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## International assignment success: a thematic analysis of proximal salient stakeholders' accounts of enablers and outcomes

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**UNIVERSITY of LIMERICK**

O L L S C O I L L U I M N I G H

**International Assignment Success: A Thematic  
Analysis of Proximal Salient Stakeholders' Accounts  
of Enablers and Outcomes**

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of Limerick

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## *ABSTRACT*

This thesis focuses on the area of international assignment success from the perspective of five proximal and salient organisational stakeholders in the global assignment cycle. A significant body of academic literature exists in the domain area of expatriation; however, there remains a paucity of research dealing with the issue of success. Many factors impact on the success of an international assignment, and a variety of stakeholders are pivotal to the process at different stages, each with differing agendas and touch points. Whilst a multi-stakeholder view is espoused in the literature, however, to date the multi-stakeholder approach has been neither incorporated nor empirically investigated. This research aims to begin to close these empirical gaps by elucidating international assignment success through the lens of multiple proximal stakeholders.

The proximal salient stakeholders selected for inclusion in the research are expatriates, repatriates, human resource specialists, global mobility specialists, and host country line managers involved with the international assignment process. The research is underpinned by a qualitative research methodology. A detailed thematic analysis of semi-structured interviews teases out the main success criteria for each salient stakeholder. The analysis has resulted in the identification of two dichotomous lenses to examine this success phenomenon, namely the success enabler and the positive outcome for each stakeholder. Commonalities and differences in success criteria and their meanings are analysed and discussed. Avenues for future research are also highlighted in order to advance the debate from a multi-stakeholder perspective.

## **STATEMENT OF ORIGINAL AUTHORSHIP**

I declare that the work contained in this thesis has not been previously submitted to meet requirements for any award or to any other higher education institution except as specified.

To the best of my knowledge and belief, the thesis contains no material previously published or written by another person except where the reference is made.

Signature:

Date:

*To Alice, Iarla and Annalise*

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## **ABBREVIATIONS**

**HCN** – host country nationals

**IA** – International assignment

**ROI** – Return on Investment

**MNC** – Multinational Corporation

**TS** – Trailing Spouse

**GTM** – Global Talent Management

**GM** – Global Mobility

**AE** – Assigned expatriate

**LTAE** – Long-Term Assigned expatriate

**SIE** – Self-initiated expatriate

**COLA** – Cost of living allowance

**I ROI** – Individual return on investment

**C ROI** – Corporate return on investment

**E ROI** – Expatriate return on investment

**CCT** – Cross-cultural Training

**POS** – Perceived organisational support

**CQ** – Cultural intelligence

**EPA** – Expatriate Performance Appraisal

**EPM** – Expatriate Performance Management

**TSIS** – Theory of Stakeholder Identification and Saliency

**SLR** – Systematic Literature Review

**CAQDAS** – Computer-Assisted Qualitative Data Analysis Software

## **CHAPTER 1: INTRODUCTION**

### **1.1 INTRODUCTION**

This thesis explores the complex phenomenon of international assignment success, an under researched area, still in its infancy. Many interlaced factors and salient stakeholders impinge on success and this has largely been unexplored until now. It aims to demystify the area of assignment success and bring us closer to a more holistic view of this phenomenon from a multi-stakeholder perspective.

### **1.2 RESEARCH GAP**

A vast amount of academic literature exists in the area of expatriation; however, the area of success, return on investment (ROI) and value measurement is neither widely researched nor understood (see McNulty, De Cieri and Hutchings 2009; Welch, Steen and Tahvanainen 2009 for recent exceptions). Many factors impact the success of an international assignment, and a variety of stakeholders are involved in the process at different stages of the global assignment cycle, each with differing agendas. A multi-stakeholder view is espoused in the literature (Doherty and Dickmann 2012; Takeuchi 2010). However, to date the stakeholder approach has neither been fully incorporated nor empirically investigated in the expatriate literature. Assignment success is difficult to define, and is regarded as a multi-faceted construct (Hemmasi, Downes and Varner 2010). The cost of expatriation is quite high; Deloitte (2010) estimates that an expatriate can cost 2 to 4 times the cost of a host employee salary. The number and profile of expatriates is growing (Brookfield 2016; Cartus 2013); given the substantial costs, it is imperative that what drives assignment success is examined. There is no universal definition for success, as different elements impinge on it from both a corporate

and an individual perspective. Exacerbating the problem is the fact that it is not well understood in organisations (Doherty and Dickmann 2012; McNulty *et al.* 2009; Welch *et al.* 2009). As there is “a requirement to better understand how expatriate assignments can add value in different contexts” (Collings, Scullion and Morley 2007, p. 202), it is timely to examine success and further integrate stakeholder perspectives into the growing expatriation debate. My research aims to close these empirical gaps.

### **1.3 PERSONAL MOTIVES OF THE RESEARCH**

Based on personal experience in HR in total rewards, talent mobility and organisational development, HR framework measurement and return on talent measurement was an area that was largely ignored. Looking at the return that the organisation garners from talent mobility and indeed the assignee themselves was more often than not an overlooked area. Thus, from both a HR perspective and an assignee perspective, my personal motives are rooted. Having spent time on short-term international assignments in my early career, which proved valuable from a career progression and personal development perspective, I feel from an academic perspective more needs to be learned about the value that such staffing options realise for both the individual assignee and the organisation.

### **1.4 AIM OF THE STUDY**

The aim of the thesis is to explicate success from the perspective of five proximal salient stakeholders in the international assignment cycle, to discover what success means to them and to find out where the commonalities and differences lie. It also aims to position the

research from a temporal perspective highlighting the enablers and outcomes of international assignment success at the pre-, in-, and post-stages of an international assignment.

For the purposes of this research, the following are considered proximal salient stakeholders:

- Long-term expatriates
- Repatriated assignees
- The Global Mobility function
- The Human Resource function
- Host country line managers of expatriates

## 1.5 RESEARCH QUESTIONS

The key research questions that are addressed are as follows:

Q1. Drawing on the stakeholder salience model (Mitchell, Agle and Wood 1997), who are the proximal salient organisational stakeholders in the international assignment cycle?

Q2. (a) What does success mean for proximal salient organisational stakeholders in the international assignment cycle? What are the success criteria for proximal salient organisational stakeholders?

(b) Do success criteria differ for different stakeholders?

Q3. What are the convergent and divergent success criteria for each salient stakeholder?

Addressing these aims and research questions serves to enlighten scholars on the identification of proximal salient stakeholders and their perceptions of success, which heretofore, have remained silent in extant literature. Identifying these perceptions will allow scholars to unearth similarities and differences in what success means to these stakeholders. Such discoveries would be beneficial in enhancing existing global mobility policies and practices in organisations that utilise international assignments as a global staffing option to ensure such assignments are successful and beneficial to all stakeholders involved, thus promoting individual and organisational alignment regarding assignment objectives.

## **1.6 RESEARCH METHOD**

This research employs an interpretivist paradigm to answer the research question. The research is underpinned by a qualitative research methodology. Semi structured interviews were conducted with the above five stakeholder cohorts, resulting in 25 stakes, to identify and highlight the commonalities and differences across the stakeholder groups. A detailed thematic analysis of semi-structured interviews teases out the main success criteria for each salient stakeholder.

## **1.7 SIGNIFICANCE AND CONTRIBUTIONS**

The contribution lies twofold from both a theoretical and an empirical perspective. Theoretically, it illustrates the importance of the stakeholder lens and empirically the perspectives of stakeholders such as global mobility and host country line managers, heretofore for which the literature has remained rather silent, are given voice. The analysis has resulted in the identification of two dichotomous lenses to examine this success phenomenon, namely the success enabler and the positive outcome for each stakeholder. This

research is further explicated in the context of the temporal dimension of international assignment success, highlighting the success criteria from a pre-, in- and post assignment framework. Commonalities and differences in success criteria and their meanings will be discussed. Avenues for future research are also highlighted in this thesis to advance the debate.

## 1.8 STRUCTURE OF THE THESIS

The thesis is structured as follows:

Following this introductory chapter, I focus on the literature review chapter.

**Chapter Two** – A Systematic Literature Review provides a robust account of international assignment success literature and how it relates to the five stakeholders under consideration and why stakeholder salience theory (Mitchell *et al.* 1997) is an appropriate theoretical lens for examining the research phenomenon.

**Chapter Three** – Details the rationale for pursuing an interpretivist/social constructionist perspective, and the rationale for using semi-structured interviews to gather information on stakeholder perspectives and views on assignment success. Outlines the approach taken on data analysis to arrive at the key success outcomes and enablers.

**Chapter Four** – Outlines the key findings by stakeholder. Outlines and discusses the key success criteria and enablers of such success. Presents the success criteria from a temporal perspective at the pre-, in-, and post assignment phases.

**Chapter Five** – Discusses the outcomes and enablers of assignment success at an individual and organisational level and how they relate to the five stakeholders. A theoretical model is

put forward to bring these perspectives on assignment success together from a temporal perspective.

**Chapter Six** – Concludes the thesis with a summary of contributions, key learnings and reflections, limitations, and future research directions.

**Bibliography** – References contained in the research project are listed.

Appendices are furnished at the end to supplement textual arguments where applicable.

The author now moves forward to discuss the literature review pertinent to the research question.

## CHAPTER 2: LITERATURE BACKGROUND

### 2.1 INTRODUCTION

There has been a great deal of research on various aspects of the international assignment cycle in recent years, however, there is a limited amount of work in the area of international assignment success. Indeed, understanding of the potentially differentiated nature of what particular stakeholders to the expatriation process consider to be success is even more limited. In order to address this knowledge gap, this research responds to the calls in the literature for the adoption of a multi-stakeholder perspective in order to strengthen existing lines of enquiry and open up new ones (Brewster, Bonache, Cerdin and Suutari 2014; Doherty and Dickmann 2012; Lazarova, Westman and Shaffer 2010; Takeuchi 2010). While an increasing interest in the role of stakeholders (both internal and external) in HRM systems and practices is evident (Beer, Boselie and Brewster 2015; Colakoglu, Lepak and Hong 2006; Guerci and Shani 2013), the stakeholder debate and its consequences for scholars' knowledge base in expatriation is at a relatively embryonic stage. Arguably, therefore global mobility scholars are at an important juncture in terms of furthering knowledge on salient stakeholder concerns around the outcomes of expatriation and on theoretical approaches and research processes, which are best placed to capture and give legitimate expression to variations in such stakeholders' views of what constitutes success.

Whilst a multi-stakeholder approach is espoused in the literature, to date relatively little global mobility research has been reported to advance this debate (Al Ariss 2014; Malek, Budhwar and Reiche 2015 and Miao, Adler and Xu 2011 are notable exceptions). Takeuchi (2010, p. 1059), looking specifically at expatriate adjustment research, rightly criticises the predominant 'expatriate centric' approach visible in much research to date and believes "it may be time to

start examining more than one stakeholder at a time to see if each stakeholder has an independent as well as an interactive impact on expatriate employees”. A multi-stakeholder approach of this nature should also assist in making further policy improvements to ensure value is derived for all stakeholders involved in the global mobility process. A range of stakeholders are involved at various stages of the international assignment cycle so it makes sense to seek to capture their views of success. A stakeholder can be defined as “any group or individual who can affect or is affected by the achievement of the organisation’s objectives” (Freeman 1984, p. 46). Stakeholder theory (Donaldson and Preston 1995; Freeman 1984) advocates considering the interests of all stakeholders, not just the shareholders. A central premise of the scholarship on stakeholder theory is the importance of acknowledging and paying attention to a wide group of legitimate stakeholders in order to enhance value creation and contribute to superior performance (Choi and Wang 2009; Harrison and Wicks 2013).

Defining international assignment success from the perspective of multiple stakeholders allows both scholars and practitioners to more clearly understand and support international assignments. The remainder of the chapter is structured as follows. Firstly, I identify the proximal salient organisational stakeholders in the international assignment cycle and establish the criticality of success to the assignment cycle. I then outline the methodology for conducting the systematic literature review. I highlight the multiplicity of ways in which international assignment success is treated in the literature. This is followed by a discussion of five salient stakeholders in the international assignment cycle, namely the expatriate, the repatriate, the global mobility function, the HR function and the host country line manager. Next, I illustrate how each of the areas from the literature review impacts on the various stakeholders. To advance scholarly understanding of the phenomenon of international assignment success from

a multi-stakeholder perspective and open up new lines of enquiry, a stakeholder classification is proposed to illustrate how success is viewed by salient stakeholders.

## **2.2 INTERNATIONALISATION AND A GLOBAL TALENT MANAGEMENT**

Global mobility is a topic that has seen an increased interest in recent years and has been catapulted into the limelight. Koslowski (2011, preface) defines global mobility as “movements of people across international borders for any length of time for work-related purposes”. As organisations now compete on a global scale and coupled with the need to expand internationally and the need to target emerging markets for growth opportunities, global mobility has come to the fore of the talent management agenda. Hence, the landscape of global mobility and talent management is changing as a result of the rapid rate of globalisation (Cascio and Aguinis 2008; Collings, McDonnell and McCarter 2015; Harvey, Napier and Moeller 2011). Some of the reasons proposed by Briscoe, Schuler and Tarique 2012, pp. 12-14 for driving this internationalisation of business are increased trade between countries and regions, the search for new markets, new product development and pressure to reduce costs, rapid and extensive global communications, rapid development and transfer of new technology, increased international travel, improving global education and a global talent pool, knowledge sharing among international firms, the growth of e-commerce and the homogenization of culture and consumer demands. Both internationalisation and globalisation have resulted in an increase in employees undertaking international assignment work, however, this has resulted in many challenges in the management of same. This has forced organisations to examine their global staffing strategy and talent pipeline to adequately match supply and demand for talent to effectively deliver on business objectives. Scullion and Collings (2006, p. 3) define global staffing as “the critical issues faced by MNCs with regard to the employment of home, host and third country nationals to fill key positions in their headquarter and subsidiary operations”.

### **2.2.1 Integration of global mobility with global talent management**

There have been numerous calls in the literature urging the coupling of global mobility with global talent management (Caligiuri and Bonache 2016; Cerdin and Brewster 2014; Collings 2014; McNulty and De Cieri 2016). The landscape of global mobility and talent management is changing as a result of globalisation (Collings, McDonnell, and McCarter 2015; Tung 2016). There are numerous tensions in the literature including a call for a more strategic positioning of international talent and global talent management (GTM) strategies (Collings 2014; Scullion, Vaiman, and Collings 2016) and a stronger focus on linking assignment returns to GTM outcomes (McNulty and De Cieri 2016). There has been a growth in the utilisation of international assignments as a talent management strategy (Brookfield 2016; Cartus 2013; Collings *et al.* 2007), as well as a proliferation in the profile of assignees and assignment categories (Baruch, Dickmann, Altman, and Bournois 2013).

## **2.3 THEORETICAL LENSES**

Numerous theoretical lenses were considered through which to examine the concept of assignment success, for example a transaction cost approach (Williamson 1985), and an intellectual capital approach (Welch, Steen and Tahvanainen 2009).

