to their children.
- Loss of income from their working partner.
- Inadequate educational facilities for the children.
- Fear that out of sight, out of mind would mean that promotion might come later rather than sooner or might not come at all and that an overseas posting was not considered to be a vital step on the promotion ladder.

In addition, the research revealed a very hard working, intelligent workforce which seemed to lack leadership, decision making skills, initiative and management ability.

Training, which takes place more on the job overseas rather than in-house, implies that pre-departure training and preparation are not priorities. The result is that 40 percent of repatriates depart from their company after 9-12 months back in the parent company, apparently to join more appreciative organisations.

Human resource managers and senior managers of organisations in Singapore and Malaysia can benefit from these up-to-date findings. Likewise benefits can be gained

by Australian managers trading with Singapore and Malaysia or with branch companies in these countries.

6.6.1. A Final Model Encompassing Asian and Australian Characteristics

Now that the factors which can contribute to successful expatriate assignment have been identified from the five major current research questions, there are features that stand out, particularly from the research conducted in Singapore and Malaysia, that suggest the theoretical models (Figure 8, page 64; Figure 25, page 185) discussed above can be adjusted even further. A final model (Figure 26) is presented which encompasses Asian and Australian characteristics which, if put into practice, not only will enhance the chances of expatriate success but also will minimise the possibility of failure.

While the final model incorporates features of Figure 25 above, it emphasises additional features particularly applicable to Asian managers such as decision making skills, initiative, leadership, a tolerance of risk taking and previous overseas experience. The model also demonstrates the flow of the expatriate-repatriate career cycle by stressing that a strategically sound repatriation process is as important as a well planned expatriate process; as Brewster and Harris (1999), Deresky (2000) and Rodrigues (1996) have pointed out successful expatriation plus successful repatriation equal successful overseas assignments.

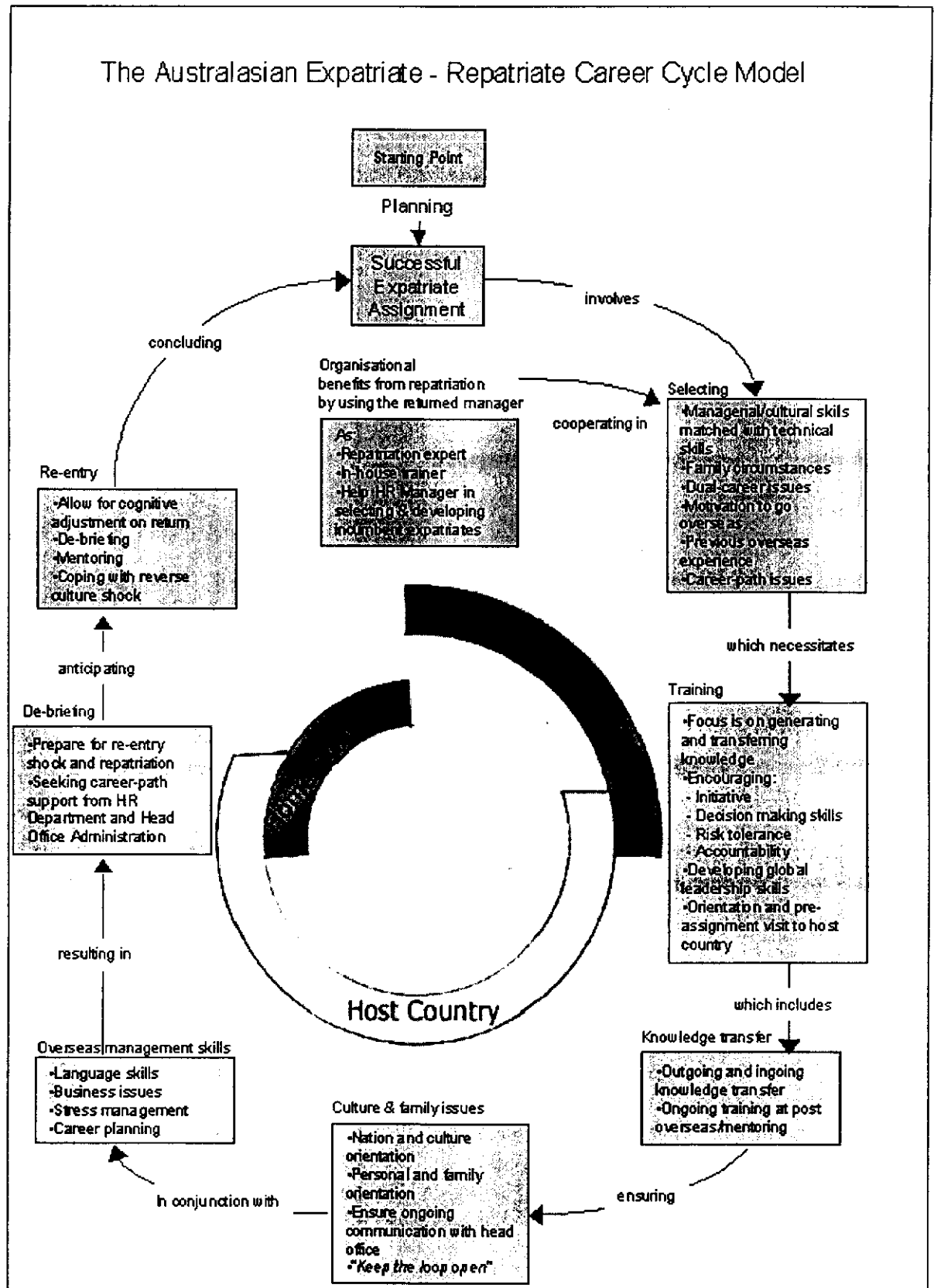
From the starting point of the need to maximise expatriate success, the assignment involves sound selection processes in the home country followed by training in both

