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Expatriate Assignments

Comparison of Theory and Practice

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ABSTRACT

This diploma thesis summarizes and compares the literature available on the topic of expatriate preparation and training. After giving a comprehensive overview over the matters related to the subject, the question is asked how the theory on expatriate preparation matches real life and how far the recommendations found in the literature are applied in practice. To answer this question, two excursuses are included: Firstly, a meta-analysis of major surveys on global mobility and expatriate work will reveal how companies globally are currently managing their international assignments, and secondly a number of interviews will illustrate Austrian expatriate practices in particular. Finally, the all the findings are compared which makes it possible to highlight the similarities and differences.

SWORN DECLARATION

I hereby declare under oath that the submitted Diploma Thesis has been written solely by me without any third-party assistance, information other than provided sources or aids have not been used and those used have been fully documented. Sources for literal, paraphrased and cited quotes have been accurately credited.

The submitted document here present is identical to the electronically submitted text document.

Linz, April 14\textsuperscript{th} 2016

Ulrich Meindl
1. Introduction and importance of the work

The demands of modern markets find many businesses operating in foreign markets and countries. Globalization, global networking, technological advance, information society, and cultural clash are buzzwords of our time. The fast internationalization of business has resulted in the necessity to manage global operations as well as international workforces in an effective way, authors like Selmer and Lauring (2012) and others agree. The fast pace of change and development puts enormous pressure on companies and employees alike, increasing the demand for academic business research in the fields of business expatriates, international assignments and mobility in general. With the nature and purpose of international assignments becoming increasingly complex, it is a question of keeping up with the latest trends and staying competitive or falling behind the competition (Mayrhofer et al., 2004). Being on top of the game and staying flexible in an economy that is characterized by cultural shifts and social change is crucial for success according to researchers like Fischlmayr (2004).

In our globalized and increasingly rapidly changing business world, multinational companies establish foreign-owned subsidiaries and enter into strategic alliances or joint ventures to get a foothold in new markets, compete with international competition, and take advantage of production resources around the globe. The opportunities, but also the challenges of this environment are creating the need for expatriates who can make the most of international locations, Kataria and Sethi (2013) found. Expatriate employment is complicated by fundamental differences between countries and labor markets, cultures, legal and economic systems and thus requires high quality of expatriate employees (Hill, 2007).

The goal of human resource development has always been creating a superior workforce in order to allow the organization as a whole and the employees as individuals to achieve their work goals and best serve their customers, Adiele (2009) states. This means - now more than ever – finding, hiring, and developing the right people to effectively manage and operate overseas businesses in order to maintain and enhance global competitiveness (Dowling & Welch, 2005). Additionally, Adiele (2009) states that most employees are personally interested in developing career enhancing skills like cross-cultural competencies, as well as language and
management skills, because they wish to remain valuable and competitive in the labor market. It is thus essential for human resource and employee training departments to provide the resources necessary to allow the workforce to improve their current skills and develop new abilities, especially in an international environment. The changes in the international playing field have also led to a range of new roles and career path for expatriates, Collings et al. (2007) mention, many of them independent of an organization. Academics for instance have been mobile internationally for many thousands of years according to Tietze (2004), mostly self-initiated. The increasing number and influence of international enterprises during the last decades led to a growing interest in international human resource management and the resulting research clearly indicates the importance of effectively managing human talent internationally, Shen (2005) claims. Having an effective and high quality management is an important determinant of success in international business, even more so than in domestic operations (Tung, 1984). International human resource management is playing an essential role in achieving a competitive advantage and should be treated as such, Ghafoor et al. (2011) argue. When a person from one particular culture meets someone else with a foreign or otherwise different cultural background, the first will subjectively interpret the situation in two different ways, based on which subconscious patterns are inherent to the first subject’s culture. On the one hand, one would like to act how one’s own culture dictates, according to one’s socialization. On the other hand, one would like to show consideration for one’s opposite’s culture and act culturally sensitively. Naturally this leads to a clash of interests and to an internal conflict between the two urges on how to interact. Experience and knowledge have the final say in how a person actually behaves in the end which highlights the importance of proper training. Interactions outside one’s comfort zone are prone to misunderstandings, misjudgments, general confusion and a sense of disorientation, Fischlmayr (2004) explains. These feelings lead to favoring one’s own culture over the foreign one, claiming that it is the only “right” one, or the “best”. This behavior, called ethnocentrism, is a natural response to being confronted with a new and strange culture or environment. To allow for understanding and synergy between people from different cultural background, cultural sensitivity is imperative. Fischlmayr (2004) claims that it is essential for human resource managers working in an international context to
exhibit cultural sensitivity themselves and be able to open their employees’ eyes to it as well. Understanding the environment one works in is a prerequisite for success and this is only possible when people go into new cultures open minded. This explains why training cultural sensitivity is as crucial as it is.

Sending employees abroad to remote destinations as a means of achieving business goals has become an important topic for numerous firms in Austria as well. Like many other countries Austria has become part of a global network and needs human talent to keep these connections alive and functional. Despite years of international experience, many Austrian firms still prefer a more intuitive approach to sending people abroad which makes data, numbers, and facts about expatriation rare or simply nonexistent. Only a handful of researchers have really dipped into the matter and there is hardly ever a specific focus on Austria due to its small size. This lack of concrete and tangible strategies limits the amount of approaches human resource managers can choose from with a clear conscience about viability and applicability (Fischlmayr, 2004).

As the preparation stage of international assignments is especially crucial for expatriate success, research should contribute to this field relevant for modern businesses. Kataria and Sethi (2013) argue that aside from selecting the right candidate, training and learning about cultures is essential for expatriate managers and employees to be successful in a global business environment as competitive as today’s. Through a thorough literature review of the current research and an analysis of empirical data collection, this diploma thesis aims to highlight the effects of cross-cultural training and the expatriate preparation process as a whole, to determine which methods are expected to work best in an international environment. To highlight recent trends, unearth new information and gain a closer look at the preparation processes employed in companies today, this thesis will include two excurses.

Firstly, a meta-analysis of major surveys on global mobility and expatriate work will reveal how companies globally are currently managing their international assignments, which developments are taking place and why. By accessing and comparing the information contained in these surveys, I will be able to construct an accurate and detailed mapping of the current
situation in companies around the world and what they do to meet the demands they face in regards to global mobility.

Secondly, to illustrate the conditions in Austria and to answer the question of what expatriates ex-post themselves think about the steps they went through and how that affected their performance in the field, I will conduct a number of interviews. By analyzing what these Austrian expatriates would change - now that they know what to expect – I hope to reveal any previously concealed issues or gaps in the preparation process of the companies involved. To increase the comparability of the data collected, interviews will be limited to employees of Austrian companies who were sent abroad to Romania. As the differences between two countries can vary tremendously, every pair of countries comes with its own set of challenges and research spanning several country pairs would therefore yield highly variable results, to different to combine in a meaningful way. Romania has had close ties with Austria in the past and will continue to be an attractive market due to its size, location and potential, especially once the aftereffects of the economic crisis have subsided.
2. Research question

Due to the abundance of research on the matter of expatriate training, it is difficult to describe the field as a whole. By analyzing and comparing the literature on the topic of global mobility, cross-cultural training, and expatriate management, this diploma thesis will identify the big schools of thinking in expatriate matter as well as the most interesting trends in the field.

Thus the first research question of this diploma thesis is as follows:

*Based on the literature, is there a consensus on what the best practice for companies running expatriate programs is, and what are its attributes and qualities?*

To determine whether companies invested in international work are in agreement with the recommendations given in the literature and employ these practices and strategies in their everyday business, the second research question will be:

*Based on survey data, how do companies manage their international assignments and what do they consider important in the field of expatriate management? How does it compare to the suggestions of the literature on the topic?*

Finally, to further sharpen the focus, the opinions of Austrian expatriates will be included.

*What is Austrian repatriate employees’ retrospective assessment of their cross-cultural preparation (organizational as well as individual) and the effects it had on their adjustment to the new work environment?*

As the approaches to expatriate work greatly depend on the country context, it is prudent to limit research on a specific country pair, thus making comparison of the data easier and more practical. Comparing information gained from a Japanese company sending expatriates to France to a German firm doing business in Rwanda will hardly reveal any useful insights. Therefore this diploma thesis will limit its research on Austrian-Romanian relations of companies in comparatively similar fields of business. Trends found in such a context can surely be compared in a meaningful way.
3. Expatriate management

The Financial Times Lexicon defines expatriate as “an employee who is sent to live abroad for a defined time period. An expatriate is expected to relocate abroad, with or without family, for as short a period as six months to a year; typical expat assignments, however, are from two to five years long.” (http://lexicon.ft.com/Term?term=expatriate, retrieved October 20th, 2015).

Ghafoor and Khan (2001) write that expatriates are “highly skilled workers with unique expertise who are sent to work in another unit of the same company located in a foreign country, generally on a temporary basis” (p.176). Rather than using host country nationals, multinational companies hire expatriates to coordinate and control their overseas units on grounds of their excellent understanding of headquarter rules, mechanisms, and operating procedures, as well as their greater commitment to corporate goals (Maurer & Li, 2006). Coordination, facilitation of work processes, as well as and control of subsidiaries are the primary strategic roles of expatriates to attain international integration across a multinational corporation’s units (Black et al., 1992).

Expatriates are citizens of one country working in foreign nations and are not limited to managerial employees, according to Kataria and Sethi (2013). The importance of preparation for all categories of international employees should not be underestimated. By employing expatriates, companies can fill vacancies that cannot be staffed locally, while growing as an organization, fostering organizational learning, and developing managerial talent (Fischlmayr, 2004). Expatriates play a vital role in managing subsidiaries where control of local activities is of high importance to headquarters, Torbiorn (1994) argues. As the successful implementation of global strategies greatly depends on “getting the right people with the right skills, at the right time to the right place” (Selmer, 1999 p.77), movement across national borders seems a natural conclusion, the author concludes. Multinational corporations of all sizes are thus facing the problem of attracting, selecting, training, compensating, deploying, and finally reintegrating expatriate managers.
The traditional concept of expatriate assignments follows the international assignment cycle. It depicts the human resource management processes that are involved in an international assignment, at least theoretically. It is an idealized scenario, a complete circle, beginning with recruitment and selection, followed by hiring and the actual assignment and finally repatriation (Figure 1: The Ideal International Assignment Cycle (Christensen & Harzing, 2004, p.620)). After the repatriation phase the expatriate can either continue in his or her old position in the home organization or the cycle starts anew with the employee starting on another expatriate assignment, Christensen and Harzing (2004) explain.

![Figure 1: The Ideal International Assignment Cycle (Christensen & Harzing, 2004, p.620)](image)

*Recruitment and selection* can be either internal or external and tries to match candidates to the assignment profile, *Hiring* covers the contract with everything that it entails, *Preparation* includes phasing-out of the old position, information, and advice and training. *Expatriation* means adjustment, performance appraisals, development, mentoring, and finally, reward. *Repatriation* is the process of evaluating the overall performance to figure out whether to reassign or readjust the candidate, or if he has become redundant (Christensen & Harzing, 2004).
Adler and Gundersen (2008) expand the assignment cycle, adding *Debriefing* as a separate step. They write that few organizations pay attention to debriefing and re-entry sessions, but successful global companies understand and carefully manage these phases as well. The importance of debriefing sessions will be explained in more detail in Sections 8 and 9.

*Figure 2: The Expatriate's Global Career Cycle (Adler & Gundersen, 2008, p.276)*
3.1 Cultural distance

Research shows that the bigger the difference between the expatriate’s country of origin and the host country is, the more tedious and complicated the adjustment process will be. Tung (1987) calls this phenomenon “hardness of culture” (p.124), whereas Mendenhall and Oddou (1986) refer to it as “cultural dimension” (p.333). Cultural distance is negatively linked to cross-cultural adjustment - as cultural distance increases, the importance of cross-cultural preparation increases as well. Waxin and Panaccio (2005) show that “the larger the cultural distance between the country of origin and the host country, the more pronounced are the effects of cross-cultural training” (p.65).

3.2 Cross-cultural adjustment

Literature defines cross-cultural adjustment as the degree of psychological comfort of an individual with several aspects of a new environment (Black, 1990; Parker & McEvoy, 1993; Caligiuri, 2000). Black (1988) puts forward three facets of adjustment (Figure 3) and many other authors agree with him.
Being unable to adjust to the settings in the new surroundings will reduce the chances of success in a number of areas, including work, social relations, and life in general. Black (1988) shows that in order to be effective, expatriate managers have to be able to cope with changes in all the aspects, rather than only some of them, as the inability to adjust to the life conditions in a different country, for instance, impairs the assignee’s ability to perform at work.