### **2.3.1 Transaction Cost Theory**

In previous scholarly work examining international assignment success and expatriate return on investment, McNulty and Tharenou (2004) applied Williamson's (1985) and Williamson and Masten's (1999) transaction cost theory approach, with its focus on transactions and the costs arising from such transactions. As McNulty and Tharenou (2004) believe that there are transaction costs during the long-term assignment that may reduce expatriate return on investment. Another perspective within this transaction cost theory is Tan and Mahoney's (2003) and Benito, Tomassen, Bonache-Perez and Pla-Barbers' (2003) argument that

contractual activities have the potential to influence costs and benefits to an organisation from both an ex ante (i.e. before executing the contract) and an ex post (i.e. during execution of the contract) perspective. Thus, each contractual activity has the potential to increase or decrease the costs and benefits to the organisation at different times over the duration of a contract (in this case the contract system is an international assignment). Therefore, “when transaction costs are viewed within the context of a system of activities occurring at different times during a long-term assignment, a more meaningful rate of return is likely to be obtained, because all relevant costs and benefits will be captured within the context of the appropriate activities taking place” (McNulty and Tharenou 2004, p. 76).

### **2.3.2 Intellectual Capital Theory**

Welch *et al.* (2009) contend that intellectual capital (with its components of human, structural and social capital) is a more relevant concept to apply in assessing the ROI of international assignments as it allows for a broader view, encouraging the inclusion of intangibles such as knowledge and networks, along with longer term costs and benefits post assignment. But as highlighted by the authors, an intellectual capital approach is fraught with “methodological challenges” due to its measurement complexity (Welch et al. 2009, p. 1340).

Other avenues would be the psychological contract due to its relational and transactional focus. Expatriates are affected at all stages of the international assignment cycle from a psychological contract perspective (Guzzo, Noonan and Elron 1994; Haslberger and Brewster 2009; McNulty *et al.* 2013). Any perceived breaches in a psychological contract could result in a negative perception of assignment success (Sherman and Morley 2015, 2018).

Additionally, the career capital perspective provides another useful lens for examining success from the perspective of knowing ‘how’, ‘why’ and ‘whom’ (Dickmann and Harris 2005; Inkson and Arthur 2001) According to Inkson and Arthur (2001), career capital includes “knowing-

why” capital (the individual’s motivation and values), “knowing-how” capital (skills, qualifications, expertise and experience), and “knowing-whom” capital (contacts and networks), as various successful outcomes could fall under such knowing domains for e.g. an increase in knowledge and skills garnered from undertaking an international assignment could result in enhanced development which could fall under the knowing how realm

Whilst all of the above have merit, in order to capture the success perceptions of the stakeholders, stakeholder theory, and specifically, stakeholder salience, provides the most apt prism through which to examine this.

### **2.3.3 An Alternative Lens - Stakeholder Theory**

While there is merit in the above theories for exploring international assignment success, I argue that none adequately consider the impact of proximal organisational stakeholders in the international assignment process that subsequently impacts on successful outcomes. Stakeholders are individuals or groups, inside or outside the organisation, that have a stake in or can influence corporate performance (Donaldson and Preston 1995). Clarkson (1995) classifies employees, customers, suppliers, owners, government and the communities in which organisations operate as stakeholders. I contend that a stakeholder theory approach (e.g. Freeman 1984; Clarkson 1995; Donaldson and Preston 1995; Freeman, Harrison, Wicks, Parmar and De Colle 2010; and Miao, Adler and Xu 2011) may provide a more appropriate theoretical lens through which to examine this complex phenomenon.

On the talent management side, Thunnissen, Boselie and Fruytier (2013) describe the talent management debate as one dimensional, managerialist and unitarist. To combat this they advocate the use of stakeholder theory for a more balanced pluralistic approach to talent management. Other scholars for example Lämsä, Heikkinen, Smith and Tornikoski (2017)

have examined the salience of family members for international assignees and assignment success.

## **2.4 WHO IS A STAKEHOLDER IN THE INTERNATIONAL ASSIGNMENT CYCLE?**

Mitchell *et al.*'s (1997) theory of stakeholder identification and salience (TSIS) provides a useful model through which to examine stakeholder involvement in facilitating successful international assignment outcomes. Mitchell *et al.* (1997, p. 853) argue that stakeholders are in possession of one or more of three attributes, namely (1) the stakeholder's *power* (Dahl 1957; Pfeffer 1981) to influence the organisation, (2) the *legitimacy* (Suchman 1995) of the stakeholder's relationship with the organisation, and (3) the *urgency* of the stakeholder's claim on the organisation. Stakeholder salience, defined as "the degree to which managers give priority to competing stakeholder claims" (Mitchell *et al.* 1997, p. 854), is argued to be positively related to the above perceived stakeholder attributes. Urgency introduces dynamism, criticality and temporality to the model, which is apt given that stakeholders do not operate in a static state (Agle, Mitchell and Sonnenfeld 1999). According to Laplume, Sonpar and Litz (2008), the three attributes have been supported empirically in the stakeholder literature (e.g. Agle *et al.* 1999; Parent and Deephouse 2007), although this represents the first instance (to my knowledge) where it has been applied to global mobility research and international assignment success in particular. Agle *et al.* (1999) tested the stakeholder salience model put forward by Mitchell *et al.* (1997) based on data provided by the CEOs of 80 large U.S. firms. Agle *et al.* 1999, p. 507 examined relationships among the stakeholder attributes of power, legitimacy, urgency, and salience; CEO values; and corporate performance. They found strong support for the attribute-salience relationship and some significant relationships among CEO

values, salience, and corporate social performance but found no support for a link between salience and financial performance.

I employ this lens on the basis that salience can explicate to whom and to what organisational management will perceive to be important and ultimately pay attention to (Mitchell *et al.* 1997). In employing it, I identify five distinct and proximal organisational stakeholders in the international assignment cycle. Driscoll and Starik (2004) argued that stakeholder salience is determined by a fourth attribute of proximity: “the near and the far, the short- and the long-term, and the actual and the potential” (p. 61). They argued that the more proximal stakeholders will be more salient to managers.

I contend that those stakeholders that possess all three attributes of power, legitimacy and urgency are: *the expatriate, the repatriate, the global mobility function, the HR function, and the host country line manager*. Due to their ‘stake’ and proximity in the international assignment cycle, each is deemed salient. The expatriate and repatriate are primary stakeholders in the cycle; without them an international assignment cannot take place. Repatriates as salient stakeholders can provide reflective accounts of their experiences both as expatriates (pre-, and in-, assignment) and repatriates (post-assignment). Hence, this is why they are important in explicating fully assignment success and why I have included both as proximal salient stakeholders. For the purposes of this research, I focus on corporate assigned expatriates (AEs) defined as “employees working for business organisations, who are sent overseas on a temporary basis to complete a time-based task or accomplish an organisational goal” (Shaffer, Kraimer, Chen and Bolino 2012, p. 1286), rather than self-initiated expatriates (McNulty, 2013; Suutari & Brewster, 2000). This definition by Shaffer et al. (2012) is one of the most widely used in the mobility literature (McNulty and Brewster 2017). Repatriates are

those who “complete the international assignment and move to a subsequent position, either at the individual’s home unit or another MNC unit” (Reiche 2012, p. 1052). Given the proliferation in the ‘expatriate’ concept, it is necessary to focus on the assigned traditional expatriate. There are numerous concepts as identified by McNulty and Inkson (2013) and McNulty and Brewster (2017) which can be the focus of mobility research (i.e. assigned expatriates, self-initiated expatriates, international business travellers and commuters, virtual workers, skilled and unskilled migrants). For the purposes of this research assigned expatriates have been targeted.

Type of Assignee	Definition	Where to find
PCNs: parent country nationals	Citizens of the headquarters country location of a company, from which they are then sent abroad	Home-country
TCNs: third country nationals, foreign local hires	Originate from neither the home country where corporate “headquarters” is located, nor the host country where they are employed, but a third country where they have lived either temporarily or permanently before agreeing to move to the host country	Host-country region
EHCOs: expatriates of host country origin / returnees	Permanent resident of the parent country but belongs to ethnicity of the host country and is hired and/or transferred by the parent country organisation to the host location on a temporary assignment or permanent transfer	Host-country
FELOs: foreign executives in local organisations	Foreign individuals at the executive level who hold local managerial positions supervising HCNs in local organisations where these organisations have their headquarters	Host-country
HCNs: host country nationals	HCNs are mostly non-expatriate employees residing in the host-location as citizens of that country	Host-country
Inpatriates: reverse expatriates	HCNs (local managers) and TCNs of a subsidiary sent to the parent country headquarters on an international assignment to provide them with an international perspective, exposure to corporate culture and a network of contacts	Host-country
Millennials	Individuals who are members of “Generation Y,” those born in 1982–2000	Home-country

Source: McNulty and Inkson 2013, p. 16.

### **Table 1: The Meanings of Expatriate.**

Such cohorts could be the focus of future research on assignment success and this is encouraged. From an organisational stakeholder perspective, the global mobility function and the HR function play a key role in supporting the expatriate and his/her adjustment and performance. If the mobility function can elevate itself beyond compliance towards a more strategic focus, this can only serve to enhance the function’s contribution to strategic business objectives (Dickmann 2015). The host country line manager plays a pivotal role in managing

the expatriate to ensure effective performance and development and a successful assignment. The following table illustrates how the salience is translated for each of these proximal organisational stakeholders as high levels of power, legitimacy and urgency attributes translate into highly salient stakeholders:

<b>Proximal Organisational Stakeholder</b>	<b>Power</b>	<b>Legitimacy</b>	<b>Urgency</b>	<b>Salience</b>
The Expatriate	Key focus of the assignment.	The assignment won't happen without them.	Their needs and demands are urgent to facilitate a smooth assignment.	High
The Repatriate	Key focus of the assignment.	The assignment won't happen without them.	Their needs and demands are urgent.	High
The Global Mobility Function	Facilitates the international assignment. Provides support to the expatriate and repatriate.	The function is a legitimate sub-function in HR.	Needs to provide timely support to the expatriate.	High
The HR function	Facilitates the international assignment move.	HR are a legitimate facilitator of international assignment moves.	Needs to provide timely support to the expatriate/repatriate to facilitate smooth transfer/re-integration.	High
The Line Manager (Host)	Facilitate the development of the expatriate. Provide opportunities for expatriate skills development and promotion.	Legitimate actor in the employment relationship.	Decisions hold an immediate effect in the host environment.	High

**Table 2: Proximal Organisational Stakeholders in the International Assignment Cycle.**

I recognise that there are other distal stakeholders for example the family, the home country line manager, senior management in the home and host organisation and these should be incorporated into future research on assignment success.

## 2.5 THE IMPORTANCE OF EXAMINING ASSIGNMENT SUCCESS

In addition to the centrality of the question of which expatriate stakeholders to include, the issue of the meaning and importance of the phenomenon of international assignment success is also critical. There are many indices and estimates highlighted in the literature to articulate the substantial costs involved in international assignments, with a typical estimation of three times the employee's domestic annual salary for each year on assignment (Doherty and Dickmann 2012; Steen and Welch 2011). Not surprisingly, recent practitioner reports from Cartus (2018) and Brookfield Global Relocation Services (2017) indicate that cost reduction is a priority. Additionally Brookfield (2017) indicate that 67% of respondents to the mobility trends survey highlight that in the last three years analytics and benchmarking data requests by their senior management teams regarding mobility has risen. These trends are occurring against a backdrop of projected talent shortages that organisations will face in the future as a result of demographic and aging workforce trends (McKinsey 2012).

Hitherto, there appears to be a fragmentation of international assignment success as different scholars focus on isolated areas that ultimately would bring to bear on successful international assignment outcomes (McNulty and Tharenou 2004). The intertwining of success, effectiveness, cost, value, performance, adjustment and return on investment (ROI) is nonetheless evident in the literature (e.g., Nowak and Linder 2016; Schmidt and Minssen 2007; Welch *et al.* 2009). Thus, the multifaceted and multidimensional nature of international assignment success needs to be acknowledged (Hemmasi *et al.* 2010; McNulty and De Cieri 2011). Notwithstanding the dearth of research on stakeholders in expatriation, the evident fragmentation in the body of work makes a systematic review of the literature necessary in order to identify the contours of the debate to-date, and to provide a route-map for future investigations in this domain area. From this literature review a stakeholder classification is

proposed, the purpose of which is to illustrate how success is viewed by each individual stakeholder in the international assignment cycle.

## **2.6 SYSTEMATIC REVIEW METHODOLOGY**

In approaching this systematic literature review (Tranfield, Denyer and Smart 2003) on international assignment success, four databases were consulted - Scopus, Google Scholar, Web of Science and EBSCO Business Source Complete. Each search was limited to peer reviewed journal articles and book chapters published in the English language. As this is a relatively nascent field of inquiry, time parameters were not specified when performing the searches. The initial keyword search involved combinations of the following terms: expatriate, international assignment, success, return on investment, performance, value, and effectiveness. With the lack of a universal definition of international assignment success, a variety of terminologies to denote 'success' were applied in the keyword search, e.g., 'performance' and 'effectiveness'. Searches were approached from both an individual and corporate 'success' perspective using the following search terms: 'international assignment success', 'expatriate success', 'expatriate failure', 'expatriate performance appraisal', 'expatriate performance management', 'expatriate performance', 'expatriate outcomes', 'expatriate assignment evaluation', 'expatriate effectiveness', 'expatriate return on investment', 'expatriate ROI', 'global mobility return on investment', 'global mobility ROI', 'individual return on investment', 'individual ROI', 'international assignment return on investment', 'international assignment ROI', 'return on investment in international assignments', 'ROI in international assignments', and 'value of international assignment(s)'.

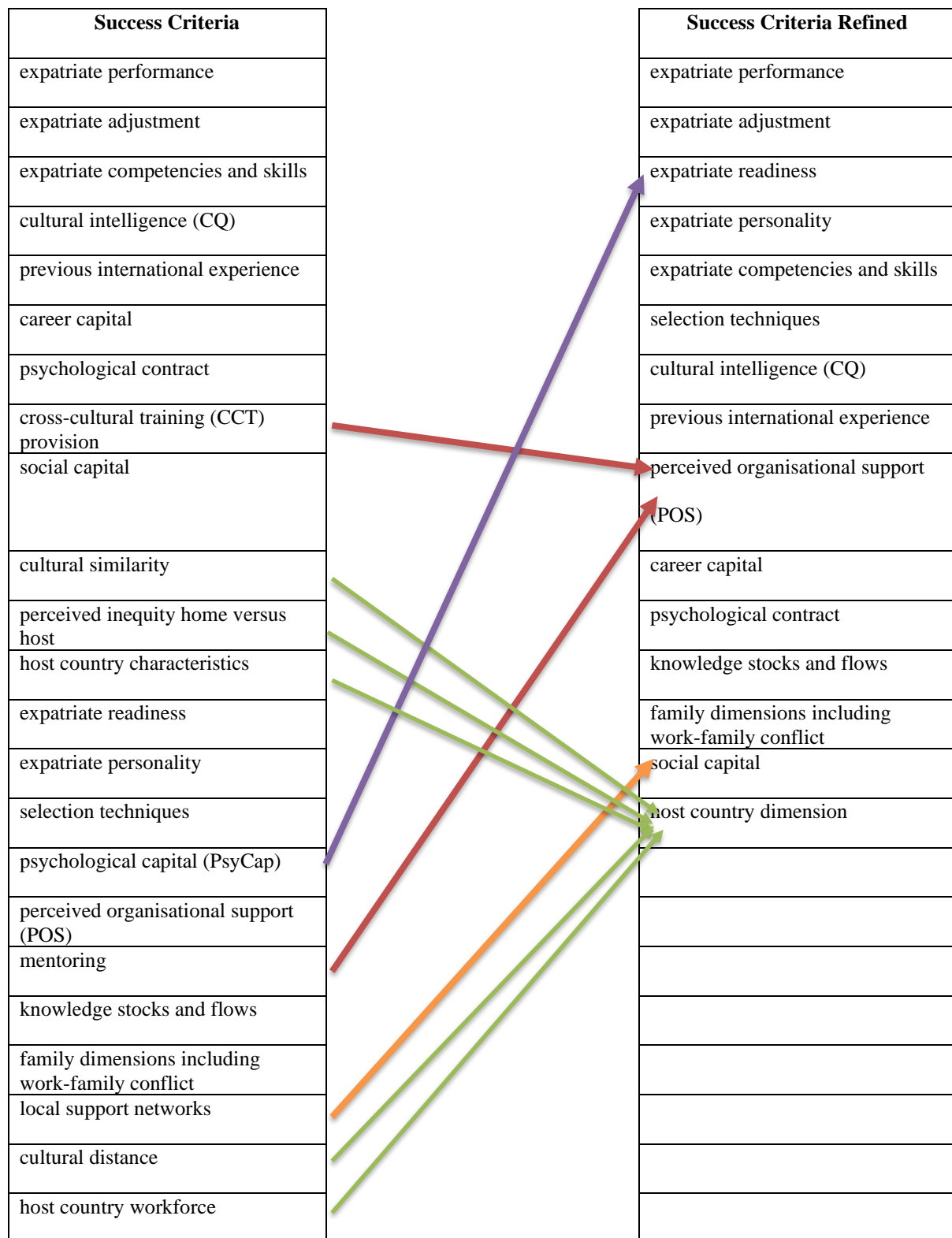
A total of 767 results were generated. I then reviewed the results and removed duplicate entries, unpublished content, non-peer reviewed publications and articles that were not directly relevant to the topic of international assignment success. These removals totalled 484 owing in large

part to the high number of duplicate results across the search terms and across the databases used. The remaining 283 journal articles and book chapters which are the focus of this systematic literature review were compiled in a single database. All articles were read and re-read and summaries of each uploaded in the database. Each article was mapped against a success criteria outcome from an international assignment success perspective and an impacted stakeholder(s) perspective. The success criteria went through a number of iterations until the final list of twenty-three (see table 3) was arrived at. This list was further grouped and refined to fifteen success criteria as highlighted in Table 4.