the home country and the host country. In addition to the benefits of a thorough expatriate employment program, it is advocated that success is dependent on organisations recognising and implementing factors associated with the overlapping processes between home and host countries in training and also in the preparation for re-entry on completion of the assignment overseas.

Each aspect of the Australasian Expatriate-Repatriate Career Cycle model consistently reinforces the previous aspect in a cyclical manner, thereby maximising the chances of a successful conclusion to the expatriate assignment.

Figure 26: The Australasian Expatriate – Repatriate Career Cycle model

Model concept adapted by present author from Boles & Dickie (1977) *A Heuristic Theory of Leadership*. Unpublished Paper, Western Michigan University Kalamazoo, MI, p. 17.



One of the distinctive aspects of this model is that the repatriate continues to be the 'co-conductor' and not the 'second fiddle' at each step of the overseas assignment. The original skills that warranted their selection plus the skills acquired overseas in leadership and management and in language, customs and culture are used upon return and in concert with the international human resource manager in the training and developing of future expatriates.

Figure 26 above, developed as a result of the present research, shows a number of stages such as selecting, training, family issues, re-entry and debriefing, each of which becomes a step in the cumulative processes leading to the final successful repatriation. Individual organisations are able to improve their expatriate's chances of successful appointments by developing specific transition strategies from the Australasian Expatriate-Repatriate Cycle.

An example of how this can be achieved is suggested in Table 71 which expands and adapts Shilling's (1993) and Solomon's (1995) steps for improving repatriation which was discussed in Chapter 2 (Table 4) above.

Table 71: Transition Strategies: How Organisations and Expatriates Can Smooth the Repatriation Process

	International Human Resource Manager /Organisation's Role	Expatriate's Role	Time Frame
Selecting in Home Country	Discuss Career Path /Dual Career Issues with incumbent. Do not make false promises. Be honest and frank Draw up (where applicable) a repatriation agreement including length of posting and mutually acceptable job on return. Do not promise a specific position or salary, but, state that	Select a senior person in the organisation as a sponsor while overseas to keep you in contact with company policies, structure, moves. Seek answers to your questions regarding future career. Draw up a list of queries from family and self and get honest answers.	Pre-departure