In a later publication, Black and Gregersen (1991) also identify three categories of explicative variables for expatriates’ cross-cultural adjustment: individual, organizational, and contextual (Figure 4). “Waxin (2000, 2004) has shown that the expatriates’ country of origin has a direct effect on the three facets of adjustment as well as a moderator effect on their antecedents” (Waxin and Panaccio, 2005, p.52).
3.3 Culture shock

Going abroad or working internationally puts expatriates through a cycle of distinct phases on their way towards adaptation (shown in Figure 5), a phenomenon first coined “culture shock” by Kalervo Oberg in his book from 1960.

The first stage in this process of adaptation is called the honeymoon phase, when the new place is seen as exciting, positive and stimulating. There seem to be endless opportunities and the expatriate experiences feelings of exhilaration, openness and curiosity. Most importantly, “judgment is reserved and even minor irritations are suppressed in favor of concentrating on the nice things” (Marx, 2001, p. 7).

![Figure 5: Own illustration based on Oberg, 1960](image)

Then, during the second phase, culture shock sets in. Culture shock refers to the puzzled and nervous feelings people develop when faced with unusual circumstances like different cultural norms and standards, Oberg (1960) explains. The expatriate realizes that something is not quite right, a feeling of foreignness develops, caused by the fact that people take principles, values,
and behaviors based on their own culture with them when they move to a new country. As they experience the new culture they realize that they are faced with a different set of ideas, heralding the second phase of the process. Culture shock is a psychological process during which people are confused, feel unhappy, nervous and cranky, homesick, bothered and angry (Wild et al., 2000). This is the result of an expatriate’s inability to adjust to his or her new environment and the chance of this happening, as well as the extent of the phenomenon, are positively related to cultural distance.

Despite its bad reputation, culture shock is not a weakness or an indication of future success or failure. Culture shock is a natural process and a part of cultural adaptation, Marx (2001) explains. Being aware of oneself, one’s emotions and the differences leads to more intense feelings of culture shock, but also allows for a more effective adaptation later on. Expatriates who are not affected by culture shock do not adapt very well, but rather rely on generalized views. This means that the onset of culture shock is a positive sign on the road to actual adaptation and, in turn, international understanding (Marx, 2001).

The symptoms of culture shock last for about seven weeks and feelings of isolation, anxiety and worry are most prevalent, leading to a reduction in job performance, high or nervous energy, and helplessness (Marx, 2001). How managers deal with these feelings has great bearings on their future success. Ignoring them, resorting to superficial solutions, or insisting on old routines will lead to failure. Accepting the feelings of culture shock and using them to ignite some form of self-development is the first step towards success and greater understanding of oneself and foreign cultures.

The third phase of recovery starts with just that acceptance: that there is a problem the expatriate has to work on. Both the recovery and the adjustment phase “involve a compromise between the feeling and thinking of the honeymoon phase and the culture shock phase. This compromise is between [...] exaggerated expectations and reality.” (Marx, 2001, p. 8). In the final stage – adjustment - expatriates have learned to work effectively in their new environment, develop new approaches and are more flexible in general.
Marx (2001) suggests that using a less linear model of culture shock is more realistic. Rather than the original model by Oberg (1960), she recommends to integrate a dynamic and repetitive cycle of positive and negative phases, until the expatriate finally “breaks through” (Marx, 2001, p. 10).

![Figure 6: Own illustration based on Marx, 2001](image)

3.4 Expatriate failure

The literature defines expatriate failure as the inability to adjust to the host country environment or overseas assignment, performance goals cannot be met, until finally a premature return to the home country prior to the completion of an assignment takes place (Christensen & Harzing, 2004; Hill, 2007). Christensen and Harzing (2004) complain that the term encompasses a broad range of themes, including premature return, low performance, adjustment problems, and many more. According to them, there are also a number of terms that are often used interchangeably, like expatriate turnover and transfer, as well as recall rates. These two authors further claim that in reality many cases do not resemble the ideal international assignment cycle (Figure 1) at all, as the cycle is easily disrupted. What could be considered expatriate failure in the traditional model should not always count and is not
necessarily a negative result for the company or the expatriates themselves. The fact that
despite the prominent position the topic has taken in contemporary business research and
while globally mobile employees are very important for operational and strategic success of
companies, the rate of expatriate failure on international assignment is high and even increasing
is a result of this misunderstanding, Christensen and Harzing (2004) argue. Depending on the
host country, Sims and Schraeder (2004) estimate that 16 to 70 percent of expatriates fail their
assignments, Tung (1981) considers a range from 16 to 40 percent a more appropriate estimate.
Despite the findings of Dowling and Welch (2005) which indicates that expatriate failure is
declining, studies by Black and Gregersen (2007) confirm that nearly one third of the expatriates
who finish their international work assignments did not perform up to the expectations of their
supervisors. Romero (2002) further explains that persevering for the whole assignment is not
necessarily an indicator of success, as half expatriates who did not return prematurely still show
low levels of performance. Sims and Schraeder (2004) state that expatriate failure costs
multinational enterprises approximately 2 billion each year in the United States alone, as the
financial costs associated with expatriate failure and underperformance are generally speaking
quite significant (Scullion, 2005; Harzing & Christensen, 2004).

In line with Christensen and Harzing (2004), a number of authors have recently begun to discard
what they call “the myth of high expatriate failure rates” (Daniels & Insch, 1998; Forster, 1997;
Harzing, 1995; Harzing, 2002; Insch & Daniels, 2002) and claim that these rates might have
never been as high as originally suggested. However, this is hardly an indicator that expatriate
failure by itself is not a relevant matter to explore, it rather shows that “a systematic
understanding of the concept of expatriate failure is still lacking”, Christensen and Harzing
(2004, p.616) argue. In their article, they review the established understanding of the concept of
expatriate failure and classified the idea of expatriate failure into five categories, premature end
to assignment; premature end to assignment, caused by a reason; under-performance, or
similar, during assignment; end to employment after repatriation; and finally repatriation
problems. All outcomes in Figure 7 belong to one or more of these five categories.
Christensen and Harzing (2004) argue that premature return would be seen as undesirable in the context of the traditional international assignment cycle (Figure 1), but Figure 7 shows that it can have many causes and, depending on the cause in question, can actually be a desirable outcome. While premature return due to an inability to adjust is obviously undesirable, “premature return because of an internal transfer” (Christensen & Harzing, 2004, p.621) can be a sign of organizational flexibility and thus success. The result is the same in both causes, but the causes are different.

3.5 Direct and indirect costs of expatriate failure

It is important for a multinational company’s profitability to make the right personnel choices when it comes to expatriate assignments. The prominent issue in international staffing literature is, as mentioned before, expatriate failure - the premature return of an expatriate manager to his or her home country (Christensen & Harzing, 2004; Hill, 2007). Because
expatriates and potentially their families suffer from high rates of poor performance and even failure, expatriate work can become extremely expensive for multinational companies, both in direct and indirect costs. The total financial costs associated with failed expatriation, as well as premature repatriation stints, vary from case to case, but can be dramatically high.

“In case of expatriate recalls, the direct costs include salary, training costs, and travel and relocation expenses” (Shen, 2005, p.657). Avril and Magnini (2007) also list the reassignment and remuneration package of the expatriate, plus the relocation and compensation of the expatriate’s replacement. In addition to immediate financial concerns, early returns can also be costly for multinational companies in regards to goodwill and corporate reputation, Dowling and Schuler (1990) and Avril (2007) state. The damage done to international business relations can be quite considerable, including worsened host country government connections, as well as damaged relationships with other local organizations and customers. They furthermore entail a loss of market share and business opportunities, an unstable corporate image in the future and misguided employees, according to Shen (2005) and Avril (2007).

Despite research showing that the costs of expatriate failure are high and that bad performance can have far-reaching consequences, a high failure rate of expatriate managers is a persistent and reoccurring problem in many companies. The expatriate failure rate is a good indicator for measuring the quality of a human resource or expatriate management department. Many hurdles encountered by expatriates have been blamed on a lack of training and preparation before departure to the new country. Shen (2005) states that using more potent preparation programs to improve the expatriate’s performance in a foreign environment can help lower the frequency of failure.

3.6 Knowledge transfer

Another important aspect of expatriate management and international assignments that should not be underestimated is knowledge transfer and organizational learning. Grant (1996) remarks that integrating and sharing newly gained experiences is a crucial part of competitive success as knowledge is a vital resource of a firm’s competitive edge and can also be very hard to copy or
imitate by competitors. Expatriate management plays an increasingly important role in knowledge-related functions which include, but are not limited to: “local staff development and skills transfer from headquarters, developing top talent and future leaders of the company, improving the trust of subsidiaries and subsidiary employees, training local employees to improve their individual and team skills, implementing knowledge practices, and developing sharing and transferring best practices”, according to Minbaeva and Michailova’s (2004, p.664) article on knowledge transfer and expatriation in multinational corporations. Bonanche and Brewster (2001) further claim that tacit knowledge is entrenched in the skills and knowledge of a firm’s employees and cannot be codified or contained in manuals. It can only be observed through its application, thus when a company wants to transfer tacit knowledge between different subsidiaries it must allocate employees to actually visit overseas operations and gain first-hand experience.

3.7 Corporate socialization through expatriation

“Corporate socialization is the processes through which subsidiary managers’ values and norms are aligned with those of the parent corporation” (Shenkar & Luo, 2008, p.327) and can be a powerful tool for global integration. Through corporate socialization, managers start to identify with the company as a whole rather than their department and become committed to corporate goals. Job rotations across foreign subsidiaries and expatriate programs are the primary way to ensure global corporate socialization throughout all the strategic subsidiary roles. By moving top managerial talent across the globe on expatriate assignments, companies allow for global integration and a more comprehensive understanding of the firm’s overall global strategy (Shenkar & Luo, 2008).
4. Cross-cultural training

4.1 Introduction

Boakari (2004) writes that culture is what makes us who we are and our cultural backgrounds influence everything we do at all times and in all places. We learn about and live our local culture through the processes of socialization and acculturation which begin in early childhood. Naturally, working in a culturally different environment is a challenge and it is no surprise that a lack of cultural knowledge and language skills, as well as difficulties to adjust to the new culture, are the major elements contributing to expatriate failure (Briscoe & Schuler, 2004; Dowling & Welch, 2005). Learning to appreciate different cultures’ values, norms, beliefs, and behavior patterns and being able to adjust to them as much as possible increases the chances of a successful adaptation. The goal of multinational companies for training and educating expatriate managers in preparation for expatriate work and other global work is therefore to minimize culture shock (compare Section 3.3) and maximize the manager’s effectiveness and efficiency while working in a culturally different environment. “Learning about cultures, becoming aware of cultural differences, and having competence in cross-cultural communication are a must for expatriate managers” (Ko & Yang, 2011, p.158) to carry out a successful overseas assignments. Kataria and Sethi (2013) agree that cross-cultural “training should be considered a life-long endeavor to learn about other cultures” (p.5), as cross-cultural competence is not something acquired overnight. A “successful expatriate manager must be sensitive to the host country’s cultural norms and flexible enough to adapt to those cultural norms” (Kataria & Sethi, 2013, p.5). Both the expatriate manager and his or her family must be able to deal with the eventual culture shock.

Analyzing the demands of expatriate training has become a popular topic in business research and has drawn substantial attention in the international literature. Expatriate failure is always regarded as the result of a lack of high quality training available to expatriates and their families (Shen, 2005). According to Kataria and Sethi (2013), both training methods and company support have an effect on the process of training and learning acquisition. Shen (2005) differentiates between training to improve current work skills and behavior, and development “which aims to increase abilities in relation to some future position or job, usually a managerial
one” (p.657). Training can involve the changing of skills, knowledge, attitudes, or behavior, but is not limited to these aspects. It can also mean changing what employees know, how they approach work, and even their attitudes toward work. Training may further alter employees’ interaction with their co-workers and supervisor, as reported by Treven (2003).

Many multinational corporations are still paying comparatively little attention to international cross-cultural training and management development for first time expatriates, despite the need of effective training for employee success. Kataria and Sethi (2013) argue that a heavier focus on the often intense training needs is required for the benefit of companies, expatriates, and their family members. In order to gain a better understanding of international experiences and to make the most of international assignments, multinational companies need to effectively prepare expatriates for international assignments and develop their global capabilities.