expatriate performance	expatriate readiness
expatriate adjustment	expatriate personality
expatriate competencies and skills	selection techniques
cultural intelligence (CQ)	psychological capital (PsyCap)
previous international experience	perceived organisational support (POS)
career capital	mentoring
psychological contract	knowledge stocks and flows
cross-cultural training (CCT) provision	family dimensions including work-family conflict
social capital	local support networks
cultural similarity	cultural distance
perceived inequity home versus host	host country workforce
host country characteristics	

**Table 3: International assignment success criteria.**

Table 4 highlights how the 23 success criteria were merged and reduced to 15.



**Table 4: International assignment success criteria refined.**

Examining the success criteria has resulted in the following mergers. Psychological Capital (PsyCap) has been merged with expatriate readiness as levels of PsyCap represented by hope and efficacy would represent how ready an expatriate would be to undertake an assignment. Cross cultural training provision and mentoring have been merged under perceived organisational support. Local support networks have been subsumed in the social capital criteria. A number of areas falling under the umbrella of a host country dimension have been merged together (i.e. cultural similarity, perceived inequity home versus host, host country characteristics, cultural distance, and host country workforce).

From these sequential steps, the total number of articles and book chapters included in the review was 283. The net was cast wide enough to capture the current state of international assignment success in the literature with our extensive search strings, hence the inclusion of 283 articles in the review, thus ensuring a comprehensive coverage of the field and enhancing the reliability of the process.

This detailed analysis of the literature lead to the identification of twenty-three success criteria, subsequently merged and consolidated into fifteen. Appendix A contains a sample of exemplar scholarly empirical studies explicating one or more of the success criteria unearthed by the systematic review. Subsequently the five chosen salient stakeholders were employed as a lens through which to filter the papers in the review in order to elucidate commonalities and differences among the stakeholders with respect to what they consider relevant success criteria. There were other additional stakeholders that were considered but not included such as home country line managers, executive and senior managers in organisations who are involved in global talent management decision making, other types of assignees such as short-term assignees, self-initiated expatriates, permanent transfers, family members (accompanying and

non-accompanying), and host country nationals. It is important and worthwhile to note that the approach here could be replicated for these additional international assignment stakeholders not addressed in this review. Identifying the different criteria that impact on international assignment success allows for a more holistic view of the concept.

## **2.7 HOW IS INTERNATIONAL ASSIGNMENT SUCCESS DEFINED?**

It is evident from the systematic literature review that there are a diversity of perceptions on what constitutes international assignment success in the literature. It has been conceptualised in different ways in the extant literature under the auspices of ‘performance’; ‘effectiveness’; ‘cost’; ‘ROI’, ‘success’ and ‘failure’. Various terms such as ‘success,’ ‘effectiveness,’ and ‘performance’ are used interchangeably (e.g., Liu and Shaffer 2005; Osman-Gani and Rockstuhl 2008), whilst other scholars have examined failure and failure rates (e.g., Feng and Pearson 1999; Forster 1997). On the latter, there is controversy about the suitability of using failure rates as a measure of success because it remains poorly defined and is considered an unreliable statistic due to uncertainty about the number of expatriates who actually fail during an assignment (Harzing 1995, 2002), with recent evidence suggesting that assignment failure rates may not be more than 5% annually (Brookfield Global Relocation Services 2015). Performance management should be central to any discussion on the success or failure of international assignments (DeNisi and Sonesh 2016; Harzing and Christensen 2004). A prominent research area in the ‘international assignment success’ domain is expatriate return on investment (McNulty and De Cieri 2011).

### **2.7.1 Expatriate return on investment (eROI) in the success debate**

One of the most cited definitions stems from the research of McNulty and Tharenou (2004) and McNulty and De Cieri (2011) focusing on costs and benefits from both a corporate and

individual ROI perspective in the context of an international assignment system. McNulty and De Cieri (2011, 2016) argue that the inclusion of individual ROI represents a significant step as it offers the prospect of establishing fuller linkages between research focused on global careers, global talent management, and career capital accumulation (Benson and Pattie 2008; Dickmann and Harris 2005) and the changing nature of the psychological contract (Yan, Zhu and Hall 2002) in the context of boundaryless careers. Ultimately, these factors may underpin the motives for an individual undertaking an international assignment.

### **2.7.2 Perspectives of eROI**

From a stakeholder perspective, Doherty and Dickmann (2012) make a critical step in progressing the debate on eROI by adopting an action research approach. Partnering with nine multinational companies, a set of metrics were developed based on the PwC Saratoga data to explore and measure the ROI of international assignments in the areas of performance, promotion, repatriation, and retention outcomes, as well as total remuneration and other financial costs related to the management of international assignees. Doherty and Dickmann (2012) advocate the inclusion of more factors and stakeholders to enhance the robustness of their metrics. However, McNulty (2015a) identifies a shortcoming in the metrics approach in that the reliability and validity of the metrics developed for the project could not be tested, and therefore, further research is required.

In contrast, McNulty and De Cieri (2013) argue that an evaluation framework centred on strategic planning and alignment (vertical fit) and the operationalisation of measures (horizontal fit) is required in advance of looking at metrics. They propose a framework that captures the vertical and horizontal linkages. Such a framework they argue is an essential first step in advance of the setting down of core metrics. The framework ultimately concerns the

appropriateness and applicability of the metrics from both a strategic and operational perspective. To enhance the robustness of this model, a stakeholder perspective should be incorporated as different salient stakeholders would arguably hold different metrics as being the most appropriate and suitable, dependent on the timeframe under consideration. As research in this field develops, identification and understanding of salient success criteria will continue to evolve and new streams of research may further extend the frameworks over time.

A third perspective from the recent work of Nowak and Linder (2016) suggests that viewing the corporate ROI aspect of eROI from a process costing perspective allows scholars and practitioners to clarify total expatriation costs and breakeven points from international assignments during the pre-, in- and post-assignment stages. This perspective represents the first instance of a process model to evaluate the total costs of expatriation from a management accounting perspective, allowing scholars and practitioners to identify the most important cost drivers in order to inform global mobility decision making and practice.

Each of the five salient stakeholders will be discussed sequentially, drawing on the success criteria from the systematic review.

## **2.8 SUCCESS CRITERIA FOR THE LONG-TERM ASSIGNED EXPATRIATE (LTAE)**

Some twelve of the fifteen areas identified in the systematic literature review represent success criteria for the expatriate, namely expatriate performance, readiness, adjustment, personality, competencies and skills, cultural intelligence (CQ), previous international experience, perceived organisational support (POS), career capital, psychological contract, knowledge stocks and flows and social capital are identified. Seven of these are unique to the expatriate as

a stakeholder, while the other five also emerge as criteria for other stakeholders to the process. A discussion of the most pertinent issues follows.

### **2.8.1 Expatriate Performance, Performance Management and Performance Appraisal**

A key focus emanating from this review is the complex and multifaceted area of expatriate performance. The ultimate success of the expatriate is represented and demonstrated by their effective performance. Varying definitions and viewpoints exist as to what exactly is intended by expatriate performance (Care and Donohue 2017; Thomas and Lazarova 2006). From the expatriate perspective, the literature indicates a myriad of factors as potentially impacting on the success of expatriate performance management and appraisal systems such as: (i) context, goal setting (hard/soft measures), and number of raters and location (home/host/third country) (Fee, McGrath-Champ and Yang 2011); (ii) frequency of appraisal, rater bias, and the use/non-use of a standardised/customised performance appraisal form to take account of international contextual factors (Gregersen, Hite and Black 1996; Shih, Chiang and Kim 2005); (iii) the use of 360 degree feedback systems (Mujtaba, Fisher, Friis, Johnson, Kirkwood and Flores 2009); (iv) clarifying performance expectations prior to the performance rating, and the fairness and transparency of the performance appraisal system (Erbacher, D'Netto and España 2006); (v) the incorporation of career development objectives (Martin and Bartol 2003); (vi) the position of the expatriate in the organisational hierarchy, and his or her task type (Suutari and Tahvanainen 2002); (vii) the type of expatriate and assignment (Tahvanainen 2000); (viii) crossover and spillover effects from non-work roles such as family (Care and Donohue 2017) and, (ix) the dual allegiance and commitment foci of the expatriate between subsidiary and headquarters (Black and Gregersen 1992).

There have been some recent attempts to develop expatriate performance models (Lee and Donohue 2012; Varma, Pichler and Toh 2011). For example, Varma *et al.* (2011), adopting a performance theory perspective, argue that both individual and organisational factors affect international assignment success by impacting on assignment self-efficacy and motivation. They introduce the concept of “expatriate readiness” to the success debate which comprises both the expatriate’s motivation to accept and perform the assignment (assignment motivation) and the expatriate’s belief in his/her capability to perform and complete the assignment successfully (assignment self-efficacy). Interestingly, Andresen and Margenfeld (2015) examining international relocation mobility readiness discovered that a boundaryless mindset, previous international work experience and the perceived social endorsement of international relocation mobility were positively related to such readiness.

### **2.8.2 Expatriate Adjustment**

Adjustment is a multidimensional concept of which a number of multi-level models exist (Black, Mendenhall and Oddou 1991; Hippler, Caligiuri, Johnson and Baytalskaya 2014; Searle and Ward 1990). There has been a tendency in the literature towards a general acceptance and application of the Black *et al.* (1991) model of general, interaction and work adjustment (see also Black 1988; Black and Gregersen 1991; Black and Stephens 1989), at the expense of psychological and sociocultural adjustment (Searle and Ward 1990; Ward and Kennedy 1999). While Black *et al.*’s (1991) model has been supported (e.g., Shaffer, Harrison and Gilley 1999), recent research by Hippler, Caligiuri, Johnson and Baytalskaya (2014) extends and revises our understanding of expatriate adjustment. Their scale, composed of 35 items, considers multiple facets of the environment for expatriates in tandem with the importance of each facet for each expatriate.

While some scholars have discovered a positive relationship between work adjustment and work performance (Bhaskar-Shrinivas, Harrison, Shaffer and Luk 2005; Kraimer, Wayne and Jaworski 2001), Thomas and Lazarova (2006, p. 260) however note that “the *precise* relationship between adjustment and the performance of expatriates remains unresolved”. A number of questions still remain regarding causality, the nature of the relationship, and sequentiality, i.e., does adjustment precede performance or vice versa? Or could both occur concurrently (Shay and Baack 2006). More research is required in terms of understanding the antecedent-adjustment link. Haslberger, Brewster and Hippler (2013), in their own work, call for a refinement of the conceptualisation and a fuller understanding of the content domain and antecedent factors of expatriate adjustment in order for scholars to gain a better understanding of the factors and domains that impact on adjustment, and consequently how adjustment affects performance. Their proposed model draws on multidimensional areas of impact, describing adjustment as a person-environment relationship within the three dimensions of cognitions, feelings, and behaviors. In further work, Hippler, Caligiuri and Johnson (2014) argue that it is not sufficient to assume that all expatriates adjust in a similar manner as each will respond temporally in a differential manner to stimuli and crises in their respective environments. Indeed, our understanding of the role of temporal dynamics in expatriate adjustment is “barely out of the starting blocks” (Hippler, Brewster and Haslberger 2015, p. 1931). Hence, the temporal element of international assignment success warrants attention as success may have different meanings, depending on the point in time at which it is considered and examined.

### **2.8.3 Cultural Intelligence of the Expatriate**

A key ingredient in the cross-cultural adjustment mix is the facilitating role of expatriate cultural intelligence (CQ) (Lee, Veasna and Wu 2013; Malek and Budhwar 2013; Sambasivan, Sadoughi and Esmailzadeh 2017). Ang and Van Dyne (2008) conceptualise CQ as a four-

factor construct that includes metacognitive, cognitive, motivational, and behavioural dimensions. CQ encapsulates the ability to adapt across cultures and function effectively when immersed in multicultural situations. Studies that have investigated the relationship between CQ and job performance (e.g., Jyoti and Kour 2015; Lee and Sukoco 2010; Sri Ramalu, Che Rose, Uli and Kumar 2012; Zhao, Liu and Zhou 2016) have all found a significant positive relationship. Recent research has also indicated a positive relationship between CQ and cross-cultural adjustment (Lee and Kartika 2014; Sri Ramalu *et al.* 2012).

Another facet of CQ is biculturalism (Bell and Harrison 1996, p. 49; Tadmor and Tetlock 2006), defined as “the state in which individuals maintain their distinctive cultures, including values, attitudes, customs, beliefs, and habits while simultaneously interacting with and learning from those of other cultures”. The power of a second culture can aid adjustment and performance as it may facilitate expatriates’ adaptation from one culture to another with greater ease (Tadmor and Tetlock 2006). The reverse may also occur where exposure to multiple cultures can inhibit cultural adaptation (Hanek, Lee and Brannen 2014). Hanek *et al.* (2014, p. 85) argue that individuals who identify with multiple cultures can have lower awareness of cultural differences, which can decrease cultural adaptation as a result of “overconfidence in one’s cultural skills which in turn leads to lowered motivation to attend and adapt to cultural differences”. Clearly more empirical studies are necessary to understand the role of the CQ sub-dimensions including bi- and multi-culturalism.