	the job will be equal to if not better than, the one held before leaving. Put this in writing. Listen to the expatriate and partner and family and show you and the organisation care . Arrange pre-assignment visit to the host country	Do not take things for granted – get things in writing. Tackle dual career issues – ask for help for partner's job overseas or request additional allowances to compensate for single income. Discuss career path: Sign acceptable repatriation agreement. Request pre-assignment visit to overseas site with partner.	Pre-departure
Training in Home and ongoing in Host Country.	Focus on generating and transferring of knowledge. Emphasise risk tolerance, initiative, decision-making skills and leadership to ensure successful career path and successful completion of overseas assignment.	Continue training in overseas site on arrival. Insist on sound handover from outgoing colleague. Nurture relations with influential people in post overseas. Ensure ongoing relationships and communication with head office. Learn overseas language and management /leadership skills with a career path in view.	Pre-departure and during overseas assignment
Knowledge Transfer	Encourage expatriate to continue training and learning in the overseas post.	Learn from local executives/staff together with outgoing repatriate.	During overseas assignment
Culture and family issues in Host country.	Ensure monthly contact with partner/family and expatriate . Support children's education Assist in seeking overseas position for partner Visit each quarter overseas site.	Involve yourself in the culture, the customs and travel (where possible) in host country. Ensure frequent communication with home office for partner/children.	During overseas assignment
Overseas Management Skills	Encourage career planning with expatriate. Assistance from Human Resource department and home administration with stress management. Encourage language skills/ Acculturation. Discuss future career in company with expatriate. "Keep the loop open".	Request visits on a regular basis from HR Dept and Home Office Admin.	During overseas assignment
Preparation for re-entry to Host country.	Offer career path support Have expatriate visit home office to prepare for re-entry. Visit overseas site within 6 months and again in 3 months.	Seek career path support ex HR Dept and Home Office admin. Prepare family and self for re-entry culture shock. Arrange visit to home office in preparation for repatriation. Revamp CV.	6 - 9 months before return 3 months before return
Re-entry and debriefing into Home	With partner/family organise training to allow for cognitive adjustment	Try hard to meet expectations on returning to home office. (Use tact and patience skills	Upon

country.	Conduct de-briefing with repatriate partner and family. Conduct seminars including "welcome-home event". Appoint mentor together with previously appointed sponsor. Offer counselling to cope with reverse culture shock.	learned overseas to your advantage.) Pursue counselling from HR Dept for family/partner/ self if required. Listen to sponsor and mentor and take advice as required.	returning home.
Organisational Benefits	Use the returned employee's knowledge, skills, experience, leadership and loyalty to benefit the organisation, the incumbent expatriate, and the repatriate himself/herself. Remember that: * Cultural Re-entry, * Financial implications, * The Nature of Job Assignment are the major areas of expatriate concern and all three should be satisfactorily accommodated.	Use your expertise and new skills in assisting HR Dept in selecting incumbent expatriates. Assist the international human resource manager in training, selecting, advising and encouraging the incumbent expatriate.	Upon returning home.

In Table 71, each stage of the Australasian Expatriate-Repatriate Career Cycle is explained in sufficient detail to effect a programme leading to a satisfactory repatriation process. Within the time frame applicable, the duties and responsibilities of both the organisation, which includes the international human resource manager, and the expatriate are delineated, prior to departure overseas, during the overseas assignment and on the return to home country on completion.

International human resource managers in their task of recruiting personnel and preparing personnel for overseas postings, senior management in organisations and the expatriates themselves can use this Table to facilitate the more detailed planning of their particular roles. If the suggestions and procedures are followed in accordance with the planned, methodical sequence of processes then the opportunities for a

successful repatriation process would be much more attainable than they are today using previous methods.

6.7. Practical Advice

Based on the study's research findings, the following practical advice is offered to international human resource managers and senior management to assist with reintegration of the expatriate. The advice is also relevant to expatriates who are about to proceed overseas for an extended contract of one or more years.

It is suggested that there is articulated clearly a common understanding that the organisation is investing in the employee and that the company wants a return on the investment and expects the acquisition of knowledge whilst overseas on the assignment and a transfer of knowledge when the expatriate comes home. The creation of a repatriation and career path agreement outlining the expectation of each party would be valuable if it included information on placement following repatriation, compensation, transportation, in-country support for family, mentor arrangements and promotion prospects.

6.8. Implications for Organisations and Individuals

Tables 72 and 73 show the positive contributions identified in the thesis as well as the challenges and the suggested alternatives which must be responded to by management

if expatriates and repatriates are to succeed in their assignments and to continue to succeed in their organisation.

Table 72: The Positive Implications to the Research Study

The Positives
<ul style="list-style-type: none"> • Successful overseas postings are enhanced if selection of the expatriate includes previous overseas experience, a motivation to serve overseas and an understanding of the culture of the country together with ability to do the job.
<ul style="list-style-type: none"> • Priority is being given to cross-culture knowledge and ability to manage in diverse cross-cultural workforces, within training programmes in organisations.
<ul style="list-style-type: none"> • Training, in-house or by external consultants or at the overseas post is emphasising the importance of a knowledge and appreciation of the culture and customs of the host country, more so now than before.
<ul style="list-style-type: none"> • The supportive family and organisational support for the family is strongly favoured by 60 percent of organisations within the survey.
<ul style="list-style-type: none"> • Management is adapting to the increasing occurrence of the working partner in expatriate management overseas. Dual-career situations are being assisted by management who investigate job positions in the overseas country or who help financially to compensate for the loss of the couples dual income.