As stated by Waxin and Panaccio (2005), the goal of cross-cultural training is to teach members of one culture to effectively interact with members of another culture and to “predispose them to rapid adjustment to their new positions” (p.52). There are three methods of cross-cultural training: cognitive, affective, and behavioral. The authors explain that “the cognitive method corresponds to a diffusion of information, using conferences or non-participative sessions, on a foreign cultural environment. The affective method aims at provoking individual reactions so the subject can learn to deal with critical cultural incidents. The behavioral method aims at improving participants’ capacity to adapt their communication style and to establish positive relationships with members of another culture” (p.52). This model, originally by Brislin (1979), has been expanded by researchers over the years and situational as well as individual variables have been added. Tung (1987) connects the model with cultural distance and language barriers, Black et al. (1992) include function and role of the manager, and Mendenhall and Oddou (1986) incorporate planned duration of the stay abroad. Ronen (1989) adds personal learning objectives, Black et al. (1992) decree of active participation, and Tung (1981) finally identifies five different training types: didactic training, culture assimilator, language training, sensitivity training and field experience.

What all these different models of cross-cultural training have in common is that they all include three fundamental variables: the cultural distance between the country of origin and the host
country (compare Section 3.1) the expatriate’s level of integration with his or her environment, and the length of the international assignment (Waxin & Panaccio, 2005). The goal of all types of cross-cultural training is to design programs which enhance the assignees’ awareness of cultural differences and sensitivity in dealing with cultural issues (Wang & Tran, 2012).

4.2 Cross-cultural efficiency

Black and Mendenhall (1990) and later Black and Gregersen (1991) undertook a review of empirical studies on the relationship between cross-cultural training and efficiency in international assignments. “Their findings can be summarized in three conclusions – cross-cultural training is associated with: feelings of well-being and self-confidence; development of appropriate behaviors in the context of the foreign culture; and improvement of the relationships with host country’s inhabitants” (Waxin & Panaccio, 2006, p.54). In his study from 1987, Earley discovered the positive effect cross-cultural preparation had on adjustment to new cultures and on managerial success and Hammer and Martin (1992) write of similar findings after studying American managers stationed in Asia, confirming the potency of the training methods.

In order to have the greatest effect, expatriate preparation programs should be consistent with the characteristics of the host country’s culture, Waxin and Panaccio (2005) suggest. The training must also conform to the cultural distance between the home and the host nation. “The more different that culture is from that of the country of origin, the more important and necessary the use of cross-cultural training programs” (Waxin & Panaccio, 2005, p.64) becomes and the more in-depth the preparation process should be.

Global development should also go further than merely information and orientation training and involve sensitivity training as well as field experience to allow the assignees to get an in-depth grasp of the cultural disparities. The departments responsible for multinational companies’ international training and learning programs should provide training which educates, prepares and protects expatriate assignees and other internationally mobile employees for and from career development dangers, repatriation problems, and (reverse)
culture shock. It is the duty of the firm to encourage expatriate employees to increase their knowledge and know-how and learn new skills and attitudes in line with the company’s international objectives, which are crucial to expatriate performance (Kataria & Sethi, 2013).

In accordance with Galagan and Wulf’s (1996) research successful training and learning depends on a systematic approach involving a careful needs assessment, relevant program designs and a complete and thorough evaluation of results. International companies have great influence over the content of and procedures employed in expatriate training and learning programs can be designed to meet their particular needs as well as the expatriate employees’. Multinational firms have the capabilities to design training programs and structures for expatriate managers to allow them to stay up to date with new developments as well as anticipate future needs. The goal, as mentioned before, is to view training as a continuous learning endeavor. Expatriate employees who receive training will not only be more valuable to their company, but also earn an average “30 percent more than those who don’t receive such training” (Kataria & Sethi, 2013, p.10).

4.3 Effects of cross-cultural training

Waxin and Panaccio’s (2005) research clearly shows that cross-cultural preparation programs in all their forms improve all aspects of expatriate adjustment. It has, however, the least influence on work adjustment. Work related adjustment remains relatively the same no matter where the manager is stationed, while personal interactions and other facets of everyday life fluctuate quite a bit. Cross-cultural training can also be linked to an improvement of the connections expatriates make with persons part of the foreign culture. Results varied significantly based on what type of cross-cultural training was received, Waxin and Panaccio (2005) discovered. The study further found that specific experimental training was the most potent of the training types.

Research on cross-cultural training suggests that assignees perform on higher levels during their international assignments and are also more satisfied with their duties after intense training (Black & Mendenhall, 1990). Research evidence also shows that multinational enterprises that
“provides training for expatriates believe that it improved their employees’ effectiveness and enabled them to relate more easily to a foreign culture, which fosters a better image of the firm in the host country” (Kataria & Sethi, 2013, p.8).

According to Waxin and Panaccio’s (2005) the positive effects of cross-cultural preparation on the three facets of adjustments (see Figure 3) are more distinct for assignees with little or no prior experience with global assignments. Naturally this does not mean that using inexperienced assignees is more effective than using experienced ones, but only that giving people with no prior understanding of cross-cultural relations a basis to build upon is easier than teaching advanced techniques and explaining the often sophisticated and minute details of cross-cultural interaction to experts.

4.4 Training effectiveness and rigor

Black et al.’s (1992) model presents a way to combine the different methods of cross-cultural training and assess their success. The model is firstly based on the three aspects of social learning theory – attention, retention, and reproduction and shows how these three aspects are influenced by individual differences in expectation, motivation and the incentives to apply the learned behavior once the expatriate is abroad. Secondly, Black et al. construct a three step learning process, corresponding to the three stages expatriates have to pass through in the host country in order to adapt to their new surroundings. First comes awareness of cultural behavior, then examination of what they learned, and finally the application of their training in practice. Training helps to surmount these steps and eases the process.

Black et al. (1992) also coin the term “training rigor” (p.97) which describes the amount of time that went into training and its intensity. The more rigorous the training, the more likely the learned skills will be applied. Low rigor training has to limit itself to passive participation, while high rigor training has room for the involvement of the expatriates.
Cross-cultural preparation is an essential instrument to facilitate the development of expatriate assignees and to further improve the skills and abilities they need perform in a foreign environment (Tung, 1981; Brislin, 1981; Scullion & Collings, 2006). The effectiveness of cross-cultural training has been shown again and again (Ashamalla & Crocitto, 1997; Eschbach et al., 2001; Kealey & Prothroe, 1996). The majority of studies conclude that preparation programs are crucial for international work (Bhawuk & Brislin, 2000; Black & Mendenhall, 1990; Littrell & Salas, 2005) and some authors additionally showed the especially positive effect cross-cultural training has on cross-cultural adjustment (Black & Mendenhall, 1990; Earley, 1987; Lee & Liu, 2006; Eschbach et al., 2001; Osman-Gani & Rockstuhl, 2009; Selmer, 2005) and how it reduces the time needed to develop cross-cultural competences during an assignment (Harris & Moran, 1979; Black & Mendenhall, 1990; Tung, 1981; Scullion & Collings, 2006). It furthermore improves the overall performance of the assignee, write Earley (1987) and Morris and Robie (2001). Despite the great number of studies, Black and Mendenhall (1990), Littrell and Salas (2005) and Selmer (2005) doubt its potency on international assignments as they say the data is still inconclusive and lacks actual empirical support.

Ayoko et al. (2004) and Osman-Gani and Rockstuhl (2009) further think that the research done on cross-cultural preparation effectiveness has two major limitations. So far, it has been primarily conducted through quantitative research approaches and from the view of Western
assignees. They agree that there is a lack of qualitative research data that and studies based on non-Western expatriates’ experiences. This diploma thesis will try to add some material to fill this gap in qualitative research by examining the personal insights gained by expatriates ex-post, which should provide further understanding, despite them being from a Western culture.

4.5 Types of cross-cultural training

There are a number of training options available to international firms, based on the time of execution, as well as the length and intensity of the training the company has in mind. A further distinction can be made by who offers and designs the training program, which will be explored in more detail in Sections 6.2 to 6.5.

4.5.1 Pre-departure training

According to Mendenhall (1999), pre-departure training is the first stage of cross-cultural training and has been recognized as showing great effect once expatriates have arrived abroad. This form of initial cross-cultural training provides expatriates with the essential knowledge that they require immediately after arriving at their destination. This includes, but is not limited to, cultural imperatives and customs, business etiquette of the host country, dress code, required meetings, legal necessities and solid language training (Avril & Magnini, 2007). Pre-departure training should prepare expatriates for the ambiguous situations they might face at the beginning of their assignment and allow them to see those challenges as learning opportunities for the future. Rather than avoiding tough situations, expatriates should be taught to improvise strategies on the spot even if success is dubious at best, say Avril and Magnini (2007). Wang and Tran (2012) note that herein lies one of the bigger issues with pre-departure training, as its structured nature cannot prepare for the largely unstructured situation assignees find themselves in after their arrival in the host country. They recommend post-departure or post-arrival training (see Section 4.5.3) as a means to alleviate these issues.
4.5.2 Pre-departure visit

Research by Black and Gregersen (1991) shows that visiting the host country prior to the actual assignment is a good way to gain first-hand knowledge of the future work environment, the country’s culture, and its people. Experiences gathered during such visits can help to reduce stress and uncertainties attached to the assignment and limit the effects of culture shock. It is important that the company provides a realistic view of life for the expatriate, rather than the pre-departure visit giving off a holiday vibe which might mislead the employee to believing everything will be easy anyway, Sims and Schraeder (2004) caution. Today, some companies do not only provide pre-assignment visits to assignees themselves, but also their spouses or families. This helps during the actual assignment, as everyone involved has had the opportunity to experience the host country first-hand. Offering pre-assignment host country visits is definitely a trend that has been picking up steam during the last years (KPMG International Cooperative, 2015).

4.5.3 Post-departure training

Ghafoor et al. (2011, p.338) state that “pre-departure training does not adequately address the specific cultural and unique workforce demands present in a particular assigned country”. The authors agree with Vance and Paik (2002) insofar that “post-departure or on-site training is much more effective and important than pre-departure training” (Ghafoor et al., 2011, p.338). Research has shown the positive effect of pre-departure training, but according to Suutari and Burch (2001), training should continue when the expatriate has arrived in the host country as pre-departure training limited to a few sessions is not enough to really prepare an assignee for the problems he or she will face in his or her new position. Post arrival training helps to reduce the effect of culture shock and aims to minimize the problems associated with a lack of cross-culture adjustment, Sims and Schraeder (2004) and Wang and Tran (2012) agree. Post-arrival training has the advantage of being more readily applicable to the situation at hand, allowing expatriates to combine their new experiences with the knowledge they gain through training. It gives assignees an opportunity to evaluate emerging stressors and problems more clearly.
(Sanchez et al, 2000). This training can also involve assistance with basic necessities as dealing with tax issues, schooling of children, opening local bank accounts and other general counseling with day to day life in the host country, which is not only beneficial to the assignee, but also to his or her spouse and family (Mendenhall & Wiley, 1994).

A study by Ko and Yang from 2011 recommends “focusing on post arrival cross-cultural training on the learning of the local norms and regulations, since it has a positive impact on the cross-cultural adjustment, the development of cross-cultural competence, and the job-related performance of the expatriates” (p.170). Their work indicates that post-arrival cross-cultural training focused on these aspects should be worth the investment for multinational companies. In order to shorten the time expatriates need for cross-cultural adjustment and to maximize their productivity, international firms should combine this kind of training with their pre-departure cross-cultural preparation programs, the authors conclude. “It would make the expatriates more aware of the issues they will be facing, will motivate them to learn and to acquire the necessary skills, and will familiarize them with what to expect, thus minimizing potential stress, shortening the adjustment time, and helping them develop cross-cultural competence as early as possible” (Ko & Yang, 2011, p.170).
5. The perfect fit

5.1 Introduction
There are a number of steps each multinational firm has to go through to find suitable candidates and mold them to the company’s needs. To be able to compete in the global market, companies need successful global managers with the right combination of technical, political, social, organizational, and cultural skills (Harvey & Novicevic, 2011). Finding, attracting, growing, and keeping superior candidates has become a contest between globally operating companies and is easily one of the most essential criteria for success. Due its complicated nature, every step should be taken with careful consideration, especially because not only does the nature of the host culture have to be considered, but also the nature of the assignee’s cultural background (Fischlmayr & Kopecek, 2015).