#### **2.8.4 Expatriate Careers**

The prominence of boundaryless and protean careers and the predisposition of certain individuals towards an internationalism career anchor (Lazarova, Cerdin and Liao 2014) contribute to the debate about what constitutes an effective international assignment. One benefit of international assignments emanating from the assignment literature is career capital

accumulation (Dickmann and Harris 2005). According to Inkson and Arthur (2001), career capital includes “knowing-why” capital (the individual’s motivation and values and the way in which these energize work behaviour), “knowing-how” capital (skills, qualifications, expertise and experience), and “knowing-whom” capital (contacts, networks and reputation). Career capital can act as a key driver for undertaking an assignment. However, studies present mixed findings. On the one hand, undertaking an international assignment may not always result in a positive career outcome to the individual with their current employer, as the link between international assignments and career progression with an existing employer remains unclear (Benson and Pattie 2008; McNulty and De Cieri 2016). Bolino (2007, p. 825) argues that the longer expatriates remain on assignment, the more likely it is that they may experience an “out of sight, out of mind problem”, which could adversely affect their careers. Additionally, upon repatriation, expatriates may experience a career disequilibrium or ‘wobble’ as they struggle to leverage the competencies and skills acquired whilst on assignment (Doherty and Dickmann 2009). On the other hand, career capital arising from international assignment experience has been found to enhance expatriates’ external marketability to potential *new* employers in the context of their enhanced employability on the international labour market, while negatively impacting on returns to their current employer due to unplanned expatriate turnover (McNulty, De Cieri and Hutchings 2013).

The moderating role of career mentoring is also important (Mezias and Scandura 2005). Carraher, Sullivan and Crocitto (2008) discovered that having a host-country mentor had a significant positive effect on the expatriate’s organisational knowledge, knowledge-sharing, job performance, promotability, and perceptions of teamwork, whilst a home-country mentor had a significant positive effect only on organisational knowledge, job performance, and promotability. Career mentoring at different stages of the international assignment cycle (pre,

in- and post-assignment) may thus improve adjustment, development, and retention (Holtbrügge and Ambrosius 2015; Mezias and Scandura 2005), and thereby international assignment success.

### **2.8.5 Changing Nature of the Psychological Contract**

Haslberger and Brewster (2009) contend that the psychological contract is prominent at all stages of the international assignment cycle. Rousseau (2004, p. 120) defines psychological contracts as “beliefs, based upon promises expressed or implied, regarding an exchange agreement between an individual and, in organisations, the employing firm and its agents”. Psychological contracts are particularly important to expatriates given the ever-changing environments in which they live and work and their subsequent implicit and often unspoken reliance on organisations for work and non-work support (Guzzo *et al.* 1994; Haslberger and Brewster 2009; McNulty *et al.* 2013). Psychological contract breach and violation has thus been found to have a negative impact on organisations in a number of ways (McNulty and De Cieri 2016). For example, the nature of the psychological contract changing from relational to transactional means that some expatriates are increasingly pursuing self-directed careers outside of the confines of company control because the feeling that the company cares about them (and their families) is diminished (McNulty 2014). Recent research on psychological contract formation by Sherman and Morley (2015, 2018) further highlights the influence of dealing with met and unmet expectations and crises during an assignment which can lead to perceptions of breach and violation at different temporal points such as selection for the international assignment, the provision of pre-departure training and organisational support in the host environment. Indeed, McNulty and Inkson (2013, p. 104) argue that the psychological contract is the “biggest differentiator for organisations wanting to obtain a satisfactory eROI”. Recent scholarly work by Perera, Chew and Nielsen (2017) introduce a dual-foci perspective

on psychological contract breach for the assigning parent company and the host company. Misalignment in these two domains can increase the chance of a psychological contract breach, which can have a negative impact on the outcomes of international assignment success.

### **2.8.6 Knowledge Stocks and Flows**

One of the key objectives of expatriation is knowledge transfer, which can be of an explicit or tacit nature (Minbaeva and Michailova 2004). International assignees can be viewed as transfer facilitators or boundary spanners (Johnson and Duxbury 2010). Extant literature has examined knowledge transfer in terms of absorptive capacity (Cohen and Levinthal 1990), disseminative capacity (Minbaeva and Michailova 2004), its uni- and bi-directional nature including knowledge transfer back to the home organisation during repatriation (Tsang 1999), knowledge transfer from subsidiaries to headquarters associated with inpatriation (Reiche 2011), and reverse knowledge transfer associated with repatriation (Reiche 2012). The inability to leverage expatriates' and repatriates' knowledge translates into a loss of competitive advantage (Newton, Hutchings and Kabanoff 2007), which is often compounded when organisations do not recognise that expatriates are critical agents in the knowledge transfer process (Tsang 1999). The loss of competitive advantage, in turn, is likely to negatively impact as the knowledge transfer gains to be expected from expatriation, and during repatriation, will be diminished.

### **2.8.7 Personality of the Expatriate**

The role of personality as a determinant of adjustment and performance has been explored in the literature (Dalton and Wilson 2000; Hechanova, Beehr, and Christiansen, 2003; Holopainen and Björkman, 2005; Kramer and Sommer 2013; Newman, Bhatt and Gutteridge 1978). One of the most cited studies on personality in expatriation is Caligiuri's (2000) 'Big Five' personality characteristics (Extroversion, Agreeableness, Conscientiousness, Emotional

Stability, and Openness or Intellect). Studies that have examined the relationship between personality and expatriate job performance, e.g., Ones and Viswesvaran (1999), Dalton and Wilson (2000), Caligiuri (2000), Mol, Born, Willemsen and van der Molen (2005), Shaffer, Harrison, Gregersen, Black, and Ferzandi (2006), and Du Toit and Jackson (2014) report mixed findings on the relationship between dimensions of the Big Five personality and job performance. On the one hand Ones and Viswesvaran (1999) and Caligiuri (2000) found that Conscientiousness was deemed the most important dimension, on the other Shaffer *et al.* (2006) surprisingly found Conscientiousness unimportant.

The importance of personality traits in predicting positive assignment outcomes is closely associated with selection techniques employed by the organisation (Lund and Degen 2010; McCabe, 1993), as suitable selection techniques should assist in the selection of the most appropriate candidate for the international assignment, which in turn should increase the expatriate's likelihood to perform well. However, candidate personality assessment tests are only employed in a minority of organisations with only 22% of respondents in the 2016 Brookfield Global Relocation Services' Survey reporting utilization of same. Such an approach resonates with the 'coffee-machine' system of selection, which refers to the situation where closed informal systems are used to select an international assignee in an ad hoc and reactive manner with the selection discussion and decision taking place among senior and/or line managers at the 'coffee machine' (Harris and Brewster 1999), that has plagued many companies, and to some extent still does, in relation to international assignment selection.

### **2.8.8 The Effect of Previous International Experience**

The findings of extant research have not always been consistent in determining whether prior international experience impacts positively on expatriate adjustment (Black and Gregersen 1991; Holopainen and Björkman 2005; Shi and Franklin 2014). While some studies show a positive influence of previous international experience on adjustment (Bhatti, Battour, and

Ismail 2013; Shaffer *et al.* 1999), others suggest that previous international experience has a significant positive effect only in the early stages of the adjustment process, but that it deteriorates later in the assignment (Takeuchi, Yun, and Tesluk 2002). Takeuchi, Tesluk, Yun and Lepak (2005) found a positive, albeit weak association between previous international experience and cross-cultural adjustment, with the study highlighting prior international experience as a moderator rather than as an antecedent to cross-cultural adjustment.

## **2.9 SUCCESS CRITERIA FOR THE REPATRIATE**

Similar to the expatriate, some twelve of the fifteen areas identified in the systematic literature review represent success criteria for the repatriate, namely repatriate performance, readiness, adjustment, personality, competencies and skills, cultural intelligence (CQ), previous international experience, perceived organisational support (POS), career capital, psychological contract, knowledge stocks and flows and social capital are identified.

Latent issues that spring out from the literature are career support for repatriates, a lack of repatriate support and the disuse of accumulated career capital upon return.

### **2.9.1 Repatriation Support**

Repatriation support appears parsimonious in research studies (Cho, Hutchings and Marchant 2013). Brookfield (2016) found that 83% of organisations do not have a formal repatriation strategy linked to career management and retention. Such practices would not support a successful repatriation. O'Sullivan 2002, p. 597 defines a successful repatriation as “one in which, upon return, the repatriate: gains access to a job which recognises any newly acquired international competencies; experiences minimal cross-cultural re-adjustment difficulties; and reports low turnover intentions”. Worryingly, repatriates often return home to roles which

allow for limited utilisation of the newly acquired skills from expatriation (Black, Gregersen and Mendenhall 1992; Gomez-Mejia and Balkin 1987).

### **2.9.2 Lack of use of repatriate knowledge**

The lack of use of the repatriates' accumulated tacit knowledge translates into a loss of competitive advantage as it is not harvested and utilized to its full potential (Oddou, Osland and Blakeney 2009). Most firms do not view repatriate knowledge as a valuable resource or competitive advantage at all (Barakat and Moussa 2012; Bender and Fish 2000).

## **2.10 SUCCESS CRITERIA FOR THE GLOBAL MOBILITY FUNCTION**

The global mobility function can play a central role in ensuring that international assignments are a success. Research nonetheless shows that organisations struggle with how to measure and successfully manage global mobility activities to achieve a satisfactory outcome (McNulty *et al.* 2009). This is not surprising as current understanding of what constitutes success is limited and “open to various interpretations” (McNulty and De Cieri 2011, p. 913).

Of late a strive for strategic orientation (Dickmann 2015; K2 Corporate Mobility 2018; Sparrow 2012) and increased focus on cost is evident (Brookfield 2015; Santa Fe Relocation 2019). Organisations are under pressure to contain mobility costs whilst simultaneously there is a need to develop and retain talent in the organisation via short-term assignments and business travel (Santa Fe Relocation 2019). Despite the argument for integrating global mobility with global talent management (Collings 2014; Dickmann 2015; McNulty and De Cieri 2016), research on practice would paint a different picture with global mobility functions continuing to sit in compensation and benefits (55%) versus 4% in the talent management space. Additionally, reporting on their role, the global mobility profession indicates 46% operational i.e. focused on service delivery; 44% advisory i.e. expert advisor on global mobility, whilst only 10% are strategic i.e. aligned to broader talent agenda (Brookfield 2016).

Applying the stakeholder lens, the following success criteria for the global mobility function are identified: expatriate performance, selection techniques, perceived organisational support (POS), career capital, and knowledge stocks and flows. Four of these, namely expatriate performance, perceived organisational support (POS), career capital, and knowledge stocks and flows are held in common with the expatriate. Selection techniques and cross-cultural training (CCT) provision are unique success criteria for this stakeholder. The most salient issues for the global mobility function as a stakeholder are now discussed.

### **2.10.1 Expatriate Performance Management Systems**

Evidence from the systematic literature review points to a paucity of empirical research on expatriate performance appraisal (EPA) and expatriate performance management (EPM) systems. A predominant form of EPM does not appear to exist in organisations (Gregersen *et al.* 1996). Among the limited extant literature, there are deficits with regard to the stakeholders involved (not all are included, e.g., Martin and Bartol 2003) and data access issues may be compounded by the “complexity of conducting research in an international setting and the difficulty of accessing relevant international samples” (Claus and Briscoe 2009, p. 182). Studies typically focus on only one stakeholder (e.g., the HR specialist who administers the PR system) often at the expense of the other stakeholders, i.e., the reviewer, the reviewee, host employees and so on. Holistically, the entire picture is missing in relation to all stakeholder perceptions regarding what is effective and not effective within the EPM process. Acquiring such information would allow us to better explain EPM from a multi-stakeholder perspective. From an organisational perspective, a number of factors will impact on the success of EPM and EPA systems including context, organisation size, structure and degree of internationalisation (Fee *et al.* 2011; Suutari and Tahvanainen 2002), and the multinational corporation’s (MNCs) country of origin (Shih *et al.* 2005). Also important is how organisations aggregate global performance management results to affect strategic activities as currently

there appears to be an overarching focus in extant literature on the evaluation of individual employees at the expense of firm level evaluation (Engle, Festing and Dowling 2014). Undoubtedly these factors closely interlink with success criteria identified in the expatriate domain, all of which can impact on expatriate adjustment, performance and success.

### **2.10.2 Types of Expatriate Support Provided by the Organisation**

The role that perceived organisational support (POS) plays, via the global mobility function, in facilitating expatriate adjustment, performance and in turn international assignment success has been highlighted in the literature (Bashir 2012; Salgado and Bastida 2017; van der Heijden, van Engen and Paauwe 2009; van der Laken, van Engen, van Veldhoven and Paauwe 2016). How the expatriate perceives the adequacy of support provided to them (and their families) is an important parameter (Lazarova, McNulty and Semeniuk 2015). Kraimer and Wayne (2004) suggest that three dimensions of organisational support are most relevant to international assignment success: (1) *general adjustment support* (i.e., helping expatriates and their families adapt), (2) *career support* (i.e., offering career guidance), and (3) *financial support* (i.e., providing allowances and assistance). They found that individual perceptions of adjustment, career, and financial support are directly and positively related to expatriates' adjustment and commitment. POS is relevant throughout all stages of the international assignment cycle (i.e., pre-, in-, and post-assignment). Kawai and Strange (2014) further emphasise the need to investigate the potential *sequential* process by which POS may contribute to expatriate performance. Their study uniquely examines the multidimensionality of POS and the distinct effects of each dimension on work adjustment, affective commitment and expatriate performance, whilst previous empirical work has relied on singular components of POS, with the authors finding that career POS has a direct positive influence on work adjustment and affective commitment.

### **2.10.3 Cross-cultural Training**

Cross-cultural training (CCT) provision via an external third party provider under the remit of the global mobility function is an important activity that aids in an expatriate's adjustment. Many scholars have indicated the importance, usefulness and applicability of CCT to cross-cultural adjustment and, in turn, international assignment success (Cerimagic 2011; Guy and Patton 1996). However, some studies have found mixed results with regard to the effectiveness of CCT (Morris and Robie 2001; Puck, Kittler and Wright 2008; Qin and Baruch 2010). Evidently, more research is needed on the role and effectiveness of CCT during the pre-, in-, and post-assignment stages of expatriation. In particular there is a need to identify the suite of CCT options currently available to expatriates, and to whom they are made available (expatriate employees as well as their family members), along with establishing which types of CCT have more impact in terms of assignment success.

### **2.10.4 Financial Support**

As the administration of expatriate total reward in general falls under the remit of the global mobility function, this is an important area impacting on the cost side of international assignment success (Nowak and Linder 2016). Recently, there have been changes in compensation approaches for expatriates, largely driven by the organisational cost-containment agenda and partly due to the increasing prevalence of a global career trajectory (McNulty 2015b). A move away from the traditional balance sheet approach towards local plus (host-country based compensation) (Sims and Schraeder 2005) and localisation is being observed. Local plus takes into account competitor salary benchmarks in the host destination, with traditional allowances reduced (e.g. housing, children's education, and COLA premiums) (Wentland 2003), whereas localisation moves an expatriate onto full host destination remuneration with no additional benefits or allowances (Tait, De Cieri and McNulty 2014). Such reductions may have an adverse impact on the motivation and loyalty of expatriates

(McNulty *et al.* 2013) so a well-planned and articulated communication exercise would be necessary to manage expectations to avoid withdrawal intentions.