Table 73: The Challenges and Suggested Alternatives to the Research Study

Existing Challenges	Suggested Alternatives
<ul style="list-style-type: none"> • International human resource managers reveal dissatisfaction with their role in the selection process of expatriates for overseas assignments. • Senior management and line management make the final decisions yet the human resource managers are left to sort out the problems in the event of failure or early return of the employee overseas. 	<ul style="list-style-type: none"> • A more participative and democratic selection process must be installed with the human resource manager accorded equal status with senior management to undertake the job he or she is qualified to do. • The human resource manager must be more assertive with senior management to gain, in turn, equal status.
<ul style="list-style-type: none"> • Sixty-two percent of human resource managers are not convinced that training programmes are worth their value or the money spent on the course. 	<ul style="list-style-type: none"> • Training programmes should be tailored to the needs of the individual and the requirements of the particular environment & country. • The programmes should include the partner and family and should be of a specialised nature and if possible include host country experts.
<ul style="list-style-type: none"> • Ninety-two percent of organisations 	<ul style="list-style-type: none"> • Organisations are required to address

<p>reveal that repatriation processes are inadequate and that sixty percent of expatriates want to leave their organisations within six months to twelve months of returning home.</p>	<p>this issue aggressively if their repatriates are to remain and prosper in their organisations.</p> <ul style="list-style-type: none"> • The tips for survival are offered and a model is suggested to assist and remedy this issue.
<ul style="list-style-type: none"> • Asian international human resource managers reveal reluctance by their staff to work overseas due to loss of income as dual-career partners, inadequate facilities to educate their children and fears that out of sight, out of mind will result in no promotional prospects. 	<ul style="list-style-type: none"> • Emphasise the promotional aspects and career aspirations of a posting overseas. • Be honest and realistic, but extra supportive, particularly in dual-career situations ensuring the appointment of a home mentor and good communication channels with home-office during the period overseas. • Organise home-office visits to keep in touch. • Assist the family with tuition fees to educate the children. • Consider an extra monetary allowance to compensate for partner's loss of income where applicable and assist the employee by investigating job prospects for the partner in overseas locality. • Be caring and responsive on return to home base. • Fulfil promotional expectations subject to satisfactory performance overseas. • Make full use of the repatriate's new skills and knowledge.

6.8.1. Continuing Research Options

It is important to note that the various interpretations and explanations of the data must be viewed within the limitations set forth in this research. Exploratory studies such as this one, which involve international research, are subject to constraints. Firstly, this thesis is concerned with expatriate management undertaken with a sample of fifty multinational and international organisations and conclusions drawn from the

thesis, therefore, need to be considered in the light of the temporal and positional limitations.

Secondly, the emphasis of this research was to contribute to enhancing success and minimising failure of expatriate assignments and the results can only suggest trends in factors relating to expatriate failure and success and add an amount of information to existing research. It would be unwise to apply any conclusions as universally applicable generalisations to the issue of either expatriate failure or success.

Thirdly the sample of this study as reported at the conclusion of Chapter One, was originally intended to achieve an even spread of fifty interviews among the three countries involved in this study; viz., Australia, Singapore and Malaysia. As it happened, approximately two thirds of the interviews took place in Australia and one third from Singapore and Malaysia. The reason for this unequal distribution could possibly be put down to the conservative culture and reluctance towards research and researchers in these latter countries. It would be useful in the future, however, to do a much broader study of how well the model in Figure 26 actually fits with a larger range of Asian countries, organisations and managers, as well as in other continents.

Other challenging issues for future research are:

- The increasing occurrence of dual career couples with their particular problems related to embarking on overseas assignments.
- The influence and participation of international human resource managers in company recruitment and decision making processes.

- An extension of this thesis to include expatriates themselves and to determine their views on how to enhance success and minimise failure of overseas assignments.

Finally, there is the threat of cultural bias, which can impact on all aspects of research. It is considered that this factor was present to some degree particularly in answers to the interview questions posed to Singaporean and Malaysian human resource managers where a more positive spin on answers may have been given in preference to a more accurate or negative response.