5.2 Attracting candidates
Based on Fischlmayr (2004), there are a number of reasons for employees to look into expatriation work. First, international assignments are generally better paid than comparable work in the assignee’s country of origin. Higher salaries and other forms of compensation like housing, school and mobility subsidies make expatriate jobs financially attractive. Secondly, working internationally often increases the employee’s status and position. Representing the company in another country comes with a certain prestige and can even raise one’s social standing outside the work environment. Expatriate work also tends to come with a high level of autonomy and taking on an expatriate position usually means accepting more responsibilities. Fischlmayr (2004) also lists a perceived career move as a reason why employees would seek out international work. Research indicates that this is a misconception though, as repatriation can often be tedious and losing privileges the employee had abroad often causes frustration and other negative feelings. Many companies do not have structured reintegration plans for returning assignees, who are in turn forced to downgrade or quit. An urge for individual growth, both professionally and personally, is less likely to backfire for the employee and is another good reason to accept expatriate work. Candidates who express a need for adventure or are
looking to get away from personal or work related problems should be sorted out - if possible - as these are not good grounds for quality work, Fischlmayr (2004) concludes.

As with national hiring procedures, there are numerous ways to attract candidates for international work. Fischlmayr (2004) names job listings, unsolicited applications, job interviews, assessment centers, and headhunting as the more popular options. These formal ways of candidate selection are indeed employed, she writes, but in practice, informal channels of recruiting are more prevalent. It is common practice to use formal recruiting procedures for the sake of appearances only, while the actual hiring process is handled behind closed doors. Suitable employees are approached and encouraged to apply for a job that is officially advertised at a later time. Many accept the offer without actually wanting to go abroad, fearing that a refusal would have negative implications for their career, Fischlmayr (2004) found out. Employees feel pressured or even forced into expatriate work which obviously dampens their enthusiasm and motivation for cultural training and consequently integration in the host country. This can lead to expatriate failure due to low morale and personal problems, like unhappiness or even depression.

5.3 Selection

Before sending an employee abroad, it is imperative to consider all the aspects of this issue. Selection is where it all starts. The success of an expatriate depends first on how well the recruitment process is completed, Avril and Magnini (2007) write. The key to operating successfully abroad is to select the right person for the particular international task required, they continue.

In order to gain their subordinates’ respect, expatriate managers must exhibit technical competence in their field of operation, Kataria and Sethi (2013) found. Avril and Magnini (2007) point out that measuring technical competence is an easy process in many areas of business. Expatriate employees should not be selected on technical expertise alone though, Kataria and Sethi (2013) warn, but also on cross-cultural fluency. This guarantees the expatriate’s effectiveness and efficiency when working in abroad, Hill (2007) agrees, and reduces the direct
and indirect costs of expatriate failure (Kataria & Sethi, 2013). Shen (2005) also argues that expatriate failure is rarely a result of a lack of technical skills. Multinational enterprises should be looking for expatriates with cultural empathy, adaptability, flexibility, education, leadership, language skills, maturity, and finally motivation (Baumgarten, 1992). Adaptability is difficult to assess, say Avril and Magnini (2007), and therefore recommend a “holistic selection, training, and organizational support approach encompassing variables such as the expatriate’s family status, emotional intelligence, dietary and exercise habits, and his or her learning orientation is needed to enhance the odds of the expatriate’s success” (p. 53).

Spreitzer et al. (1997) created an expatriate selection instrument, called “The Prospector”, which assesses the potential of expatriate candidates on 14 dimensions. Among them are cultural sensitivity, courage, insight, risk-taking, as well as seeking and using feedback. The “Overseas Assignment Inventory” or “OAI”, is another example of an instrument used to predict success. It tries to measure expectations, open-mindedness, respect for others’ beliefs, humor, and more criteria in aspiring international executives in order to prognosticate whether the assignee to-be will do well or not once deployed abroad (Schell & Solomon, 1997).

Cross-cultural training is more effective for those with little or no prior international experience (Waxin & Panaccio, 2005), as already mentioned in Section 4.3. This makes hiring inexperienced candidates less of a liability, but previous international experience is of great importance to expatriates. Foreign work experience typically teaches an individual the ability to generate strategies for adaptation in new situations, Tye and Chen (2005) found. Research has shown that international experience fosters cross-cultural adjustment and makes expatriates less dependent on cross-cultural training provided by the company. Having access to experienced expatriate workers can be a great advantage and should be used for the good of the company.

Clearly, companies would like to hire the perfect candidate for an assignment, but in reality, such persons do not exist. There are a number of selection criteria and usually the person who fits the most of them is finally picked for the job, at least in theory. Improving selection procedures and later training and learning regimens are essential in this regard, Hill (2007), Kataria and Sethi (2013), and Shen (2005) concur.
Avril and Magnini (2007) recommend considering a candidate’s resume first. Through a resume, the level of fluency that a candidate has with a foreign language can be indicated, Peterson (2002) explains, and it can also reveal the amount of international experience a person has, Tye and Chen (2005) add. Finally the resume reveals the technical competence of the candidate, his ability to efficiently perform the task he is hired for, with its specific skill requirements.
6. Preparation

6.1 Introduction

It is difficult for firms to recruit candidates who are qualified for expatriation per se and thus training is an essential step for employees and their families. Pre-move training and cross-cultural briefings help expatriate staff adapt to their new environments quicker and better, yet most corporate training provided by multinationals is insufficient, incomplete or simply nonexistent many authors agree (Brewster, 1995; Selmer, 2000; Waxin & Panaccio, 2005). Kataria & Sethi (2013) claim that every multinational company that is serious about succeeding in this globally mobile environment provides intensive training to achieve the desired level of performance. A firm that makes an honest effort to train and develop its employees to understand, pay attention to, and honor cultural differences will surely realize the positive impact of these investments on sales, costs, and productivity (Kemper, 1998).

Evaluating the potency of expatriate training is difficult due to its qualitative nature. Even though many studies have shown the effectiveness of cross-cultural preparation, only a small number of authors have done research on what the optimal conditions required to maximize the effect are (Waxin & Panaccio, 2005).

Tung (1981) identified five different training methods and suggests that a program should be chosen according to the type of assignment. It “should be contingent to two determinant factors: the degree of similarity between the culture of origin and the host culture (which is a synonym of cultural distance) and the degree of interpersonal interaction between the manager and host country’s inhabitants, which would be linked, according to Black et al. (1992) to the role and function of the manager” (Waxin & Panaccio, 2006, p.53). The five programs are didactic training, culture assimilator, language training, sensitivity training, and field experience.

Gertsen (1990) develops four categories of training methods: “First, she identifies two kinds of training: conventional training, where the information is transmitted through a unidirectional communication, as is the case in schools and universities, and experimental training, where the trainer gets the trainees to participate by simulating real life situations. Then, she identifies two possible orientations: either the training focuses on the notion of culture in general and aims at
sensitizing participants to the notion of culture, or it focuses on one specific culture and aims at making participants more competent in that particular culture” (Waxin & Panaccio, 2006, p.53). Gertsen’s (1990) categories based on these dimensions are shown in Figure 9 below.

![Figure 9: Typology of cross-cultural training methods (Gertson, 1990, p.354)](image)

6.2 Company programs

The goal of cross-cultural training is to prepare expatriate assignees for living and working in a different cultural environment and there are a number of cross-cultural preparation programs currently used by international companies. Coping with a new environment is a much greater issue for the candidates than dealing with a new position, Kataria and Sethi (2013) say. They further argue that it is important to realize that the assignees are foreigners in the host country. It is therefore important to provide as much cultural and practical background as possible before the employee’s family is relocated for an expatriate assignment. In recognition of expatriate family issues, some multinational companies have also begun to prepare and assist families as a whole. This will be discussed more in-depth in Section 6.7. Assistance can come in many forms, predominantly preparation for the host country’s culture and language. Dedicated corporate cross-cultural training is less prevalent than one might think, especially when taking
the opinion of researchers on the topic into consideration. Orientation sessions for international assignments in companies are more common. Kataria and Sethi (2013, p.6) estimate “that 50 percent of companies who sent employees overseas were conducting pre-training and orientation”.

Kataria and Sethi (2013, p.7) write that “it is important to understand the kinds of skills expatriate managers and employees will need for international assignments. In addition to good technical skills, expatriate employees who will be working overseas need to be adaptable and have skills in languages and an understanding of social customs, cultural values, codes of conduct, and motivation and reward systems in the host country”. Assignees require assistance in everyday life too, like living, educational, financial, and health matters. Preparation programs are crucial for candidates and their spouses, particularly in cultures where women are excluded culturally from a number of aspects of daily life, Jun et al. (2001) determined. As stated in Section 4.5.2, visits to the host country can help in many regards, reassuring expatriate employees and their families about their new living quarters, health care, schools, and other important hubs of day to day life. Thus these visits do not only present an opportunity for the expatriate, but for his or her spouse and children as well.

“Acquiring the skills necessary to be successful in an international assignment can be accomplished through the use of a variety of training techniques”, Kataria & Sethi (2013, p.8) continue. The authors conclude “the training for expatriates should be led by people who have served in the specific country and that the training should begin a year before the new expatriate employee’s move to the host country’s environment” (p.8).

6.3 External programs

Rather than building a training program from the ground up, companies can also hire help from outside and outsource their cross-cultural training. Companies are outsourcing expatriate training at an increasing rate according to Allerton (1997). As with many business matters, having the opportunity to rely on experts, people who make a living of preparing expatriates and have a lot of experience in these matters, might be more effective than relying on one’s
own human resource department. It is up to each company to assess which alternative is successful and cost efficient.

6.4 Individual preparation
Aside from company paid programs, expatriates may feel the need for additional training and want to look into learning resources beyond what is offered by the parent firm. “Cross-cultural training appears to be an important factor of adjustment, especially when it comes to interaction and general adjustment” (Waxin & Panaccio, 2006, p.64). Yet companies often neglect to provide cross-cultural preparation programs to their expatriate candidates or only superficial orientation sessions. To compensate for this corporate training insufficiency, some expatriates are looking for alternative means to prepare them for their new positions. Only a minority of assignees does take these steps though, as many are not willing or able to invest the extra time. It would be shortsighted to blame this on negligence or idleness on part of the assignee, as the time before a relocation is often especially stressful already and leaves little time for individual preparation.

6.5 Training methods and types
Expatriate assignments can differ greatly and therefore Shen (2005) recommends to select training method and type, as well as training length, according to the task. Depending on the home and host culture, cultural differences can be more or less severe and thus affect relocation difficulties.

As mentioned in Section 0, Gertsen (1990) classified two types of training, conventional and experimental training. Conventional training refers to one-way flow of information or classical teaching; whereas experimental training includes simulated scenarios which should prepare expatriate candidates for the circumstances they could find themselves in during their assignment. Additionally, both training types can have two different goals: to either improve general cultural awareness without a specific culture in mind or to focus on a particular culture, most likely the host country’s.
The three different cross-cultural training methods according to Waxin and Panaccio (2005) are cognitive, behavioral (or experiential as Mendenhall et al. (1987) coined it) and affective training, as stated in Section 4.1.

6.5.1 The cognitive approach

The cognitive method employs conferences and non-participative sessions, thus merely spreading information through lecture-type orientations (Mendenhall et al., 1987). The assumption, as Campbell (1969) puts it, is that “knowledge will increase empathy, and empathy will modify behavior in such a way as to improve intercultural relationships” (p.3). The fact-orientation advocated by Brislin et al. (1983) resembles the cognitive approach, as it includes environmental briefings and culture-orientation programs designed to provide expatriate candidates with a wealth of information about the target culture, including history, geography, religion, people, and the economy. The advantage of the cognitive approach lies in its simplicity, making it readily available, comparatively cheap, and timesaving.

6.5.2 The affective approach

The affective method aims to provoke reaction, to foster self-reflection and teach the ability to cope with cultural difficulties on one’s own. It is “the learning of information or skills via techniques that raise affective responses on the part of the trainee, which results in cultural insights” (Mendenhall, 1987, p.339). “Tung’s (1981) cultural assimilation and sensitivity training as well as Brislin et al.’s (1983) attribution training and cultural awareness are also grouped together with the affective approach in cross cultural training” (Ko & Yang, 2011, p.160). Compared to the cognitive approach, the assignees are much more involved in the training process and have to play an active role during the preparation classes.

“While cultural assimilation training assists members of one culture to interact and adjust successfully with members of another culture, attribution training enables trainees to make isomorphic attribution and to handle discomfort as well as possible” (Ko & Yang, 2011, p.160,
based on Fiedler et al., 1971). This allows them to internalize the values and standards of the host culture according to Eschbach et al. (2001) and Littrell and Salas (2005). During international assignments expatriates have to create and sustain extensive connections with the locals (Tung, 1981), which means that cultural assimilation training also requires the addition of language, sensitivity, and field training to be truly effective. Furthermore, cultural awareness training is “the study of the trainee’s home culture and its effect on his/her behavior to enable the trainee to understand the nature of cultural differences” (Eschbach et al., 2001, p.272), while sensitivity training enables candidates to gain an understanding of their own values and culture (Tung, 1981).