### **2.10.5 Career Capital**

When an expatriate accumulates career capital, this capital can also translate into enhanced capability for the organisation in terms of social capital (*knowing whom*), intellectual capital (*knowing how*) and organisational commitment (*knowing why*) (Haslberger and Brewster 2009). However, extant literature appears silent on returns to the organisation from this accumulation. As individuals and organisations can differ in terms of the usefulness derived from the three types of career capital (Dickmann and Doherty 2010), research aimed at individual and organisational stakeholder outcomes is warranted. It is unfortunate that acquired knowledge and skills are not harvested in the interest of the organisation upon repatriation, something which is well documented in extant literature (Crowne 2009; Lazarova and Caligiuri 2001). Indeed, assignees in some cases return to an underemployed position in the home organisation (Bolino and Feldman 2000). From the firm's perspective, McNulty *et al.* (2013) found that when expatriates acquire a satisfactory level of career capital from an international assignment, their propensity to engage in job mobility preparedness activities (i.e., to look for a better role with a competitor) increases during an assignment, thus creating problems for the sending organisation in terms of talent loss and subsequent disruptions to succession and leadership pipelines and global talent management strategies.

### **2.10.6 Knowledge Stocks and Flows**

As already highlighted one of the key objectives of expatriation is knowledge transfer. Key to this is the role of HRM systems (e.g. rewards, performance management, and career development) in supporting knowledge flows (Minbaeva 2008). Multidirectionality of knowledge flows has been examined in the literature including knowledge transfer back to the

home organisation during repatriation (Antal 2000) and knowledge transfer from subsidiaries to headquarters associated with inpatriation (Reiche 2006, 2011). Reiche (2011) focuses on the role of inpatriates as boundary spanners discovering that such boundary spanning is positively related to inpatriates' individual efforts to transfer knowledge and inpatriates' perceptions of HQ staff efforts to acquire such knowledge. Taking the research agenda forward requires future research to examine modes of transfer and the facilitating role of HRM systems and other stakeholders (e.g., line managers, co-workers) in the multidirectionality of knowledge flows.

## **2.11 SUCCESS CRITERIA FOR THE HR FUNCTION**

The success criteria are similar to the global mobility function. Applying the stakeholder lens, the following success criteria for the HR function are identified: expatriate performance, selection techniques, perceived organisational support (POS), career capital, and knowledge stocks and flows. Four of these, namely expatriate performance, perceived organisational support (POS), career capital, and knowledge stocks and flows are common with the expatriate.

## **2.12 SUCCESS CRITERIA FOR THE HOST COUNTRY LINE MANAGER**

Some six of the fifteen areas identified in the systematic literature review represent success criteria for the host country line manager, namely expatriate performance, adjustment, competencies and skills, career capital, knowledge stocks and flows and social capital are identified.

Extant research has examined the role of the home and host line manager as a stakeholder and their influence on expatriate careers and development as the predominant focus. According

to Pattie, Benson, Casper and McMahan (2013) sending supervisors significantly influence the success of international assignments as home supervisors are more likely to be focused on employee development than host supervisors. Benson and Pattie (2009) comparing the influence of home-and host-line managers on expatriate outcomes found that home managers are more important than host managers for outcomes related to expatriate careers, whereas host line managers were more likely to influence outcomes of expatriate adjustment and withdrawal.

## 2.13 SUCCESS CRITERIA FOR ALL STAKEHOLDERS

Bringing all the success criteria together results in a stakeholder classification from the systematic literature review:

Systematic Literature Review derived success criteria	Stakeholder				
	Expatriate	Repatriate	Global Mobility Function	HR Function	Line Manager (Host)
	Individual Level		Organisational Level		
Expatriate Performance	●	●	●	●	●
Expatriate Readiness	●	●			
Adjustment	●	●			●
Expatriate Personality	●	●			
Selection Techniques			●	●	
Expatriate Competencies & Skills	●	●			●
Cultural Intelligence (CQ)	●	●			
Previous International Experience	●	●			
(Perceived) Organisational Support	●	●	●	●	
Career Capital	●	●	●	●	●
Psychological Contract	●	●			
Knowledge Stocks/Flows	●	●	●	●	●
Family Dimensions & Work-Family Conflict					
Social Capital	●	●			●
Host Dimension					

**Table 5: A Stakeholder Classification of International Assignment Success.**

From the systematic literature review, the similarities between the expatriate and repatriate stakeholder at the individual level are evident. From an organisational perspective, there are similarities amongst the HR and global mobility function, as in current extant literature, these two are treated as synonymous, however on the ground and practically in the fieldwork, it is anticipated that differences in success perceptions may surface. Finally, the host country line manager criteria appear to differ from HR and global mobility with focus on competencies and skills development and social capital. Performance, career capital and knowledge stocks and flows appear as salient criteria across all individual and organisational level stakeholders.

## **2.14 CONCLUSION**

This chapter has furnished a detailed and critical review of extant literature on the success priorities for the salient stakeholders in the international assignment cycle that are the foci of this doctoral research. The next chapter focuses on the research methods, data gathering field work and analysis phase to ask salient stakeholders what success means to them.

## **CHAPTER 3: RESEARCH METHODOLOGY**

### **3.1 INTRODUCTION**

This chapter outlines the methodological approach taken to answer the research questions under study. It details the steps taken to acquire stakeholder participants, targeted questions on assignment success, and approaches to analysing the collected data in order to arrive at a list of success criteria for each stakeholder cohort. Whilst there are limitations with the small sample size, this is an exploratory study whereby international assignment success is explicated through detailed narrative accounts of the salient proximal stakeholders at key temporal phases (i.e. pre-, in-, and post-assignment) of the international assignment cycle. As such it aims to demonstrate that there are both commonalities and variations in international assignment success views. Hence, such exploratory studies are beneficial and worthwhile. Investigating international assignment success lends itself to such exploratory studies involving more stakeholders, thus additional and larger analyses of this type are merited. Harzing (2016) has stressed the importance of replication studies in the field of expatriation, and in particular the area of assignment success and failure.

### **3.2 RESEARCH PHILOSOPHY**

In approaching this research it is important to understand the philosophical assumptions that underpin it as it will ultimately shape my approach to research, and my research questions and how I gather information to answer my research questions (Creswell 2013; Saunders, Lewis and Thornhill 2012). Research philosophy concerns the development of knowledge and the nature of that knowledge, and how you see the world. This study stems from an interpretivist or social-constructivist perspective.

### 3.3 INTERPRETIVISM/CONSTRUCTIVISM

The interpretivist approach was suited to my research study. It relied upon qualitative data gathered from different stakeholders in order to discover and understand their sense of meaning and their multiple views of reality concerning assignment success.

The interpretivist/constructivist researcher tends to rely upon the "participants' views of the situation being studied" (Creswell 2003, p.8). In this case, the participants multiple views of success were needed to better understand the reality. Additionally, Creswell (2003), reiterates that because qualitative research is exploratory, it will suit a situation where a phenomenon needs to be understood because little research exists on it. Furthermore, qualitative research appears to be the predominant research methodology employed by authors in previous success and ROI empirical studies (McNulty *et al.* 2009; McNulty 2013; McNulty *et al.* 2013, Welch *et al.* 2009).

### 3.4 RESEARCH JOURNAL

From the outset I decided to keep a research journal to make observations and record reflections. The maintenance of such a book is encouraged especially for qualitative research as the cycling back and forth from data collection to analysis to writing is expected and it also allows the researcher to record learnings and reflections (Kvale and Brinkmann 2009; Mortari 2015). The use of such journals it is argued can improve the qualitative research process (Ortlipp 2008).

Also, I found that writing is analysis and writing can lead to what Miles and Huberman (1994, p.74) term 'little conceptual epiphanies' to help you on your road to understanding.

### 3.5 SELECTION AND DESIGN OF THE RESEARCH INSTRUMENT

The semi-structured interview was deemed the most appropriate method to gather data to answer the research question. The semi-structured interview is one of the most common methods in qualitative research (King 2004). Kvale (1983, p. 174) describes the qualitative research interview as an “interview, whose purpose is to gather descriptions of the life-world of the interviewee with respect to interpretation of the meaning of the described phenomena”. The interviewee is seen as a participant in the research, rather than passively responding to the interviewer’s questions. It is ultimately “a production site of knowledge, as interview knowledge is socially constructed in the interaction of interviewer and interviewee” (Kvale and Brinkmann 2009, p. 54).

Bryman and Bell (2007, p. 474) define a semi-structured interview where “the researcher has a list of questions on fairly specific topics to be covered, often referred to as the interview guide, but the interviewee has a great deal of leeway in how to reply. Questions may not follow on exactly in the way outlined on the schedule. Questions that are not included in the guide may be asked as the interviewer picks up on things said by interviewees”.

Semi-structured interviews with all stakeholders will allow for the various themes to be explored in a thorough manner and will also allow for flexibility in the questioning and direction of the research interview.

#### 3.5.1 The Interview Guide and Question Formulation

The interview guide is a list of questions you intend to ask in an interview (Merriam 2009). Questions were formulated based on a detailed review of the extant literature, practitioner reports and personal industry knowledge. Question formulation covered each stakeholder (5 in total) under the following headings profile; preparation (pre-departure); current/ previous international assignment and outcomes; views and perceptions of success; the family, the

repatriation phase. For the global mobility function, additional areas were included to address the mobility profile, mobility policies, international assignment profile, organisation support provided, measurement, views and perceptions of success, and organisation repatriation support approaches.

After attending a webinar on October 18<sup>th</sup> 2016 with K2 Corporate Global Mobility, a London based consultancy, on value and ROI of global mobility and stakeholder engagement, one of the biggest takeaways was the value of GM to the business. This session prompted the inclusion of a question in the interview guide to tease this out with the relevant stakeholders.

Creswell (2003) recommends including space for recording interviewer's comments and space for recording reflective notes and this was duly incorporated and proved useful when conducting the interviews. Please see Appendix B for a copy of the interview guide. This databank of questions allowed rich textual data to be collected which upon analysis provided detailed evidence of success. The success criteria emerged from the questions in the guide that were asked in relation to the temporal stages of an assignment (pre-, in-, and post). Data was used which specifically provided evidence of success and the success criteria according to each stakeholder. When conducting interviews with dual stakes, both question areas were consulted in asking targeted questions. Not all questions were relevant and hence were excluded as appropriate.

### **3.6 PILOT PHASE**

To solicit feedback on the research instrument, I decided to undertake a pilot with colleagues. I was able to consult with my PhD colleagues and my supervisor for feedback on the interview question structure and flow. Any feedback regarding recommended changes and critiques were duly noted and incorporated into the semi-structured interview guide. The

email that was used to approach organisations for access was also reviewed by my supervisor and PhD colleagues to test for ease of understanding and any critiques were actioned therein. This solicited feedback proved valuable in the early stages of the research method design. The key learnings from this piece of the research centred on the length of the questions and to avoid the use of multiple questions. Other advice given to me centred on the appropriateness of being given enough time to ask all the questions and in some instances, due to time constraints, it may not have been possible to ask every single question as access may have been confined to a one hour slot. In the end, I felt I had a comprehensive databank of questions to allow me to answer my research question in good detail.

### **3.7 ETHICAL CONSIDERATIONS**

As this research involved the use of interviews with human subjects, it required approval by the University of Limerick's ethics committee and this was attained on May 17<sup>th</sup> 2015. I adhered to the principle of informed consent so that all research participants understood from the outset what the research is about, its purposes and their involvement in terms of time and commitment. The participants were made aware of the steps in the process and how any data will be stored and managed, as well as the fact that their privacy was not violated in any way and the confidentiality of the data will be maintained. Appendix C contains a copy of the research ethics form and the sign-off from the research ethics committee. Throughout the research, anonymity was preserved through the labelling of expatriate A, B etc. No company names are identified in the interest of confidentiality and anonymity.

### 3.8 PARTICIPANT ACCESS

As a first step a detailed email communication was drafted outlining the research, its purpose and benefits, and researcher profiles. This email was reviewed by my supervisor and PhD colleagues to get feedback on the content and to test for ease of understanding. Appendix D contains a copy of this communication. After recommended changes were incorporated, this email was circulated to my personal contacts in industry on the networking tool LinkedIn. Organisations from different sectors were targeted as this is recommended in the literature (Brewster *et al.* 2014; McNulty and De Cieri 2011). The organisations targeted were from the fast moving consumer goods (FMCG), banking and financial services, energy and professional services/consulting industries. A total number of twenty-five contacts were approached on LinkedIn, resulting in a positive outcome of only two successful hits. A more successful strategy of approaching students on the Masters programme yielded more favourable results. While LinkedIn proved somewhat useful, there is merit in the use of personal face to face contact in acquiring research samples. Such observations were captured in my research journal. Based on personal contacts and HR contacts from my industry experience and approaching students of the Masters Programmes in the University of Limerick, specifically the part-time cohort of the MSc in HRM and Work, Organisation and Psychology, a good mix of participants was arrived at via purposive sampling and snowballing. Snowball sampling is a purposive sampling approach, where the sampling is conducted with reference to the goals of the research, so that units of analysis are selected in terms of criteria that will allow the research questions to be answered (Bryman and Bell 2015).

Snowball sampling is a technique for developing a research sample where existing interviewees recommend additional interviewees from among their acquaintances and colleagues (Goodman 1961).

The stakeholders targeted as part of the research are deemed definitive and salient based on their proximal ‘stake’ in the international assignment process.

Long-term expatriates
Repatriated assignees
The HR Function
The Global Mobility Function
Line managers of expatriates (host country)

**Table 6: Proximal Salient Organisational Stakeholders in the international assignment cycle.**

### **3.9 DATA COLLECTION**

Data collection involved semi-structured interviews conducted using skype, face to face interviews and telephone interviews. Because the interview subjects were dispersed globally across Ireland, the US, the UK, Continental Europe, and South Africa, I opted to use skype and telephone interviews as a data collection method for this cohort. Telephone interviewing has been described as more practical and appropriate for hard to reach highly dispersed groups, in this instance for expatriates in particular who tend to be on the move (Bryman and Bell 2015; Easterby-Smith, Thorpe and Jackson 2015). The literature indicates that while telephone interviews do not reveal non-verbal cues and the immediate context (McCoyd and Kerson 2006; Novick 2008), the quality of data collected using this method is similar to face-to-face interviews (Sturges and Hanrahan 2004; Sweet 2002). Reflective research by Deakin and Wakefield (2014) concluded on the positive merits of skype as a data collection method. Such positive views were also confirmed by Hanna (2012) and Weinmann, Thomas,

Brilmayer, Heinrich and Radon (2012). In my opinion, it would be a particularly apt medium for data collection for a particularly mobile population to whom it can be difficult to get access to (Harrison, Shaffer and Bhaskar-Shrinivas 2014).

Interviews lasted between 40 minutes and 100 minutes, were digitally recorded and then transcribed in full. Table 7 provides a list of participant interview details.