6.8.2. Conclusions

This thesis sought to collect data which would heighten the awareness of practitioners and academics alike to the need to deal appropriately with expatriate management. To truly globalise an organisation, there must be an integration of personnel into all of the organisation's structure throughout its global network and this includes the domestic division as well as the international division. Cui and Awa (1992) comment that successful global companies like Shell International, Unilever, Nestle, Philips Electronics International, Rohm and Haas Inc., Hewlett-Packard and IBM have long since looked at their managers as being 'a-national' and have created a network-wide career path system for their employees.

As Harvey (1996) points out in forecasting the importance of global trade in the future, the most successful companies will be those able to identify and select an ample number of international managers. The reality is that many multinational and

international organisations have had difficulty in selecting managers for overseas assignments. The importance of selecting the best candidates for expatriation should not be underestimated, as not only do these candidates directly influence the international competitiveness of the organisation but they are also valued assets relative to their domestic counterparts. If, as Naumann (1993) observes, the most suitable candidates for international relocation are not selected, the probability of higher than normal turnover among these expatriates can be expected.

Expatriate selection must go beyond the one-eyed notion of technical expertise as being the control decision variable in determining which managers to expatriate. Without some systematic means to organise the data for selection of managers to go overseas, human resource managers may be relegated to making ad hoc decisions based upon job performance in a domestic position and as Harvey (1996) explains the carryover of domestic expertise to international assignments frequently does not predict success for expatriate. Hopefully by adopting the measures recommended as a result of this research, the rate of expatriate failure can be substantially reduced.

The models developed in this thesis are a direct response to the results from the current research and while the theory continues to evolve, the danger is that the practices that should follow often tend to be more static.

One of the major concerns that has emerged from the study is that the expatriate/repatriate theory is much more substantial and thorough than the associated practices. People in the field are not being encouraged to incorporate best practice in their organisations and this is one reason why more progress is not being made to

avoid expatriate failure. Senior management together with human resource management must be much more proactive in putting theory into best practice, and successful expatriation/repatriation will be achieved for the benefit of individuals and their organisations.

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APPENDIX ONE: Expatriate selection (Survey sample breakdown)
Source: Stone (1990:4)

Note: For copyright reasons, Appendix One (p. 228 of this thesis) has not been reproduced.

(Co-ordinator, ADT Project (Bibliographic Services), Curtin University of Technology, 20/08/03)

*Appendix Two***Fax**

To: _____ From: _____

Pages: _____

Phone: N/A _____ Date: May 15, 2000 _____

Re: Interview Questions _____ CC: _____

As a Curtin University Faculty member and a Doctoral Student of Curtin University, I am writing to ask for your assistance in the implementation of my PhD research programme.

The title of this study is:

Expatriate Selection, Training, Family Issues and Repatriation

As part of the process of exploring the above issues, I seek your permission to interview you as the person who is involved in the selection and training of staff appointed to go overseas and who is also involved in the repatriation of expatriate staff.

I appreciate that you are a busy person and the interview should take no longer than half to one hour. Later analysis would be done under conditions of the strictest confidentiality and the data will be disposed of at the conclusion of the analysis.

It is anticipated that the research results will help to improve expatriate training/selection and reduce the expensive loss of failure in expatriate employment overseas.

As discussed by telephone, in recognition of your contribution to this investigation I will be happy to provide you with a copy of the final report.

I look forward to meeting you on _____.

Yours sincerely,

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Appendix Three**Questions to consider for
Expatriate Selection, Training and Repatriation**

- What criteria do you use in selecting expatriates?
- What selection methods do you use to choose suitable expatriate managers?
- Do you contact the partner/family of the candidate?
- How important do you consider the partner/family contact to be in the selection process?
- Based on your experience with successful expatriates, what selection methods do you consider the most useful?
- What training activities do you provide for the partner/family before going overseas?
- Do you provide re-entry training or support on return to the organisation?
- Are there problems that arise for your company or for the employee following assignments?
- How long do employees usually stay after they return home?

Appendix Four

Amended Interview Sheet

Interview With:

Date:

- Q1. What criteria do you use in selecting expatriates?**
- Q2. What selection methods do you use to choose suitable expatriate managers?**
- Q3. How important do you consider the partner/family contact to be in the selection process?**
- Q4. What training activities do you provide for Managers before they go overseas?**
- Q5. What training do you provide for the partner/family before going overseas?**
- Q6. Do you provide any re-entry training or support on return to the organisation?**
- Q7. How long do employees usually stay after they return home?**