That the trainees learn to appreciate cultural differences and are later able to execute behavior learned during the training to be more effective in cross-cultural interactions makes cultural awareness training so potent, Bennett (1986) and Brandl and Neyer (2009) agree. Yet, cultural awareness training “does not necessarily help the trainees learn anything specific about the host culture in which they will be interacting” (Bhawuk & Brislin, 2000, p.170). Ronen (1986) therefore recommends that sensitivity training may be the better tool for candidates who are expected to have considerable and serious connections with members of the host country during his or her expatriate assignment. Cross cultural sensitive training, according to Rubin (1967), also helps to reduce biases and prejudices stemming from ethnic and racial differences.

6.5.3 The behavioral or experiential approach

The behavioral method tries to teach expatriate candidates to adopt host country communication styles. As mentioned in Sections 4.1 and 6.5, this method was created to improve the information-acquiring approach, which was deemed inadequate for cross-cultural training. Experiential training, or immersion, refers to “techniques that provide realistic simulations or scenarios to the trainee, such as assessment centers, field simulations, and so forth.” (Mendenhall et al., 1987, p.339). Brislin et al.’s (1983) experiential learning and Tung’s (1981) interaction learning or field experience are also classified under the experiential approach. Learning by doing sums up the nature of the behavioral or experimental approach,
Littrell and Salas (2005) conclude. On-site visits, roleplaying, intercultural workshops, and simulations are the core methods employed in experiential learning according to Kealey and Prothroe (1996), Littrell and Salas (2005) and Morris and Robie (2001). The biggest advantages of experiential training is that it allows candidates to develop the abilities they require to perform effectively and have constructive interaction with locals, as well as foster the cognitive ability to make correct attributions, the six authors agree. Bhawuk & Brislin (2000) criticize that this fact has not been shown through empirical data yet.

Interactive learning wants “trainees to feel more comfortable with the host nationals and to learn details about life in the host country” (Eschbach et al., 2001, p.272). Another upside of experiential training is that it gets host country nationals and seasoned expatriates involved in providing information, who can offer more in-depth insights than any trainer Brislin et al. (1983) write.

Field experience, a part of the behavioral or experimental approach, “means sending the candidate to the assigned country or to micro-cultures nearby so that he or she can experience the emotional stress of living and working within different cultures” (Ko & Yang, 2011, p.161). Researchers do not agree on the optimal duration of these host country visits. Tung (1981) recommends seven days of living and working in the foreign culture in order for the trainee to fully experience the emotional stress of being part of a different environment. Naturally, field experience comes very close to pre-assignment visits mentioned in Section 4.5.2, but rather than sending the assignee and his or her family to explore the host country on their own, they would be part of a structured schedule.

6.6 Language training

Ashamalla (1998) argues that cross-cultural preparation programs should be accompanied by foreign language training because knowledge of the language of the host country is vital to successfully living and working in that country. After all, a language always carries an enormous amount of the culture it represents” (Ko & Yang, 2011, p.162). International assignments involves working and living not only with co-workers, but also with other host country nationals.
If expatriates are able to communicate in the local language, the potential for misunderstandings and misinterpretations is greatly reduced. It will take expatriates less time to adjust to the local living and working conditions as a result and will also be less stressful. Dowling and Welch (2005) agree that language fluency is an important prerequisite for expatriate adjustment and that it also positively influences work effectiveness and negotiating ability.

The literature on cross-cultural competence shows that language learning is often nonexistent or insufficient, Peltokorpi (2010) writes, and its importance to understand a culture’s values is greatly underestimated (Harzing & Feely, 2008; Peltokorpi, 2010). A recent study by Ko and Yang (2011, p.170) “suggests, however, that future research should take language ability into consideration in terms of the interrelationship of expatriate assignments, cross-cultural adjustment, and job performance. In addition, these findings may indicate that in order to facilitate the expatriates’ adjustment and to attain success in their assignments, the selection criteria should consider language ability as a top priority, and language training programs should be incorporated into the training content of the local culture”.

6.7 Involvement of spouse and family

It is not rare for expatriate managers to bring their families with them when working on international assignments, especially when these are mid- or long-term. Corporations would do well to provide preparation programs to expatriates’ spouses, since a lack of adjustment on their part can have a negative impact on the adjustment of the expatriate himself, writes Cerdin (1996). Webb (1996) suggests separate training for spouses and children as their situations are different from the expatriate’s.

It is necessary to adapt training procedures based on a person’s domains of adjustment, as everyone plays a number of different roles, based on where they are and who they interact with (Haslberger & Brewster, 2008). Navas et al. (2007) identify six domains relevant to the acculturation of immigrants:
Politics and government (systems of public order)
Work
Economic, including consumption of goods and services
Family relations
Social relations
Ideology (ways of thinking, principles and values, as well as religious beliefs and customs)

Expatriates and their families have to adjust to each domain separately and as they have different foci in life, the importance of the individual domains differs. Each family member should be prepared for what will be important to him or her later, especially because a crossover effect can occur and facilitate the transition into a new culture. The expatriate partner’s adjustment to social relations can for instance influence the expatriate’s acclimatization (Haslberger & Brewster, 2008). The authors continue that this effect can have a positive as well as a negative direction, which explains why the family situation is so important for international assignments. While positive coping behavior improves overall alignment with the new environment, unmet demands and an inability to adapt can also cause additional stress for the expatriate and influence his or her work performance or even lead to expatriation failure.

Companies generally provide language and culture training, as well as additional insurance packages for the expatriate’s immediate family (Fischlmayr & Kopecek, 2015). There are a number of other ways in which the expatriate’s spouse or partner can be supported, but most of these efforts are only made in rather generous support package deals. Options Fischlmayr and Kopecek (2015) list include, but are not limited to: support with finding a new job for the spouse in the host country or even providing a job in the expatriate’s company, compensation for lost income, financial aid with matters of education (for the spouse or the children), or hiring household helps to decrease the domestic workload.

Cross-cultural training for the accompanying spouse or family is an often neglected topic of cross-cultural preparation programs of global assignees, Barham and Devine (1991) add. Spouses are only part of 21 percent of pre-selection interviews “and only 50 percent of those
receive cross-cultural training” (Webb, 1996, p. 41). Gaining insights into a candidate’s family situation can be crucial for a company, as a pre-existing lack of cohesiveness and stability can easily escalate under the pressures of an international work assignment and lead to a premature return despite unfinished business (Webb, 1996).
7. Compensation

One of the most essential aspects of international expatriate work for companies is to develop compensation guidelines. Each company has to decide which country to base its compensation system on: the home-based-approach follows conditions in the home country, the host-based-approach considers the circumstances in the host country, and finally there is a hybrid model which tries to combine the two aforementioned approaches. An example of a hybrid system is the assumption that all expatriates belong to one nationality, regardless of their actual country of origin and are thus treated equally (Shenkar & Luo, 2008). Obviously, all of these approaches have their own advantages and disadvantages. Alternatively, companies with regular and frequent expatriate assignments might want to come up with an international compensation system that’s the same for everyone, as it makes dealing with a large number of assignees a lot simpler (Fischlmayr & Kopecek, 2015).

There is also the matter of deciding which compensation components will be established. Next to salaries, a number of subsidiaries, benefits, and extra payments are common. These can range from company paid housing to allowances for spouses and children (see Section 6.7). These compensation packages do not necessarily have to be set in stone, but can be adjusted on an individual basis. In fact, given the wide range of international assignments and their volatility, flexibility is often necessary. This should be considered when determining the expatriate’s salary. Creating an attractive “package deal” for international assignments is very important so that candidates feel they are treated fairly and are being compensated for their sacrifices (Fischlmayr & Kopecek, 2015).

Companies should also be aware of compensation gaps and the problems they can cause. Differences in salary between expatriates, as well as between expatriates and host country nationals, can lead to a host of negative feelings. Compensation packages are often based on affiliation with a particular subsidiary rather than universal criteria such as skills and experience. Compensation policies can vary significantly from one country to another and can result in feelings of deprivation which in turn lead to reduced motivation and morale (Shenkar & Luo, 2008).
8. Repatriation

Repatriation is a part of international assignments that is often and wrongfully neglected. To ensure long-term success and reduce employee turnover rates, the return and repatriation phase must be considered well before the expatriate is sent abroad. Being certain that they will have a place in their old company is a tremendous relief for candidates and surely increases the attractiveness of international assignments (Fischlmayr & Kopecek, 2015). It is also the only way to make certain that the experience and the knowledge gained is not lost but rather preserved in the firm. Despite the obvious advantages of having such a plan, many expatriates find themselves put on hold after an expatriate assignment, as management does not know what to do with them or where to put them (Webb, 1996). Thus expatriate work, which many believe to be a good way to climb the corporate ladder, does just the opposite and delays promotions.

Coming home from an international assignment means losing many benefits the expatriate enjoyed while abroad, Webb (1996) explains. The generous financial benefits are gone, as is the prestige and often improved position inside and outside the organization. Expatriate work comes with more freedom and autonomy which lead to an increase of self-esteem, but now the expatriate is brought back to reality. Oftentimes, nobody seems to care for the assignment, expatriates are not debriefed or consulted about their work at all (Webb, 1996). This phenomenon is referred to as reverse culture shock. When expatriates return home, their country, organization, family and friends have changed, and most importantly, they themselves have changed. Personal preadaptation and professional reintegration can become major issues for returnees (Marx, 2001). Nick Foster (1993, in Marx, 2001) lists the following repatriation problem areas: 37 percent of expatriates report difficulties at work due to reduced work status, 32 percent experience downward career moves and 38 percent complain of loss of autonomy (p. 133).

Many returnees decide to leave the company rather than go back to their old jobs, taking all the experience and knowledge they gained abroad with them. As stated in Section 3.6, tacit knowledge is difficult to transfer and companies would do well to reduce expatriate turnover if they want to reap the benefits of their mobility programs (Bonanche & Brewster, 2001).
9. Success evaluation

Performance evaluation is recognized as a difficult area (Suutari & Brewster, 2001), but success evaluation is an essential component of any expatriate management system. It helps to determine the effectiveness and cost-effectiveness of the system as a whole, as well as integral parts, like cross cultural training. Each subsystem evaluation is an input into the evaluation of the entire expatriate management system (Wright et al., 1996). Success evaluation can be done by local supervisors, headquarter supervisors, or even unrelated managing directors or area and country managers (Suutari & Brewster, 2001).

To be able to determine whether and how successful an international assignment was, it is necessary to figure out what success means for the company in question. As stated in Section 3.4, failure and success can mean very different things in different contexts. Based on a set of reference values which should be made clear before the assignment, management can then evaluate an expatriate’s job performance. As the performance evaluation procedures and compensation systems may change during the assignment, it is important to keep the expatriate informed and up to date. This not only motivates employees, but also helps them understand and internalize the main objectives of their international work. This increases the chances of a successful completion of the assignment (Li et al., 2009).

Closing meetings help with reducing the impact of reverse culture shock and facilitate reintegration. They also offer an opportunity to discuss the returnee’s professional future and give human resource managers the chance to learn from the expatriate’s experiences while they are still fresh on his or her mind (Fischlmayr & Kopecek, 2015).
10. Summary

The issues of international assignments and expatriate work have been carefully examined by a number of authors. Global mobility is a very current topic and due to its appeal to companies all over the world a lot of time and resources are invested into research in this area. There is a focus on general theories and the human resource side of expatriate assignments though, which is very understandable. International work can differ greatly from country to country, from company to company, from job to job, even from person to person. No two assignments are the same, as the number of variables are simply too great. The work done in the field of expatriate management surely applies to firms everywhere, but to truly discover what’s best for a certain industry or company, focus is necessary.