Participant	Gender	Industry	Role	Location	Type of Interview	Duration	Date and Time
Expatriate A	Female	FMCG	Procurement Analyst	South Africa	Skype	60 minutes	August 1st 2017 @ 2pm
Expatriate B	Female	FMCG	Human Resources Manager	Thailand	Skype	100 minutes	July 28th 2017 @ 9am
Expatriate C	Male	FMCG	Compensation and Benefits Manager	USA	Skype	45 minutes	July 28th 2017 @ 9pm
Expatriate D	Female	FMCG	Supply Chain Manager	Dubai	Skype	50 minutes	August 4th 2017 @ 12pm
Expatriate E	Male	Education	Lecturer	Ireland	Face to Face	80 minutes	December 12th 2017 @ 2pm
Expatriate F	Male	Pharma / Medical Device	Commercial R&D Manager	USA	Skype	45 minutes	July 2nd 2018 @ 5.00pm
Repatriate A	Male	FMCG	Director RD&A Savoury and Snacks	United Kingdom	Skype	60 minutes	July 31st 2017 @ 4pm
Repatriate B	Male	FMCG	Compensation and Benefits Senior Analyst	USA	Skype	45 minutes	July 28th 2017 @ 9pm
Repatriate C	Male	Pharma / Medical Device	Director of Engineering	Ireland	Phone	60 minutes	June 7th 2018 @ 3pm
Repatriate D	Female	Pharma / Medical Device	Vice President of Manufacturing	Ireland	Phone	40 minutes	July 2nd 2018 @ 3.30pm
Repatriate E	Female	Fund Administration	Shareholder Services Manager	Ireland	Phone	45 minutes	May 19th 2017 @ 4.00pm
Repatriate F	Female	FMCG	Supply Chain Manager	Dubai	Skype	50 minutes	August 4th 2017 @ 12pm
Global Mobility A	Female	FMCG	Procurement Analyst/ Global Mobility Specialist	South Africa	Skype	60 minutes	August 1st 2017 @ 2pm
Global Mobility B	Female	FMCG	Global Mobility Specialist	Ireland	Phone	40 minutes	June 17th 2017 @ 10.30am
Global Mobility C	Female	FMCG	Global Mobility Senior Manager	Ireland	Face to Face	60 minutes	May 3rd 2017 @ 10am

Participant	Gender	Industry	Role	Location	Type of Interview	Duration	Date and Time
Global Mobility D	Female	Fund Administration	Global Mobility Manager	Ireland	Phone	70 minutes	January 23rd 2018 @ 11am
Global Mobility E	Female	ICT	Global Mobility / Talent Acquisition Specialist	Ireland	Face to Face	70 minutes	May 22nd 2018 @ 10am
Global Mobility F	Female	Pharma / Medical Device	Global Mobility Senior Manager	Belgium	Skype	60 minutes	Oct 19th 2018 @ 9.30am
Human Resources A	Female	FMCG	Human Resources Manager	Thailand	Skype	100 minutes	July 28th 2017 @ 9am
Human Resources B	Female	Pharma / Medical Device	HR Director	Ireland	Phone	40 minutes	June 13th 2018 @ 3pm
Human Resources C	Female	Banking/Financial Services	HR Manager	Ireland	Phone	40 minutes	May 26th 2017 @ 5.00pm
Human Resources D	Male	FMCG	Compensation and Benefits Manager	USA	Skype	45 minutes	July 28th 2017 @ 9pm
Line Manager A	Female	Pharma / Medical Device	Vice President of Manufacturing	Ireland	Phone	40 minutes	July 2nd 2018 @ 3.30pm
Line Manager B	Male	Pharma / Medical Device	Director of Engineering	Ireland	Phone	60 minutes	June 7th 2018 @ 3pm
Line Manager C	Female	Fund Administration	Asset Services Manager	Ireland	Phone	40 minutes	Feb 28th 2019 @ 9.30am

**Table 7: Participant Listing Interview Details.**

To record the skype interviews, I was able to use the recording software MP3 Skype recorder 4.49 free edition which allows 30 hours of recording in 30 consecutive days. As a back-up and to ensure sound quality the interviews were also recorded using a Dictaphone voice recorder.

Kvale and Brinkmann (2009) encourage researchers to transcribe their own interviews to learn about their interviewing style and it allows the researcher to fully understand the meaning of what was said and it also allows the researcher to start the analysis. As a first step, I listened back to the interviews and re-listened again to get a sense of the relevant success themes emanating from each stakeholder.

Twenty five stakes in total were arrived at based on 18 interviews. Some of the interviewees had a multiple stake, for example expatriate B was both a long-term international assignee and a HR manager (A). Expatriate A was both a long-term assignee and had worked as a global mobility specialist (Global Mobility A) in her previous role. Repatriate D was both a repatriate from a long-term assignment from the USA and the line manager (A) of an expatriate on a long-term assignment. Repatriate C was both a repatriate from a series of long-term assignments and a line manager (B). Repatriate F was a serial assignee having spent time in South Africa and the United Kingdom and is currently on a long-term assignment in Dubai (Expatriate D). Expatriate C is currently on assignment in the USA having repatriated from Malaysia (Repatriate B) and is also working in the human resources function (Human Resources D). Appendix E contains a list of the stakes. Table 8 contains a detailed list of the participant stakes with key details.

Participant	Gender	Industry	Role	Role Level In Organisation	Location	Professional experience	Length of service in the organisation	Nationality	Mother tongue	Marital status	Family status	Countries expatriated to if more than one	First international assignment / serial international assignee
Expatriate A	Female	FMCG	Procurement Analyst	Individual Contributor	South Africa	5 years	5 years	Irish	English	Married			First
Expatriate B	Female	FMCG	Human Resources Manager	Mid-Level	Thailand	5 years	5 years	Irish	English	Single			First
Expatriate C	Male	FMCG	Compensation and Benefits Manager	Mid-Level	USA	8 years	6 years	Irish	English	Single		Malaysia	Serial
Expatriate D	Female	FMCG	Supply Chain Manager	Mid-Level	Dubai	5 years	5 years	Irish	English	Single		UK South Africa	Serial
Expatriate E	Male	Education	Lecturer	Mid-Level	Ireland	15 years	15 years	Japanese	Japanese	Married	2 children (accompanying)	Ireland	First
Expatriate F	Male	Pharma / Medical Device	Commercial R&D Manager	Mid-Level	USA	7 years	3 years	Irish	English	Married	3 children (accompanying)		First
Repatriate A	Male	FMCG	Director RD&A Savoury and Snacks	Senior-Level	United Kingdom	25 years	15 years	English	English	Married	2 children (grown-up; non-accompanying)	USA	First
Repatriate B	Male	FMCG	Compensation and Benefits Senior Analyst	Mid-Level	USA	8 years	6 years	Irish	English	Single		Malaysia	Serial
Repatriate C	Male	Pharma / Medical Device	Director of Engineering	Senior Level	Ireland	25 years	4 years	Irish	English	Married	3 children (accompanying)	UK Belgium	Serial

Participant	Gender	Industry	Role	Role Level In Organisation	Location	Professional experience	Length of service in the organisation	Nationality	Mother tongue	Marital status	Family status	Countries expatriated to if more than one	First international assignment / serial international assignee
Repatriate D	Female	Pharma / Medical Device	Vice President of Manufacturing	Senior Level	Ireland	17 years	12 years	Irish	English	Single		USA	First
Repatriate E	Female	Fund Administration	Shareholder Services Manager	Mid-Level	Ireland	21 years	15 years	American	English	Married		Germany	First
Repatriate F	Female	FMCG	Supply Chain Manager	Mid-Level	Dubai	5 years	5 years	Irish	English	Single		UK South Africa	Serial
Global Mobility A	Female	FMCG	Procurement Analyst/ Global Mobility Specialist		South Africa								
Global Mobility B	Female	FMCG	Global Mobility Specialist		Ireland								
Global Mobility C	Female	FMCG	Global Mobility Senior Manager		Ireland								
Global Mobility D	Female	Fund Administration	Global Mobility Manager		Ireland								
Global Mobility E	Female	ICT	Global Mobility / Talent Acquisition Specialist		Ireland								
Global Mobility F	Female	Pharma / Medical Device	Global Mobility Senior Manager		Belgium								
Human Resources A	Female	FMCG	Human Resources Manager		Thailand								

Participant	Gender	Industry	Role	Role Level In Organisation	Location	Professional experience	Length of service in the organisation	Nationality	Mother tongue	Marital status	Family status	Countries expatriated to if more than one	First international assignment / serial international assignee
Human Resources B	Female	Pharma / Medical Device	HR Director		Ireland								
Human Resources C	Female	Banking/Financial Services	HR Manager		Ireland								
Human Resources D	Male	FMCG	Compensation and Benefits Manager		USA								
Line Manager A	Female	Pharma / Medical Device	Vice President of Manufacturing		Ireland								
Line Manager B	Male	Pharma / Medical Device	Director of Engineering		Ireland								
Line Manager C	Female	Fund Administration	Asset Services Manager		Ireland								

**Table 8: Participant Listing Key Details.**

This was a purposive sample across multiple organisations. All of the organisations that participated employed the use of international assignees as a global staffing strategy. The majority of the sample were sourced from a range of seven organisations operating across fast moving consumer goods (FMCG), Education, pharma, fund administration, information technology and banking/financial services. I targeted these companies through personal contacts in industry and in the University of Limerick.

### **3.10 DATA ANALYSIS AND INTERPRETATION**

All interviews were recorded, listened to and transcribed, and then manually coded using computer-aided qualitative analysis software (NVIVO version 11) and Excel in order to add rigor to the research process. Silverman (2010) cites the advantages of NVIVO as helping the researcher build conclusions based on rigorous analysis, improving rigor, facilitating team coding and research and speed at analysing large amounts of data.

NVivo Software assists in qualitative research analysis to uncover, extract and link themes and findings from rich interview data. It is also useful in the storing and cross-referencing of interview data. Anderson (2011) describes NVivo as “enabling the researcher to store all the source materials relating to his/her research, including all the raw data (in the form of text, audio files and visual images, etc.). In addition, it provides you with the opportunity to maintain a reflective journal and write notes to yourself about your ideas and progress you are achieving, making it possible to keep a record of the incremental process of data-gathering and interpretation” (Anderson 2011, p. 235).

Data collection and analysis are a simultaneous process (Creswell 2003) and are very much intertwined and on-going with continual reflection, asking questions and writing memos. Indeed, Kvale and Brinkmann (2009) refer to it as a backward spiral returning to interview

transcripts, reanalysing the interviews from new perspectives. I adopted an inductive approach to coming up with the themes transgressing between the interview transcripts and the systematic literature review. Such an approach is common in qualitative research. The thematic analysis is described in detail in the table below.

### 3.10.1 Thematic Analysis

Thematic analysis is a widely used qualitative analysis method offering a very systematic approach which allows for the organising of data into detailed accounts and interpretations of various aspects of a research topic (Braun and Clarke 2006). In order to derive meaningful themes from the data, an on-going process of coding and categorizing of the interview data needs to be followed. The open coding of the data refers to “the process of breaking down, examining, comparing, conceptualizing and categorizing data” (Strauss and Corbin 1990, p. 61). It is the process of organising the material into chunks before bringing meaning to those chunks (Rossman and Rallis 1998). Long interview statements can be reduced to a few simple categories (Kvale and Brinkmann 2009).

Applying Braun and Clarke’s (2006) six phases of data analysis to arrive at the key success themes involved the following:

<b>Phase</b>	<b>Definition</b>	<b>Applicability to Research/ Researcher Comments</b>
1. Familiarizing yourself with your data	Transcribing data (if necessary), reading and re-reading the data, noting down initial ideas.	All interviews were listened to initially, then on the second play, success criteria were noted. Any key

		<p>observations from the recording were also noted.</p> <p>Interviews were transcribed by the researcher and uploaded on NVivo.</p>
2. Generating initial codes:	<p>Coding interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code.</p>	<p>Using a combination of excel and NVIVO, initial codes were identified. This resulted in a large number 308 codes.</p>
3. Searching for themes:	<p>Collating codes into potential themes, gathering all data relevant to each potential theme.</p>	<p>A large database containing the main success criteria themes and accompanying quotations was generated.</p>
4. Reviewing themes:	<p>Checking if the themes work in relation to the coded extracts (Level 1) and the entire data set (Level 2), generating a thematic ‘map’ of the analysis.</p>	<p>From this large database a series of pivot tables are generated at each stage to identify the success criteria themes. The number of themes move from a number of 129 to 85. See Appendix F and G.</p>
5. Defining and naming themes:	<p>Ongoing analysis to refine the specifics of each theme, and the overall story the</p>	<p>These themes are further refined to 22 until the final overarching list of 20 is</p>

	analysis tells, generating clear definitions and names for each theme.	generated, definitions and the names of each success criteria are presented. A comparison to the success criteria generated by the systematic literature review is also included in Table 10. See Appendix H and I and Table 10.
6. Producing the report:	The final opportunity for analysis. Selection of vivid, compelling extract examples, final analysis of selected extracts, relating back of the analysis to the research question and literature, producing a scholarly report of the analysis.	Writing the findings results in a dichotomous view of some of the criteria as they can be viewed as both enablers or outcomes of success. This is reflected in Table 10. The criteria are discussed for each stakeholder using this table and the relevant quotations from the interview transcripts.

**Table 9: Phases of thematic analysis adapted from Braun and Clarke 2006, p. 87.**

<b>Success Criteria Fieldwork</b>	<b>SLR Success Criteria</b>	<b>Enabler/ Outcome</b>	<b>Definition</b>
Organisational Support	Organisational Support	Enabler	The formal and informal support an expatriate and a repatriate and accompanying family receives to smooth the adjustment process pre-in and post assignment. It can take many forms such as HR Support, preview trips, paperwork and documentation assistance, cross-cultural training, safety and security training, support from third party location vendors, financial support, family and spousal support, repatriation support and informal support.
Career Capital	Career Capital	Outcome	The career capital that an expatriate accumulates whilst undertaking an assignment. Positive outcomes would be career development, progression, promotion, career support upon repatriation. Negative outcomes would be experiencing a career wobble, disillusionment, exiting the organisation post or during an assignment.
Family Dimension	Family Dimension	Enabler	The family dimension and cohesion of the family unit can impact on assignment outcomes and enable or negate success. Aspects includes family (mal)adjustment, trailing spouse/partner (mal)adjustment, trailing spouse/partner career, loss of spousal income, moving as a couple, the family skillset for success.
Knowledge Development, Transfer and Application	Knowledge Stocks and Flows	Outcome	Knowledge that is developed, transferred and/or applied on assignment. Expatriates are often called in to clean up a mess, transfer a process, improve a work process, bring knowledge and skills back to the home organisation. Lack of application of knowledge gained on assignment can be perceived as a negative outcome.
Cultural Intelligence	Cultural Intelligence	Enabler & Outcome	The ability of the expatriate to navigate different cultures, adjust and thrive in the new host environment. Some sub issues that are relevant are cultural similarity and distance with regard to the home and host environments and presumed cultural similarity paradox.

<b>Success Criteria Fieldwork</b>	<b>SLR Success Criteria</b>	<b>Enabler/ Outcome</b>	<b>Definition</b>
Host Country National Integration and Buy-in	Host Dimension	Enabler & Outcome	How well the expatriate integrates and adjusts in the host country has a bearing on assignment success. The support that the expatriate receives from HCN colleagues in both a work and non-work environment setting can be crucial. Host country location characteristics (e.g. safety and security concerns) and any perceived inequity between home and host employees regarding compensation can also play a part.
Development	Competencies and Skills	Outcome	The development of the expatriate from both a personal and professional standpoint. It can cover a number of areas such as the enhancement of competencies and skills, mentoring, coaching, leadership development, earned respect, an enhanced sense of achievement, increased visibility in the organisation and opportunities for travel.
Social Capital	Social Capital	Outcome	The creation of social capital networks while on assignment, which may also be sustained in the home country after repatriation. These networks can stem from the home country, internal company networks, local support networks on the ground, expatriates as boundary spanners spreading knowledge and creating networks.
Adjustment	Adjustment	Outcome	Adjustment of the expatriate, the repatriate, the accompanying family. Adjustment can take place in both work and non-work environments. Adjustment involves making an effort and stepping out of the comfort zone. Adjustment can be equated with happiness.
Business Value and Return		Outcome	The return and value that the business realises from international assignments such as improvements in work processes, enhanced teamwork and business development.
Personality	Personality	Enabler	The personality characteristics and traits of the successful expatriate.
Performance	Performance	Outcome	The effective performance of the expatriate on assignment signalling achievement of assignment goals and objectives, assignment completion, employee engagement and commitment to the organisation.

<b>Success Criteria Fieldwork</b>	<b>SLR Success Criteria</b>	<b>Enabler/ Outcome</b>	<b>Definition</b>
Role Dimension		Outcome	Aspects of the role undertaken by the expatriate while on assignment for example the similarity of the job role in the home and new host location, satisfaction levels with the role and whether the role on assignment represents a demotion in grade level.
Readiness (Motivation and Willingness)	Readiness (Motivation and Willingness)	Enabler	The motivation, willingness and readiness of the expatriate to undertake the international assignment, the readiness of the repatriate to return to the home environment and the readiness of HR as a facilitator.
Characteristics		Enabler	Expatriate characteristics that may impact on the willingness to undertake an assignment and its successful completion, for example the life stage, family circumstances, timing, length of time on assignment
Previous International Experience	Previous International Experience	Enabler	Previous international experience acquired by expatriates which can aid in assignment adjustment. This previous experience may sometimes be formed in an education sphere where second and third level education took place abroad.
Timely Communication and Feedback		Enabler	Regular check-ins with expatriates on assignment to gain their feedback on what is working and not working so well.
Retention		Outcome	The retention of the expatriate while on assignment and the repatriate upon return to the home country.
Talent Management		Enabler	The management of international talent, the creation of global talent pools, promotion of diversity and the reward and recognition of international talent.
Line Manager Support		Enabler	The support that line managers provide to expatriates and repatriates in addition to the formal performance management system.

**Table 10: Success Criteria and Definition List.**

### 3.11 CONCLUSION

This chapter has provided an overview of the research method design, data collection and data analysis process to arrive at the key success criteria for each of the stakeholders that are the focus of this research. The key output is a table of 20 success criteria from the fieldwork stage. In comparison to the systematic literature review, there is much overlap with Organisational Support, Career Capital, Family Dimension, Knowledge, Cultural Intelligence, the Host Dimension, Competencies and Skills, Social Capital, Adjustment, Personality, Performance, Readiness (Motivation and Willingness), and Previous International Experience. New criteria that have emerged include Business Value and Return, Role Dimension, Characteristics, Timely Communication and Feedback, Retention, Talent Management and Line Manager Support. Selection Techniques and the Psychological Contract did not emerge as criteria in the fieldwork stage. The next chapter will present the findings by stakeholder in detail.

## CHAPTER 4: FINDINGS

### 4.1 INTRODUCTION

This chapter presents the key success criteria as highlighted by each of the salient stakeholders that are foci of this research. The research is presented at both the individual and the organisational level. Starting with the expatriate, each section will delve into and tease out the criteria that have been ascribed as pertinent to him or her in making an assignment successful. These criteria will be positioned as both an enabler and an outcome, albeit positive or negative.

As alluded to in chapter three, during the analysis phases it became apparent that two different dimensions need to be considered when contemplating success i.e. what enables that success (or detracts from it) and what is the return or outcome (albeit positive or negative). This dichotomal lens will be applied to examine assignment success from the view of the salient stakeholders.

These findings will be presented and positioned from both an outcome and an enabler perspective in order to garner a more fuller picture of what success means. It is not sufficient to just examine the outcomes as certain criteria will in their own right, make a contribution to ensuring the success of an assignment. Areas which enable success were alluded to in the semi-structured interviews with the stakeholders.

It is also worth noting that an individual voice is given to each of the stakeholders and then discussed cumulatively at the individual level for the expatriate and repatriate and at the organisational level for the global mobility function, the HR function and the host country line manager.

## 4.2 SUCCESS CRITERIA FOR THE EXPATRIATE – INDIVIDUAL LEVEL

The expatriate is the one stakeholder for which the majority of criteria appear to apply. The importance of the criteria will be illustrated with the views expressed by the expatriate stakeholders in the fieldwork stage. I will begin with career capital.

### 4.2.1 Criteria One: Career Capital

This is a core criteria for the expatriate, and a predominant one. Unsurprisingly, all expatriates alluded to it as a key success outcome as highlighted in the following:

*I feel that I have gotten 2 promotions in 2.5 years. I don't think the same would have happened if I was at home...I think it has been positive... when I look around the leadership team and most people there, they have all done assignments, if I follow that example, I would hope that would bring me there as well. So I do see it as a pathway to success from what I see in the business.*

Expatriate B.

The opportunity that an assignment afforded an expatriate to build their career capital was also highlighted, and subsequently to apply that experience on repatriation:

*The positive side for me on the professional side for me the key success, just recall back to how I capture this at the time but very much trying to get the experience in my career that I couldn't get back in Ireland, dealing with a part business that is more segregated here, here is so, And I am largely able to do that, in terms of roles that are tied to more the commercial side, the R & D side that are more global Head Quarter type roles so that's a very positive thing, that's something I couldn't get back in Ireland so I hope to be able to take it back and use that experience.*

Expatriate F.

*I think it is going to be good for my career because I went somewhere else to fix a problem that was a big problem, because it hadn't been fixed. I said ok, I'll go down and fix that and I have done it, I have fixed the issues that are here, I am putting processes in place so that when I am gone, it's not going to fall apart. It kind of makes it positive, you know. Overall I think going on an assignment is very good for your career.*

Expatriate A.

*I'd say it had a positive impact. I got a manager job out of it in America straight after it. Whether I would have gotten that if I stayed in HQ I doubt it.... I think it is a good thing. I think it is going to be good for future career as well.*

Expatriate C.

*Career progression would be a definite, am... I do think the career progression is your hum dinger, I think that's the main thing and well recognised in [REDACTED] I believe.*

Expatriate D.

As mentioned by two expatriates, if this career capital accumulation isn't recognised, it could result in an exit outcome:

*Yeah. Definitely, I'm really ambitious, I am looking to accelerate as much as I can ... If [REDACTED] wouldn't be recognising that for me in the next year or two years when it comes to a point, then I would be looking for a company that would recognise ... For me that needs to be recognised and rewarded probably as well if I can be so bold to say it.*

Expatriate B.

*professionally I would say it would be unsuccessful if a leader went on assignment and that leader didn't perform well or wasn't received well by the new organisation that they were working with ... so if their career just stagnated that's not success on that side. The other part would be that when they return back there is no role for them, or it gets to the point where they are not well respected or regarded as perhaps they once were, that's a challenge with the level of change that goes on in organisations from when they left to when they go back and they may not be as valued as they once were. That may not be success.*

Expatriate F.

Both the positive and negative aspects of career capital were highlighted by the expatriates in this research project and this would correlate with the literature from a positive (Dickmann and Harris 2005) and negative perspective (Benson and Pattie 2008; Bossard and Petersen

2005). The negative connotations relate more so to career capital not being recognised, which could result in expatriate exit from the organisation.

#### **4.2.2 Criteria Two: Organisational Support**

Whilst organisational support is not an outcome in itself, during the course of the interviews it became apparent that it played a facilitative role. Expatriates saw benefits in undertaking cross-cultural training and organisation sponsored preview trips (Okpara and Kabongo 2011). Other elements that were key were the provision of safety and security training particularly in more dangerously perceived locations, whilst others highlighted the importance of assistance with paperwork and visa immigration and tax issues. Organisation support, therefore, acts as a key enabler of assignment success:

*Happy with support provided. I think overall yes. I think that support came from different areas and meant that some are better than others but I think, overall I would have to say it was a positive thing, difficult to do without that.*

Expatriate F.

*The support that was there was fantastic. I think they completely covered everything. They gave us the to do list from start to finish you know, we had so many people in contact with us from different aspects in terms of kind of finding a new house, moving out of our old house, healthcare, immigration, booking flights, everything like that, there was nothing that I look back on that I thought well that was awkward that I had to do myself, no they made the transition really smooth.*

Expatriate A.

*I have to say I had a pretty positive moving experience I know people have different experiences, you need to be well organised, you need have all your documents and submit many documents to many people but as long as your under control then its fine. I do think they are very good at that and they pay the right people you know you get the full services and stuff, people met me at the airport from settling in with my apartment, all of that made the whole process a lot better.*

Expatriate B.

There appeared to be a lack of pre-departure cross-cultural training provided to the expatriates in this study. Most of the comments related to support provided upon arrival in the new host location:

*The support getting docs together, no training really. There was one training session on tax and that was it pre-departure. They did CCT when I got there.*

Expatriate C.

*The training really happened on the ground when we got there because your cultural experts are normally in the country you are going to so I knew at the stage I was moving that would happen but it didn't happen before I moved over. The knowledge of that was great. What I think was a massive benefit and what I think use a lot here is we tend to put people in touch with people that have gone already.*

*I think the cultural training is definitely a positive and would recommend it to everyone ...I think it benefits you to know nuances for every country you go into as every country has its own nuances and its own history and culture. It was the relocation company, Crowne Mobility...it's not focused on the history, it's not focused on the political, it's about how do you get on here? How are you successful here? I think that's important to know.*

Expatriate B.

The importance of safety and security training was overwhelmingly appreciated, which would be of particular relevance in more dangerous locations (Bader and Berg 2013):

*The other great support that we had when we landed was we would have got security training. I don't know if they do this for all assignments but they typically do it for South Africa. It would have been I think 3 or 4 hours of an online tutorial of how things work in South Africa, what to do, what not to do and how to stay safe cause obviously security and safety is a big issue down here.... I think it's South Africa as well...the safety and security concerns. When you socialise at the weekend you would socialise say in the village that you live in and you wouldn't really venture outside of that ... it is kind of difficult to make other friends outside of work just because there is not a big expat community down here.*

Expatriate A.

The preview trip was instrumental in giving expatriates a heads up on what a new potential host country could be like and this would have exerted a subsequent impact on their adjustment.

*We would have got 2 weeks in South Africa just to come down here, meet the team and see the company, see the lay of the land to help you make your decision, after my preview trip I knew that I definitely wanted to come down here.*

Expatriate A.

It is worthwhile to note that paperwork and immigration issues were sometimes found to result in negative experiences:

*My assignment to South Africa was a monumental c\*\*\* up, I just took over myself and did it myself and sorted it out because that is the type of person that I am. It will tarnish the whole experience. Like I was told I couldn't come home from South Africa because I didn't have a visa – happy Christmas to you too – two days before Christmas and I was like, how come this has all of a sudden become my problem but you know what I said I will just deal with it and I did and it was done, but for somebody else.... It is after taking us 45 minutes for me to remember that whereas for somebody else that would have been the first thing they would have said.*

Expatriate D.

Of particular note, the value of informal support cannot be underestimated as highlighted by one expatriate:

*I think that would be helpful maybe is as you get ready for the assignment you get the formal company support mechanisms what you really need is someone to speak to who has been through it to say ok here are the watch outs all to tell you what to look out for when you land, what you need to go through when you are trying to get settled, and here's what you need to watch for as you progress. Whether there is, I would think a recommendation would be a good way to get a peer here or someone*

*who has gone through it, to give good advice, what to watch out for to speak to about the things that are not going to be covered in the more formal programmes.*

Expatriate F.

Such a view aligns with the studies of Cole and Nesbeth (2014) and McNulty (2012) where the value of informal support is acknowledged, in some cases viewed as more valuable than the formal support mechanisms provided by organisations.

#### **4.2.3 Criteria Three: Family Dimension**

Whilst the family are not a stakeholder from the research phase, the influence of the family is peppered throughout the interviews, in addition to assignee observations in relation to family dimensional matters on assignment. Hence, I feel it is important to highlight the family dimension as important in enabling assignment success.

One assignee noted the traits required to be a successful family and the successful family skillset for assignment success:

*There needs to be a very good and strong relationship within the family, that's important, and there needs to be open communication on that part as well, and the willingness to adapt to change cause I have seen examples where it has been difficult for other colleagues, where they might be fine from a professional perspective but the spouse and family aren't happy and that's not good. I have been fortunate to have that support from my spouse but also my extended family and how solid relationships are there to be able to get the positive out of it. My kids are small so right now they are 3 and 5, at kindergarten level, it's easy cause they are just so young. I am sure even when the girls go back in a year or two years' time there will be an adjustment from that perspective.*

Expatriate F.

A strong family unit underpinned by a strong relationship, open communication a willingness to adapt to change and the presence of a supportive spouse/partner are all identified as important for success. Such views are shared by Lazarova *et al.* (2015) where they identify the skillset of a successful moveable family in a global mobility context. The key variable

identified in their research is the existence of a family underpinned by a strong healthy relationship at its core, having the right attitude about the assignment, having a sense of adventure, good communication and listening, commitment to the move on the part of all family members, a sense of humour, and a conscious effort to socialise outside of the family rather than focusing solely on the family unit - “a moveable family succeeds as a family, not as a spouse with a big career and trailing appendages” (Lazarova *et al.* 2015, p. 24).

Furthermore, moving as a couple eased adjustment resulting in a positive crossover (Van Erp, van der Zee, Giebels and van Duijn 2014):

*we would have both moved down here with the company so that obviously then made things much easier because there was two of us moving down together, it's just easier I suppose really when you move anywhere if you have somebody moving with you. I had seen a few people that have relocated down here and I suppose it is a little bit more difficult when you are on your own*

Expatriate A.

Single status assignments benefits were also highlighted to negate adjustment challenges:

*I was going over as a single person as well, no wife or anything who could have had issues, no kids who would have had adjustment issues.*

Expatriate C.

*No, it was just me. So I think that made it a hell of a lot easier.*

Expatriate D.

There were however, observations made of families where adjustment proved difficult:

*From what I hear from speaking to people, the work isn't the issue, adjustment is the issue. Very often it is the spouse that doesn't adjust, very often people take up these assignments and they just want to go but their spouse might not want to.*

Expatriate C.

*Yeah, talking to colleagues, two of my colleagues in South Africa they were a couple that moved but they also worked here, they would have both gotten the support but colleagues that I know now in Dubai, one family that are struggling to integrate because the wife has gone from working to not working so finding settling in a little bit more difficult, I think it probably is more difficult for the family because we just get our heads down and we are working. It stops being an adventure then.*

Expatriate D.

The impact of the family in terms of the decision to undertake an international assignment, and the (mal) adjustment of the family as a unit while on assignment should not be underestimated and are an important consideration for assignment success (Caligiuri, Hyland, Joshi and Bross 1998; Haslberger and Brewster 2008).

#### **4.2.4 Criteria Four: Knowledge Development, Transfer and Application**

Surprisingly, this particular outcome appears parsimonious for the expatriate cohort. One expatriate mentioned the value in the context of building technical role and business unit and regional knowledge:

*Technically as a HR person I have built my HR knowledge and as an employee I have learned a lot about the business over here so I can talk about our priorities in this region and our different portfolios and I know about the Europe business now and so there are only two more to go the Americas.*

Expatriate B.

It was demonstrated that there was an awareness on the part of the expatriate to add value and the conscientiousness of building capability and the transfer of knowledge in the host location:

*You do try and prove yourself to show that you are adding value because you shouldn't be there otherwise and you shouldn't be adding this cost otherwise. I think everyone of my expat friends would always be conscious of that. They'll always be saying well we are costing a lot we need to be adding a lot of value; and another thing that would really make me do is be conscious of building capability and leaving behind skills and experience.*

Expatriate B.

Other expatriates mentioned the lack of knowledge development and application as being subsumed in an unsuccessful assignment.

*I think from another viewpoint an unsuccessful assignment would be one where you'd come down there for 2 years for an assignment and you leave after the two years and you say I haven't gained any more knowledge in my job or I haven't progressed in what I have been doing then that's unsuccessful.*

Expatriate A.