There are some minor points of contention regarding the best time and type of expatriate training, but all the authors affirm the necessity of proper preparation and agree that more training is better than less. There is also a broad consensus that additional preparation tools, like country visits and the integration of the assignee’s family are beneficial and should be employed if possible. Research indicates that to fully utilize expatriate programs, companies should invest in an overarching system that accompanies the candidates all throughout the international assignment cycle. Every step is as important as the last and to neglect one of them could have dire consequences for the success of the assignment. According to Vance and Paik (2002) a “one size fits all approach to expatriate preparation and training may be ill-advised” (p. 567). Depending on general principles or even cultural dimensions does not suffice, companies risk relying on methods which are unable to respond to the unique situations found in the field. Perceptions regarding management style, business methods, code of conduct, and so forth cannot be reduced to broad generalizations, managerial behaviors will affect different host country workforces in a different manner (Vance & Paik, 2002). The authors further recommend using the host country workforce themselves as a source of information which can be used to “design high content-valid, customized training for expatriate managers” (p. 567). It can thus be concluded that while the general ideas regarding expatriate management are the same for all companies, details will always have to be adapted to the situation the assignees find themselves in.
PRACTICE

As company practices often lag behind the standards theory would set, I deemed it necessary to compare the two for the sake of providing a complete overview over this aspect of global mobility management. Many authors in the field of expatriate management point towards the discrepancies between procedures on paper and actually in effect in companies around the world. Not only are firms often lagging behind the latest theoretical developments and discoveries, many do not want to adopt certain practices due to a simple reason: money. Setting up a modern expatriate program with proper selection procedures, training, on-site support, and evaluation mechanisms takes a lot of time and man power and is thus a costly enterprise. Companies are easily tempted to take the easy way out and simply stick with the programs they have (or have not) in place already, even if it means risking the success of their international assignments. This is especially true for small and medium sized firms with a small number of expatriates.

To determine how far the literature and practice overlap and where they differ, this thesis will include two excursuses on the topic of applied expatriate preparation. The first will compare the findings of a number of recent mobility surveys on the matter, while the second will highlight the situation in Austrian companies doing business in Romania based on personal interviews and questionnaires executed by myself. By taking a closer look on the global face of expatriate management first and then zeroing in on Austria, we can also compare the two and highlight potential differences.

11. Excursus I: survey meta-analysis

11.1 Introduction

In a field as rapidly changing and quickly evolving as expatriate assignments, reviewing the literature is merely a start if one wants to get an accurate grasp of what is currently occurring in companies around the world. Surveys can provide insights into modern, contemporary practices and are usually more up to date than studies based on past data. The following segment will be an analysis of a number of surveys done on the topic of expatriate assignments and highlight the trends these surveys are predicting.

The companies involved in the studies come from an array of different fields of business and vary in size and structure, which is reflected in the size of their expatriate programs, as seen in Figure 10 and Figure 11.

Compared to 2013, the growth rate of the number of international assignees has remained stable. 45 percent of companies reported an increase in expatriates, 26 percent a decrease. 29 percent of firms answered that the numbers stayed the same (Brookfield Global Relocation Services, 2015, p.23).
11.2 Trends

11.2.1 Growth

All the surveys point towards further increase of expatriate work in the future, as the mobility of talent becomes even more important than it already is today. Due to the constantly changing global business environment, being able to react quickly and globally has become a crucial requirement for lasting success. Additionally, more and more companies are looking beyond national borders in their search for new customers and push into emerging markets to fuel their growth (Brookfield Global Relocation Services, 2015; Johnson, 2016; KPMG International Cooperative, 2015).

Due to an ever increasing complexity of international work and growing regulatory pressures from governments around the world, compliance is essential. Not staying up to date with recent developments can quickly endanger a firm’s future success. As a result of this advanced pace in international business practices and the soaring need for mobility and flexibility, high quality mobility strategies and programs are required now more than ever, all the surveys indicate.
Most of the participant companies also expect the expatriate population to further increase in the future which makes having a solid foundation a necessity for going forward. As a result, about nearly half of the companies involved in the studies expect their assignee population to grow in the future, while only 15 percent expect to downsize during the coming years, as shown in Figure 12 and Figure 13 (Brookfield Global Relocation Services, 2015; Johnson, 2016; KPMG International Cooperative, 2015).

As a result, attracting, retaining and developing talent has become a core component for many corporate strategies. Having access to leadership talent with global perspectives allows firms to leverage their competitive advantages internationally while growing their employees at the same time. Mobile employees have truly become the core of many business operations worldwide (Brookfield Global Relocation Services, 2015; Johnson, 2016; KPMG International Cooperative, 2015).

11.2.2 Underutilization of talent based tools

The Brookfield Global Relocation Services survey (2015) showed that despite the aforementioned facts and the obvious importance of well-rounded expatriates, companies are hardly leveraging their talent pools to make sure to start off assignments the best they can, a matter also bemoaned by many authors mentioned in this thesis.
The authors cited in Section 5.3 highlight the importance of finding the right candidate, as personality and motivation play a crucial role in the success of expatriate assignments and are personal characteristics which are difficult to alter with training. Finding someone with not only technical skills and experience, but also “the right mix of adaptability and global communication skills” (Brookfield Global Relocation Services, 2015, p.9) is paramount for success. Companies eager to improve their expatriate strategies and programs might want to take a second look at how they select their candidates in the first place and what they offer in terms of career management. Making use of this opportunity for improvement might give them a competitive edge over other global players. There is much room for advancement and growth in this area of expatriate management (Brookfield Global Relocation Services, 2015).

11.2.3 Cost pressures

Both Johnson (2016) and the Brookfield Global Relocation Services (2015) survey mention the increasing economic pressures on mobility and expatriate programs. “74 percent of
respondents reported that they had to reduce international assignment costs during the past year in response to economic pressure” (Brookfield Global Relocation Services, 2015, p.11). Continuously improving cost performance has been a necessity during the financial crisis and its aftermath, but cost cutting has not let up since then. Strategic long term thinking and efficiency are required to allow for cost reductions that do not hurt international programs, thus leading to a net loss for the company. This is especially true for the ongoing competition for talent, which is expected to become even fiercer in the future as expatriate programs continue to grow (Brookfield Global Relocation Services, 2015; Johnson, 2016).

Figure 15: Cost management practices (Brookfield Global Relocation Services, 2015, p.12)

Given this cost pressure, it is strange that many companies do not have cost management practices in place. Cost tracking during the assignment helps with keeping costs under control, while having a solid cost estimate for all assignments allows companies to predict future spending. Cost benefit analysis on the outset of expatriate assignments seems like a logical thing to do to figure out whether the enterprise is even worth the investment. Figure 15 shows the surprisingly low numbers for each of these cost management techniques. Not understanding costs and cost drivers in a mobility program can seriously damage international work and limit its strategic impact (Brookfield Global Relocation Services, 2015; Johnson, 2016).
11.2.4 Requested assignments

Employees volunteering for assignments are a trend that could help in this regard, as it allows companies to meet compliance needs while staying highly cost effective. All three surveys report a growing awareness of the opportunities expatriate work offers among young employees. The current numbers of assignee requested assignments are still comparatively low, but companies are quickly picking up on the trend, adapting their expatriate work to meet the new demands of developmental international work assignments (Brookfield Global Relocation Services, 2015; Johnson, 2016; KPMG International Cooperative, 2015).

![Figure 16: Assignment types currently used in percent (KPMG International Cooperative, 2015, p.13).](image)

According to the Global Mobility Trends survey, 77 percent of respondents believe that having international assignment experience has real and lasting value for career development.
Expatriates gain valuable knowledge and skills that will help them get faster promotions, higher performance ratings and other advantages over colleagues with no assignment experience. Volunteers for international positions are not only highly motivated, but also cheaper than employees who have to be convinced to move abroad. Firms which do a good job at reducing hurdles for assignees requesting to be put on international assignments will most likely see a significant impact on their international success (Brookfield Global Relocation Services, 2015).

11.2.5 Family involvement

While the necessity of expatriate preparation has been widely accepted in the literature (see Chapter 4), not all companies run such programs. Still, the firms that do not train their assignees, no matter the circumstances, have become a small minority. It appears that it has become the standard to employ expatriate preparation programs across all fields of business involved in the surveys (Brookfield Global Relocation Services, 2015; Johnson, 2016; KPMG International Cooperative, 2015).

There is no consensus on the matter of family involvement though. The GMTS survey by Brookfield Global Relocation Services (2015) shows that “family concerns were the single most noted reason for assignment refusal” (p.16). Creating an assignment package that addresses a family’s concerns rather than a single person’s is challenging and also more expensive. Modern family structures have become complex, but what is more important is that today, most spouses have their own job and career to watch out for. Naturally these issues become worse the longer the assignment lasts. Dual income households suffer greatly from the loss of one income when the spouse has to quit in order to follow the expatriate (Brookfield Global Relocation Services, 2015; Johnson, 2016; KPMG International Cooperative, 2015).

Mobility leaders expect these issues to become even more important in the future, Brookfield Global Relocation Services (2015) report. Spouse and partner career concerns negatively impact companies’ abilities to attract suitable candidates. Only 35 percent of firms provide any career planning services for family members (Brookfield Global Relocation Services, 2015, p.17).
Figure 17: Frequency of cross-cultural training (KPMG International Cooperative, 2015, p.44).

Figure 18: Average assignment length (KPMG International Cooperative, 2015, p.38).

Figure 19: Cross cultural training policies (KPMG International Cooperative, 2015, p.43).

Figure 20: Language training policies (KPMG International Cooperative, 2015, p.42).
11.2.6 Expatriate failure

The studies further revealed that according to the partaking companies, only a small number of expatriate assignments can be considered failures. Compared to the estimates in Chapter 13 which went up to 70 percent (Sims & Schraeder, 2004), these percentages are incredibly low.

![Percentage of failed expatriate assignments](image1.png)

What is also interesting is that the number one reason for expatriate failure, according to Brookfield Global Relocation Services (2015), is assignees leaving to work for another company. Only 16 percent of failed assignments are due to inadequate job performance (Brookfield Global Relocation Services, 2015, p.59).

11.3 Summary

Comparing the KPMG International Cooperative, GMTS and GMT surveys revealed that overall, most companies have embraced the recommendations given by the literature on the topic of expatriate management. Due to the perceived importance of expatriate assignments, assignees are given a lot of training and other forms of help. A steadily increasing number of firms are also
including the expatriates’ spouses and families, a strategy very much recommended by the theorists on global mobility.

The two problem areas identified in the surveys are candidate selection and cost management. Despite the importance of selecting the right people for assignments, many companies rather invest in training than in better selection procedures it seems. Spreitzer et al. (1997) and Schell & Solomon (1997) recommended using their selection instruments specifically to determine whether a person was suited for international work or not. Some personality aspects are very difficult or even impossible to change with training and it appears to be prudent to assess this before investing time and money into a candidate.

The high quality of expatriate training goes hand in hand with high costs and cost management is always a concern for every company. Unfortunately, calculating costs can become rather complicated. While active cost tracking during assignments is less difficult, cost-benefit analysis is a much more complex and tricky procedure. Calculating accurate cost estimates is also something that requires much experience in mobility matters and seems especially difficult for small and medium sized companies a small expatriate population.

Finally, the biggest and most glaring difference between theory and practice was the frequency of expatriate failure. Based on the numbers in the surveys, expatriate failure is mostly a thing of the past and has become less of a threat to companies. With percentages of 5 percent and less, failed assignments move from a major concern to a minor annoyance at best. Further research would be needed to determine how and when this change occurred.
12. Excursus II: inquiries in Austrian companies

12.1 Method

To gain insights into the workings of successful international companies and their ways of conducting international business, I have already reviewed a number of surveys. To get an even closer look at the inner workings of firms and their expatriate programs, the method fitting best are exploratory interviews. This method of inquiry gives a rough framework while leaving enough leeway to react to new information. This allows me to highlight a specific set of countries with people in the same field of employment. Excursus II will reveal potential issues relevant to companies in Austria in this specific context.

Unfortunately, the response I received requesting interviews was extremely meager, after contacting scores of companies over the course of several months I could not meet the required number of interviews with expatriates ex-post necessary for a well-grounded comparison. To increase the amount of data relevant to my work, I also created a questionnaire for those who were unable to take the time for an interview, but willing to participate. Both the interview guide and the questionnaire can be found in Section 12.1.3. Despite my efforts to include more people in the study, only a limited number invited me to interview them or answered the questionnaire. Excursus II can therefore not claim to give an overview of the situation in Austria in general, but only highlight the circumstances in the particular companies the respondents belong to.

I chose qualitative in-depth interviews as the method of data collection for this diploma thesis for two reasons. First, it allows participants to describe their experiences of their expatriate assignments freely. Second, it allowed me to get as rich and detailed information as possible, which increased the quality of the study. Rossman and Rallis (1998) write that an in-depth interview enables conducting a “guided conversation with a goal of eliciting from the interviewee rich, detailed materials” (p.18). Obviously, the approach I had to fall back on after being unable to conduct a reasonable number of interviews is inferior to a greater number of in depth interviews only, but the wider range of materials incorporated into my research allowed
for a broader angle of view and should provide at least an insight of what is happening in some Austrian companies.

12.1.1 Participants

A number of selection criteria was adopted to enrich the collected data and make it more holistic, as well as congruent. To ensure in-depth exploration and understanding, as well as comparability, the questioned expatriate managers:

- Have been working for an Austrian company
  - With subsidiaries or joint ventures in Romania
- Have been on an expatriate assignment to Romania

As already mentioned, only a small number of respondents were willing to participate. I conducted two interviews and received one answered questionnaire. All participants were part of business to business building material and capital goods companies. One participant was female, two male, and all of them between the ages for 30 and 40.

12.1.2 Austria – Romania

The size and geographical position of Austria have always been compelling reasons for the country to be open towards traveling and trade. Austria’s business landscape is dominated by small and medium enterprises and has the comparatively large industry sector. International trade is particularly important for small national economies like Austria which explains the importance government places on international relations. The most important export partners are Germany, Italy, Switzerland, and Hungary. Nearly two thirds of the Austrian exports stay in the European region (Fischlmayr, 2004).

Romania is the largest market in Eastern Europe and has been a target market for Austrian investments for quite some time. The country offers a number of favorable prerequisites in a variety of business sectors and is additionally attractive due to its cultural and geographical proximity to Austria (Lukavsky, 2014).
Austria is one of the top investors in Romania, second only to the Netherlands. During the last decade, Romania has begun ambitious modernization plans, which created opportunities for joint projects, often financed by EU-structural funds. Compared to Austria, taxes and labor costs are very low which again contributes to the attraction of the market (Lukavsky, 2014).

![Graph showing Austrian exports and imports to/from Romania from 2007 to 2013.](image)

*Figure 23: Austrian exports to / imports from Romania (Lukavsky, 2014, p.2).*

Despite the many advantages of the Romanian market, there are a number of downsides to the Eastern European country. Policy changes can be quite unpredictable due to political instability, black labor and illegal employment is still an issue, and skilled labor is highly contested as all international investors are fighting over the small workforce (Lukavsky, 2014). Romania has also suffered during the financial crisis of 2008 and is only slowly recuperating from the loss of foreign direct investment during this period of economic strife.
<table>
<thead>
<tr>
<th>Country</th>
<th>Government effectiveness</th>
<th>Regulatory quality</th>
<th>Rule of law</th>
<th>Control of corruption</th>
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<tbody>
<tr>
<td>Austria</td>
<td>93.8 %</td>
<td>92.9 %</td>
<td>96.2 %</td>
<td>93.8 %</td>
</tr>
<tr>
<td>Romania</td>
<td>51.0 %</td>
<td>70.5 %</td>
<td>57.5 %</td>
<td>53.8 %</td>
</tr>
</tbody>
</table>

*Figure 24: Worldwide governance indicators (Dietachmair & Sternad, 2011, p.5).*

12.1.3 Instruments

*Interview protocol*

The interviews primarily focused on the interviewees’ personal experiences and their assessments of their assignments. The semi-structured interview questions covered four main topics: [1] cross-cultural preparation, [2] the impact of cross-cultural preparation upon their adjustment to the living and working environment, [3] assessment of the success of an overseas assignment, and [4] their personal opinion on how the preparation could be improved. The questions in regards to adjustment were asked in a way meant to identify what the participants experienced as most stressful while abroad and how well, psychologically and behaviorally, they were able to deal with the circumstance abroad.

*Self-evaluation*

The participants were further asked to self-evaluate their job performance based on open-ended questions. I wanted to know how they rated their performance in their relations with the host culture, as well as in regards to company goals. Did they think they effectively established lasting and meaningful relationships and communicate with host-country nationals inside and outside of the work environment? Did the expatriates think that they carried out their responsibilities while on the assignment?

Additionally, the expatriates were questioned about the evaluation process on part of the company, how their performance was reviewed and assessed. I also put emphasis on how this success evaluation was conveyed to the interviewees by their superiors - was there a final
meeting after the assignment was over, did they receive any feedback concerning their performance, where they praised or reprimanded based on the evaluation they received?

Interview guide
The interview guide briefly covers the expatriate’s personal information and his or her tasks and responsibilities abroad, then proceeds to go more in-depth in a number of topics: Why the interviewee decided to do expatriate work; what his or her preparation looked like and what his or her company offered in terms of training; how his or her assignment went; if and how success was measured; what he or she would change (in hindsight) in regards to his or her preparation; and finally, how the repatriation process went. For further details, please consult Appendix A.

Adapted questionnaire
Some of my respondents were willing to help, but unable to schedule time for a personal interview due to time constraints or geographical distance. In order to allow them to participate, I adopted my interview guide into a questionnaire the persons in question could fill out on their own and in their own time. Naturally, questionnaires are much more limited than personal interviews, as they cannot be adjusted to each individual, but they still gave valuable insights into the practices of Austrian companies and gave me an alternative when personal interviews were not an option. The detailed questionnaire can be found in Appendix B.

12.2 Procedure
12.2.1 Data collection
Data was collected through semi-structured interviews and questionnaires to enable me to make the most of the “strengths of each type of data collection while minimizing the weaknesses of any single approach” (Patton, 1990, p.245). The interviews were semi-structured to allow interviewees to talk freely and describe their experiences feelings, while an established set of questions made sure no important topic was left out. I wanted to know how they perceived, acted, behaved, and interacted during their assignments. Notes taken during the
interviews helped me ask more in-depths questions if I felt the need to and adapt future interviews according to information gained.

12.2.2 Data analysis

Due to the limited number of interviews and questionnaires, I cannot claim to offer comprehensive data set for analysis. I compared the responses each interviewee gave, trying to find congruent answers and determine the causes for these matches. By clustering the according responses, I was able to collate them to the topics relevant to this diploma thesis.

12.3 Findings
12.3.1 Motivation and application

The most common reason for accepting an international assignment named by the expatriates I interviewed was the opportunity for career advancement, going along with what the literature cited in this work already indicated. The positions abroad had a higher standing in the company and came with more independence and responsibility for every participant. Increased pay or other financial incentives were not among the reasons given why people opted for international work. Expatriate assignments were seen as an opportunity, a chance for personal growth and becoming a more valuable asset for the company.

The paths towards being offered an international assignment differed greatly though. One interviewee chose a particular company explicitly because they wanted to go abroad sometime during their career.

„Für mich war es eigentlich durch mein Studium klar, dass ich unbedingt eine Zeit lang im Ausland leben und arbeiten möchte [...]. Mein damaliger Vorstand schlug mir den Auslandseinsatz [mit Vorbehalten] vor, [...] ich wollte aber dann unbedingt nach Rumänien.“

Another one simply accepted the assignment when the opportunity arose.
There has also been a case where expatriate work was required by the company and the participant basically had no other choice but to leave Austria.

In each of the cases, regardless whether the participants had planned to do expatriate work sometime in the future, no application process took place. The positions were not advertised publically or internally, everybody was approached in person with an offer to go abroad, a scenario already described by Fischlmayr (2004). This author (2004) also suggested that some employees feel pressured into accepting an international position, an impression that I did not get from anyone involved in my research. All of the participants said they were eager to tackle this challenge and the expatriate jobs were seen as a chance rather than a burden.

12.3.2 Selection

In most of the cases the candidates were predominately selected based on prior experience in the region. Having already worked or even lived in the country they were sent to, the expatriates could adapt more easily and needed less preparation than someone who had had no contact to the guest culture before his or her international assignment.
Only one of the respondents had no previous ties to Romania and were selected based on merit in other areas. Still, all of them had been part of the company already and were not recruited from outside the firm once the position became available.

12.3.3 Preparation

The most obvious discrepancies between the literature and the actual situations the participants found themselves could be found in the preparation phase. As shown in Chapter 4 and 6, experts agree that expatriate preparation is a crucial stage of any international assignment and research confirms the importance of expatriate training. As mentioned before, Kataria & Sethi (2013) go as far as to say that every international company that takes international work seriously provides comprehensive training, as the effects on expatriate success are easily quantifiable. As many studies before (Brewster, 1995; Selmer, 2000; Waxin & Panaccio, 2005), my research has confirmed once more that the levels of training provided for expatriate candidates in some companies are nowhere near what the literature suggests. Due to the small sample size, these findings should be taken with a grain of salt, but not a single person involved in my exploratory study received any kind of cross cultural training before being sent abroad. No cultural awareness training took place, not in company programs or provided by outside sources. Neither did any of the interviewees take language classes, despite the particular importance the literature puts on language abilities. Fischlmayr and Kopecek (2015) state that most companies as well as expatriates are aware of the importance of speaking the local language, as it facilitates getting in touch with the locals, adaptation to the host culture.
and business meetings and discussions. It can also serve as an important icebreaker when approaching local colleagues and employees. Nevertheless the companies in question didn’t offer any training or give the candidates time to set up something on their own.

„Da gibt es bei uns leider nichts. Es gibt bei uns weder in Sprachtraining davor, noch ein Führungstraining. Es gibt auch keine Unterstützung in Bezug auf Steuern, Wohnungssuche, und so weiter."

„Der Sprachkurs vorab, der hilft bedingt, weil in den meisten Fällen hat man noch einen alten Job zu übergeben. Die Wahrscheinlichkeit ist sehr, sehr gering, dass man die Zeit hat, vorher noch einen Sprachkurs zu machen, bevor man runter kommt."

The last quote implies that no time was allocated for language training during the candidate’s work schedule. Rather than being able to prepare for their international assignment, they had to deal with the stress of handing off their current job to their successor, limiting their own chances for success in the process.

Most of the expatriates did not experience their lack of language skills as a hindrance though, as they found it rather easy to communicate in English, even outside of their professional settings. The Romanian populace thus alleviated the lack of training by being competent in a foreign language themselves.

„[…] wir haben dort in Rumänien auch Unternehmenssprache Englisch mehr oder weniger fix gehabt.“

„Im Alltag war [der Mangel an Rumänisch Kenntnissen] kein Problem, etwa beim Einkaufen, […]?“

„Ohne Probleme in Rumänien, wesentlich besser als in Österreich würde ich sagen. “
In one case the time between the job offer and the departure date was extremely short, making any form of training impossible in the first place. The urgency of the task might explain the lack of structured training, but not the absence of support on-site shown further below.

According to Kollinger (2005), prejudices of host-country nationals against female managers are an often named reason for not selecting women for international work. It was interesting to hear that despite assuming and actually pointing out that being female might lead to extra challenges when working in Romania, no training was offered that would have helped the women interviewed deal with these issues.

12.3.4 Training for spouses and family

In none of the cases family members were relocated with the expatriates, which made additional training for spouses or children largely unnecessary. The interviewees were either not in a relationship at the time of their international assignment or left their significant other at home. Those who opted for long distance relationship pointed out that their new positions put quite some strain on their personal relationships though.
12.3.5 Assistance abroad

The expatriates mostly found themselves on their own; the companies involved in my study did not seem to conduct any sort of reconnaissance in the countries. The candidates had to work out everything themselves, including business and social networks. The preparation component of information giving on part of the company, such as practical information on living conditions in the destination country, area studies, and cultural of the honest information was completely lacking. Naturally, this means that the second stage of cultural orientation according to Harrison (1992), specific cultural orientation, was omitted across the board. The goal of this part of the preparation process is to develop the trainees’ ability to interact effectively within a specific culture he or she is assigned to and consists of two phases: knowledge acquisition (retention) of the language and customs in the specific culture and skill training (reproduction) in the application of appropriate behaviors (Shenkar & Luo, 2008).

Prior work experience in the country only partially prepared the expatriates, as it couldn’t account for the everyday living and work conditions they had to get accustomed to.
Jassawalla et al. (2006) pointed out the many advantages of having a mentor in the company who helps with the preparation process and the work abroad. For many of the expatriates I talked to a mentor or at least someone with experience they could have relied on would have been a tremendous help. Setting up communication with the home office, important resources abroad and the networks already in place is one of the biggest stress factors for new expatriate managers early during expatriate assignments and mentors can help facilitate this important step, Jassawalla et al. (2006) conclude.

As mentioned in Section 12.3.2, the companies involved in my study often picked employees who already were familiar with the country before sending them on longer expatriate assignments, most likely assuming that their professional experience would be preparation enough. The candidates were able to gather experience during joint projects, team and group work, and shorter stays in the countries they would eventually be stationed in.

Nevertheless, the expatriates were faced with a completely new set of challenges, as their international positions did not have much in common with the work they had done before being sent abroad. As common with expatriate assignments, they had to deal with an increased amount of responsibility and pressure in a different culture, all without any preparation to speak of.
As a result of their new positions and due to the nature of their assignments, one of the interviewees experienced staffing friction early during their stay abroad. The quote above already mentions that employees had to be terminated, as they couldn’t or wouldn’t continue working under the new supervision.
Fortunately for the expatriates, nobody experienced any difficulties with being accepted by his or her new environment and all of the interviewees quickly found a new circle of associates and friends whom they would spend their free time with.

„Und in Bezug auf ihr Privatleben, alleine in der Wohnung sitzen ist ja auch langweilig?“

„Stimmt auch wieder, aber auch das war in Rumänien sehr lässig. Es war ein sehr junges Team und es fand sich immer jemand, mit dem man Essen ging oder zum Beispiel Fußballspielen [...] oder was auch immer. Ich bin ganz selten alleine im Hotel gesessen oder dergleichen.“

„Die Eingliederung ging also fließend?“

„Absolut, ich war komplett integriert, [...]. Das ist auch nicht selbstverständlich, das war in anderen Ländern, in denen ich war, nicht so. Dort wurde man [...], wenn man die Firma verließ, verabschiedet, dann war man essen und konnte sich auf das Zimmer setzen. Aber das war in Rumänien immer anders.“
An institution that received much praise and was described as very helpful was the Austrian Business Club, organized by the Austrian Chamber of Foreign Trade.

Despite the cost free advantages that come with joining such an institution and its long history (the club was founded in 2003), the expatriates had to discover it themselves or through word of mouth. None of them were informed of its existence by their superiors before their international assignments.
12.3.6 Success evaluation

Another significant difference between what the literature recommends and what is actually happening in Austrian companies involved in my research is the clear lack of performance evaluation or meetings at the end of international assignments in some cases. The positive effects of success evaluations on both future assignments and the expatriates have been discussed in Chapter 9. No matter if a final meeting took place, the interviewees considered it important and would have liked to have one.

„Ein abschließendes Gespräch fand also schon statt und gehört auch dazu.“

Despite the importance the literature places on properly closing international assignments, some expatriates never got their wish. They were swiftly ushered into their new position without reflecting on their time abroad.

„Wurde dieser Erfolg in irgendeiner Weise kommuniziert? Gab es Abschlussgespräch, hat ihnen ihr Vorgesetzter Lob ausgesprochen?“

„Nein (lacht), nein, Lob (lacht), Lob bekommt man vielleicht alle 15 Jahre einmal (lacht). Nein, alle fünf Jahre, nein nein (lacht), der war gut. Meine Firma war er der Meinung, sie müssen mich belohnen, indem sie mich nach [anderes Land] schicken. Für die Firma war das hierarchisch gesehen ein Aufstieg. Nur selber habe ich das nicht so empfunden.“

12.3.7 Repatriation

As pointed out by Fischlmayr & Kopecek (2015), the international assignments did not lead to career advancement for the candidates. Part of them returned to the positions they held before going abroad, some were rotated into more international, mostly expatriate work. The interviewees did point out that they were aware of the situation beforehand and that they did not expect to return to a position equally as prestigious as the one they held abroad.
The clear lack of career planning did not seem to be a cause for concern for the expatriates I interviewed, they all accepted the temporary nature of their assignments and resigned themselves to the fact that they would have to quit if they wanted to get a job on par or better with their expatriate position.
12.4 Discussion

The interviews I conducted paint a dire picture of the expatriate situation in these Austrian companies. The actual situation in the firms does not match the suggestions found in the contemporary literature. There is ample evidence that the preparation phase, generally assumed to be the most influential on expatriate success, is badly planned or simply nonexistent, the time before international assignments is rarely utilized and training procedures are lacking in many regards. It would seem advisable for the companies the interviewees belong to to review their mobility programs and maybe improve their training procedures.

The authors quoted in Section 4.3 all stressed the significance of well-structured and extensive expatriate training and yet none of the interviewees received anything remotely close. There was no language training nor preparation for the new position with its new responsibilities and duties, no pre-departure visits nor cultural sensitivity training. There was no need for involving other family members in the cases of the interviewees, but there wouldn’t have been options in place if there had been. There were no plans to prepare spouses or children, and as the expatriates were mostly left to fend for themselves once abroad, it is prudent to assume the same would have been true for their families. Haslberger and Brewster (2008, p.324) report that roughly 60 percent of expatriates are accompanied by a spouse and 50 percent by children. These numbers clearly show the significance of being ready to prepare the expatriates’ families as well as possible, given their impact on expatriate success explained in Section 6.7. Expatriates families are faced with a greater number of challenges than single expatriates, but they also have the “capabilities to go above and beyond those of individuals” (Haslberger & Brewster, 2008, p.335).
Another issue that emerged during the interview process is the lack of assistance and networking on-site which was repeatedly mentioned as a source of frustration and unnecessary complications. International assignments as an emergency measure to swiftly deal with brewing troubles obviously bedevils relying on existing structures, but the additional pressures make it that more important. While most expatriate assignments are more forgiving and allow for learning over time, crisis management requires immediate action as the core capabilities of the company are under threat. Having to go into such situations blindly and without local support poses a serious hazard to the success of the operation.
13. Conclusion

This diploma thesis aimed to give an overview over the theory on the topic of expatriate management and how it compares to the actual situation. Excursus I showed that firms are largely following the recommendations given by scientists and are continuously improving and adapting their mobility programs. There were some issues in regard to candidate selection and cost management that could be improved, as the studies pointed out. These are areas for future development that offer an opportunity to gain a competitive edge in a field that is becoming ever more competitive.

The data gathered in Austrian companies shows a different picture. Despite the obvious restrictions of Excursus II, the participating companies regularly send people abroad and the discrepancies between the literature (and the survey data) and what happens in the participating companies are definitely significant. With the amount of research done on the matter and the fact that all of it came to nearly the same conclusion - which is the importance of expatriate training and ongoing support - it appears all but negligent to continue ignoring these recommendations. Austria is a country with many international business ties and high foreign investments and the companies the interviewees were part of are well known international players which makes the use of such outdated procedures quite perplexing. According to the survey data, international competition is increasing in several global mobility areas, be it the contest for rare talent, new markets, or cost leadership. To remain competitive in the future, the firms participating in the study should try their best to catch up to the rest of the field at least.
14. Limitations and recommendations

This study is not without limitations. The limited scope of a diploma thesis did not allow for a more in-depth approach, which means that the number of surveys examined was limited. The small number of interviews was more a result of the unwillingness of companies to participate. In order to make the information more easily comparable, all interviewees were part of the same industry, which further constrains how comparable the conclusions drawn from the interviews are to the overall situation in Austria. Additionally, information collected from the retrospection of the interviewees is always subjective and may thus lead to oversights and gaps that could weaken some of conclusions of the thesis. There might have also been an unwillingness to report the whole truth, as interviewees feared repercussions if they blamed a lack of training for their bad performance. I do believe that the interviews painted a clear picture despite these limitations though, as the descriptions of the expatriates involved were very much alike and conclusive.

The literature research revealed a lack of options in expatriate literature on Austrian management procedures, as most data is from either US-based companies or based on cross-country data. The interviews showed that there are ample differences between the theoretical foundation established by research and the actual situation in Austrian companies, calling for further research specifically tailored to the Austrian market. The surveys did not specifically say where the firms that took part in them are from, but rather gave numbers based on regions. It would be interesting to see how the data gathered in Austria compares to information gained from the interviews.

My diploma thesis hinted towards some discrepancies which, if further pursued, might reveal more interesting information and potentially useful data. A larger study, involving more companies and more interviews per firm would be necessary to really draw conclusions on the situation in Austria.


APPENDIX A - Interview guide

Persönliche Daten

Name
Geschlecht
Alter
Zeitpunkt und Dauer des Auslandseinsatzes
Wie lange im Unternehmen, als er / sie ins Ausland ging
Wievielter Einsatz
Aufgaben
Wieso haben Sie sich für einen Auslandseinsatz entschieden?
Wie haben Sie sich auf Ihren Auslandseinsatz vorbereitet?
Was wurde Ihnen von Ihrer Firma angeboten?
    Kulturtraining (firmenintern oder extern, Dauer)
    Sprachtraining (firmenintern oder extern, Dauer)
    Besuch
    Kontakt zu Ehemaligen
    Zuweisung eines Mentors
    Wurde Familie eingebunden
Was haben Sie selbst (zusätzlich) unternommen?
Wie gut ging es Ihnen während des Einsatzes?
    Kulturschock
    Kollegen / Vorgesetze
    Neue Aufgaben
    Stress
    Familiäre Probleme
Erfolg der Entsendung
    Denken Sie, dass Ihre Entsendung ein Erfolg war?
    Denken Ihre Vorgesetzten, dass die Entsendung ein Erfolg war?
    Wie wurde der Erfolg bemessen?
Falls Erfolg: Wurde er belohnt?

Falls Misserfolg: Welche Konsequenzen?

Im Nachhinein betrachtet, denken Sie, dass Sie besser vorbereitet hätten sein sollen? Was hätte Ihnen weiter geholfen?

Von Firmenseite

Von eigener Seite

In Bezug auf die Familie

Wiedereingliederung

Würden Sie es wieder tun? Würden Sie es Kollegen empfehlen, einen Auslandseinsatz zu wagen?

Sonstige Anmerkungen
APPENDIX B – Adapted questionnaire

Persönliche Daten

Name

Alter

Zeitpunkt und Dauer des Auslandseinsatzes

Wie lange waren Sie im Unternehmen, bevor Sie ins Ausland entsandt wurden?

Ihr wievielter Auslandseinsatz war die Arbeit in Rumänien?

Welche Aufgaben hatten Sie inne?

Wieso haben Sie sich für einen Auslandseinsatz entschieden?

Welche persönlichen beziehungsweise beruflichen Ziele haben Sie verfolgt?

Wie haben Sie sich auf Ihren Auslandseinsatz vorbereitet?

Was wurde Ihnen von Ihrer Firma angeboten? Gab es zum Beispiel

Kulturtraining (firmenintern oder extern, Dauer)

Sprachtraining (firmenintern oder extern, Dauer)

Besuch des Landes vor dem wirklichen Einsatz

Kontakt zu Ehemaligen

Zuweisung eines Mentors

Was haben Sie selbst (zusätzlich) unternommen?

Wurde Ihre Familie eingebunden und falls ja, wie?

Wie gut ging es Ihnen während des Einsatzes?

Erlebten Sie einen Kulturschock?

Wie lief es mit Kollegen und etwaigen Vorgesetzten?

Wie kamen Sie mit Ihren neuen Aufgaben zurecht?

Hatten Sie Stress und wie gingen Sie damit um?

Gab es familiäre Probleme (hierzu zählen auch Probleme des Lebenspartners oder der Kinder bei der Eingliederung in die neue Umgebung, die Wohnsituation, den neuen Beruf oder die neue Schule, und so weiter)?

Erfolg der Entsendung

Denken Sie, dass Ihre Entsendung ein Erfolg war?

Denken Ihre Vorgesetzten, dass die Entsendung ein Erfolg war? Wie wurde das Ihnen gegenüber geäußert?
Wie wurde der Erfolg bemessen?

Falls Erfolg: Wurde er belohnt?

Falls Misserfolg: Welche Konsequenzen?

Im Nachhinein betrachtet, denken Sie, dass Sie besser vorbereitet hätten sein sollen? Was hätte Ihnen weiter geholfen?

Was hätte das von der Firma zur Verfügung gestellte Training inkludieren können? Auf was wurden Sie nicht (ausreichend) vorbereitet?

Was hätten Sie selbst machen können, was Ihnen während des Auslandseinsatzes geholfen hätte?

Hätten Sie Ihre Familie besser vorbereiten können?

*(Bitte erinnern Sie sich an etwaige Probleme und Stressfaktoren während Ihres Einsatzes und fragen Sie sich, ob Training Ihnen helfen hätte können. Was zum Beispiel würden Sie jemandem raten, der bald eine ähnliche Position wie Sie übernimmt?)*

Wiedereingliederung

Gab es nach Abschluss Ihrer Auslandsarbeit ein Abschlussgespräch oder Meeting?

Heimkehrende Auslandsentsandte klagen oft über den Verlust von Verantwortung / Prestige / Einkommen, da keine Stelle im Unternehmen frei ist, die der im Ausland entsprechen würde und der alte Job vergleichsweise „schlechter“ ist. Hatten Sie ein ähnliches Gefühl?

Blieben Sie in Ihrer alten Firma oder haben Sie zu einer neuen gewechselt?

Würden Sie es wieder tun? Würden Sie es Kollegen empfehlen, einen Auslandseinsatz zu wagen?

Sonstige Anmerkungen