Again, there is a recognition that the assignment affords the opportunity for knowledge transfer and process improvement, and if this is not achieved, it represents an unsuccessful assignment:

*Well I think it when you are afforded that kind of opportunity and not transfer knowledge and not bring the people on a journey with you, and leaving, and they might be doing things right but there might be a better way to do them, I think getting an opportunity like that and coming back and nobody noticing that you are gone. You can't just blend in, it's a job that you are there to do.*

Expatriate D.

#### **4.2.5 Criteria Five: Cultural Intelligence**

The ability of the expatriate to navigate across cultures and overcome cross-cultural challenges is a key to success and adjustment as illustrated below:

*then on the personal side I think it's important to have that positive and so far, it has been very positive, build up that social network, so that when I come back we will be able to continue to be friends with, and experiencing a different culture along the way.*

Expatriate F.

Expatriates value the experience that is accumulated from being exposed to different cultures and ways of working and operating in different countries and regions, and they see benefit in this:

*Gaining experience working in different cultures, working with and learning from colleagues different points of view, based on cultural differences, seeing how the world works in other countries. It helps you question the way you do things, more conscious of that, the way people operate in other countries might be different from the way they operate in your country.*

Expatriate C.

Interestingly, one of the assignees coined the phrase of ‘harmony’ and ‘living in harmony’ with other cultures which is an apt way of describing cultural intelligence and adjustment in the host location.

*Yeah, I think through the personal travel as well you do learn about the country’s history and the past and you continue to get deeper insights into why are people like this. Malaysia has Indians, Chinese and Malaysians, that’s why harmony is so important cause it would be and I have to take that in and recognise that and appreciate that. It’s more of a balancing act because you are brought over and my managers say shake it up and make an impact and settle you a bit so you are trying doing that professionally with the work subjective topic without breaking relationships personally.*

*Professionally the biggest learning and the biggest skill I think I acquired which is very intangible would be how to work with people with all types of backgrounds and all types of cultural values and beliefs.*

Expatriate B.

Cultural Similarity between home and host locations was also alluded to as being linked to assignment success as in this instance it was posited that cultural similarity between home and host locations could make adjustment easier than if one was to expatriate to a country that was more culturally distant in comparison to the home location.

*I think the work environment wasn’t particularly too different from Ireland. In terms of culture, they helped with that as well. In the first two weeks they took me out for dinner, they showed me around the place. There’s not much more to expect from that.*

*It depends where you go as well. I mean looking at America, it is the exact same as living in Ireland. So just because I mean if someone was to live successfully in the US*

*for a year it wouldn't mean they could survive in Africa, or Asia or South America. You know that kind of way.*

Expatriate C.

Interestingly, the presumed cultural similarity paradox (Vromans, van Engen and Mol 2013) was relevant for one expatriate's experience of adjusting in the UK:

*To be honest England is the toughest place I lived in. I found it very cold and I think because I expected it to be the same as at home, it's where I got the biggest shock. I was in a really quaint little village and everything was really lovely but it came as a shock as it was three months before I was actually acknowledged as to who I really was.... I travelled to the UK quite a bit, and everything else, like when we go to England, it is generally to London and that's different, but when you go to the likes of outside Manchester and Liverpool, like whoa! I struggled there the most like.*

Expatriate D.

Thus, there are instances whereby cultural similarity between home and host locations does not always result in a more successful assignment.

#### **4.2.6 Criteria Six: Host Country National Integration and Buy-in**

Host country national integration and the support from HCNs can make or break an assignment. The value gained from expatriate and local host country nationals' interaction and integration needs to be acknowledged (van Bakel 2019):

*Integrating oneself into the local team will make or break an assignment. I really think the biggest thing for me is having the buy in from the host country for the assignees because I think you aren't always going to get it but you need to get a few key stakeholders in there that will partner with whoever you are sending down.*

*Getting buy in from the locals is quite important, if they see you as a spy coming in from head office it will take you much longer to get to the crux of the problem that you are there to solve.*

Expatriate D.

Some locations can hinder this integration i.e. South Africa

*Ammm I think South Africa in particular was not the best place to live, I never would have stayed there long-term am it was just a lack of safety and the country. Now with South Africa it was all work so I didn't really have any friends outside of work, probably some of my own doing but Dubai in that regard is very different as I have some very good friends there. So I feel a hell of a lot more settled, I could call Dubai home as opposed to South Africa.*

Expatriate D.

Whilst others can be more conducive to HCN integration i.e. USA

*Am I won't say it wasn't easy and you know I would say more my wife has a good network now, I wouldn't necessarily say I would have a huge network now, but my network is part of hers so it doesn't come easy and you definitely have to make an effort a lot comes back down to where you get to live, and the resources and the community around that and we have been lucky to have landed in a good location where it makes things a bit easier.*

Expatriate F.

Host location characteristics can affect the integration between the expatriates and host country nationals. Countries characterised as terrorism endangered with safety and security concerns can hinder this integration making it more difficult to integrate and adjust, thereby having an impact on assignment success.

Additionally, due to location characteristics, there appears to be an overwhelmingly predominant focus on forming networks with work colleagues as opposed to non-work colleagues:

*No, being honest, I think all of the friends I have here are from work. I met them through the job in the office, I think that is specific to South Africa because we see this from being down here for a year and a half, and there are not a lot of expats where we are.... When you socialise at the weekend you would socialise say in the village that you live in and you wouldn't really venture outside of that .... it is kind of difficult to make other friends outside of work just because there is not a big expat community down here.*

Expatriate A.

Again, the host location characteristics are playing a role as safety and security concerns would prevent expatriates from forming relationships with host country nationals outside of the work environment. This is an important factor for assignment success and the value gained from assignee and local host interactions has been acknowledged in the literature (van Bakel 2019). This criteria links closely with the next criteria social capital.

#### **4.2.7 Criteria Seven: Social Capital**

Various aspects from developing networks in work and the non-work environment in the host location in addition to maintaining networks in the home environment were highlighted during the course of the interviews.

The maintenance of home country familial networks can act as a stabilising force as described below:

*My current head office, does it appeal to me? Not at all. But like I still have huge ties at home. I have one brother and he has three children and I have a crew of friends and we are really tight. But it doesn't matter where we are, I still always come home for Galway races and the Dublin horse show. They'll always come and visit so... well it's stabilising, you could become a nomad - oh my God where is my life.*

Expatriate D.

*having your connecting with back home and that world obviously your skype calls and your face-time and eating your foods from home and watching some programmes from home and knowing that you haven't left that world behind completely is something.*

Expatriate B.

The value of internal company networks was also confirmed.

*In my initial time when I was moving out it was 30 people who moved out in the prior few months, this whole project moved together so I knew there was twenty odd Irish people over there were there and they just had all gone through the same things I had you know your typical things in the start like with WhatsApp and Facebook groups*

*where you ask where is the hairdresser? Where is the whichever? The internal company network is vital and it still is great.*

Expatriate B.

Local Support networks in the host location can be vital, particularly outside of work.

Forming these networks can be a challenge however (Bruning, Sonpar and Wang 2012)

depending on the host location characteristics. Differences and challenges were cited for

South Africa and Dubai locations:

*Yeah but I think everybody's circumstances are different like there are some people that are great at signing up for all these expatriate forums and all that – that is my idea of hell - so I am just in a fortunate position that I happened to have friends there and since then I have met other people and yeah it's a place I like and I could say I'd like for a number of years. But I think of social networks outside work is to lead to longevity for people. In South Africa, you'd always be cagey about what you are going to end up in whereas there is a huge expatriate community in Dubai as well.*

Expatriate D.

The development of social networks within and outside the organisation can be hindered by

location and dispersed geographies with regard to where employees live as highlighted by

one assignee:

*To be honest, I'm not sure there's a big difference between the different cultures between our site in Cork and the site in the US, in Cork there is a very good social network around the company not just the people within the company tend to meet up as friends outside the company, also who is going out Friday night, that kind of thing, that doesn't happen here. Two very different networks. Some of it is driven by the geographies, back in Cork there is a central social area around Cork whereas in the US where we are the factory is out in the middle of nowhere really but here the geographical spread of people travelling from an hour and a half in a huge circle so there is no one place where people would normally congregate.*

Expatriate F.

Evidently, there are a number of factors that can assist in the development of social capital and these factors were highlighted in the interviews such as the supporting nature of internal

company networks, local support networks in the host location environment, and indeed the stabilising nature of maintaining links to the home environment. The importance of maintaining these home country links has been acknowledged in the literature and the challenges associated with maintaining same (Bruning *et al.* 2012). Again, the host location characteristics can play a role in developing and in particular, in the ease of developing relationships with host country nationals.

#### **4.2.8 Criteria Eight: Development**

As expected, the enhancement in expatriate competencies and skills, and both personal and professional development is an added benefit, with communication in a multi-cultural context a particular highlight:

*Communication would be another skill, it's really an art when you train people, brief people, educate people from all different countries with all different languages in the one language and try to make sure your message has landed and so I would see people fly in from Europe for a week and try and deliver a message bit the whole context and how you change that message to deliver your courses is very different and it is actually not something that you can really drop into this region and do... I delivered training in China and I'm hoping it definitely must stand to me for future careers, future roles and so communication and building relationships and influencing people.*

Expatriate B.

The sense of development that travel brings to the assignee was also highlighted:

*Well from a personal standpoint, it is better for a person too, if you need to save money to live in a cheaper country, there is that financial aspect to it, you get to make some friends or you might meet some people who wouldn't meet otherwise, you get to see the world really, as a personal thing, there is huge benefit to it.*

Expatriate C.

*I have had some amazing travel and personal experiences, I wouldn't give up for the world. Between walking the Great Wall of China, going to the Taj Mahal in India, walking on the gold coast in Sydney, hiking on glaciers in New Zealand, the list goes on... I think they are some of the things that I see as positive outcomes.*

Expatriate B.

The sense of achievement felt by expatriates in being able to undertake and achieve an idea one never thought possible was also highlighted:

*I think one of my biggest realisations was it's all within your reach within your grasp, I went to Nepal to hike mountains, I said to God I would never be able to do that but you actually can and if someone realise that then it's really hard to face them, it just blows it all wide open.*

Expatriate B.

Whilst there was no evidence of formal mentoring programmes for assignees, this did not prevent assignees from reaping the benefits and value of mentoring relationships with co-workers.

*There's definitely nothing formal for expats. When I moved over, we had a programme lead, an English guy who had lived abroad in many countries before and to be honest he was someone who I viewed as the father of the group and felt we could have went to him and he was very solid and very decent and if you felt if you ever got in a spot of bother, he was going to help you. It would be more informal conversations just happened that you didn't plan. Yeah I guess I felt supported but nothing formal.*

Expatriate B.

One assignee referred to expatriate visibility as a benefit in terms of access to the senior leadership team in the region:

*Again I refer to the accessibility of the senior leadership team in the region and the openness which I could approach them, the CFO of the region is an Irish man as well who has been very open and very like how are you getting on in Thailand now, would message you and say perhaps the mistakes they happened to come across and a few things that made you feel that Irish connection.*

Expatriate B.

Another assignee referred to the role that the assignment plays in leadership development skills:

*professionally I would say it would be unsuccessful if that leader went on assignment and that leader didn't perform well or wasn't received well by the new organisation that they were working with and that can happen while where they might be respected and thought that they were great leaders in the host country and in the home country translate to their new role, that wouldn't be success if they weren't able to deal with the cultural side on the business site they were put in so if their career just stagnated that's not success on that side.*

Expatriate F.

Thus, the realm of development for the expatriate ranged from the enhancement in expatriate competencies and skills, enhancements in both personal and professional development with communication in a multi-cultural context, personal development garnered from travelling, a sense of achievement from undertaking an international assignment, enhanced visibility and leadership development.

#### **4.2.9 Criteria Nine: Adjustment**

Expatriate adjustment can take many forms and it is a construct that is still under investigation and subject to expansion (Hippler, Caligiuri and Johnson 2014) as mentioned in chapter two. Expatriates alluded to many forms of adjustment both within the work and non-work environment:

*I think the adjustment was quite smooth actually as I said, we had our 2 weeks preview down here and so we knew what the place was like, we met the team, we had been to the offices, and so we kind of did our preview trip in November and we didn't actually move down here til the following February, in between the November and February we would have been in contact with the South Africa team a good bit, in terms of the transition of the job that was kind of easy because we had started it before we had moved down here so the only challenge really was when we initially arrived down here, I think it was for six weeks we were living in a hotel while we were trying to find an apartment and that was because of the market here so it was a personal challenge, it was just because there was not a lot of availability of*

*apartments here, that was just a bit frustrating from a personal point of view it was six weeks in a hotel, outside of that everything was a really smooth transition.*

Expatriate A.

Adjusting to host country nationals was also identified as a challenge:

*I find the lack of challenge on their side frustrating, I don't want you to accept it, I don't want you to say yes, I want you to ask me why and I want you to be interested enough to ask why, I definitely for my business and what I have seen people are not at the same level as they are in Europe that's why you get the opportunities here in the host. I think professionally that has been the biggest one.*

Expatriate B.

Additionally, adjusting to the host country and living conditions was something that needs to be acclimatized to particularly in locations that are culturally distant from the home location:

*Personally, it's a second world, your conveniences of the first world and his good standards that you've grown up with are not there and that can be hard. I've seen open sewers, rubbish everywhere, and public transport. Malaysia would be of the lower compared to Singapore, even Malaysia would be lower than Thailand, and Thailand is the better. You have open sewers, even the population!! , the number of people everywhere you go in a shopping centre, in a toilet, when you come from Ireland that's a massive change. They did say to us in our cultural training that you will have days when you won't want to go outside the door.*

Expatriate B.

Adjustment challenges related to leaving family and friends behind in the home location were also highlighted:

*It hasn't come without its frustrations, it hasn't come without homesickness and sadness and all of that and that's part of the whole thing I think.*

Expatriate B.

*I think, I mean, it is on the one hand it's great to go on an assignment, on the other side, there can be difficulties with it, one of the adjustments I found in the first few months was leaving behind friends and family at home, the people, your friends and your family that you can see any weekend that you want, for that, that is a big adjustment.*

Expatriate A.

Successful adjustment requires effort on the part of the expatriate and this is evidently acknowledged in the following:

*Am I won't say it wasn't easy and you know you definitely have to make an effort a lot comes back down to where you get to live, and the resources and the community around that and we have been lucky to have landed in a good location where it makes things a bit easier.*

Expatriate F.

*Am... and the main part of a successful assignment is definitely been happy in your host location and that obviously is down to a number of factors it's down to how much job satisfaction you have, how easy it is to settle in and how much you put into it, you can't kind of come to a new country and a new job with new people and expect everything to happen for you,. I think it is going to be successful if you kind of put in as much effort as you can to make it successful.*

Expatriate A.

Clearly, the expatriate has to make an effort to adjust in the new host location, adjustment isn't going to occur naturally and effort is needed on the part of the expatriate to make this adjustment happen and to make the assignment a success.

#### **4.2.10 Criteria Ten: Performance**

The performance of the expatriate on assignment can be the cornerstone of assignment success (Care and Donohue 2017; Martin and Bartol 2003). Effective performance can be regarded under the auspices of achievement of assignment goals and objectives as defined prior to the assignment and completion of the assignment. The expatriates in this study were reviewed in the context of a global performance management system and not a tailored or customized approach (Claus and Briscoe 2009; Gregersen, Hite and Black 1996):

*For some people and some assignments are different you could have a home manager and host manager, that's not the case, I don't have a home manager, from a*

*performance management perspective, it is typically pretty standard whichever your location you are at, I work here as if I'm localised. Most people here don't know that I'm an assignee so that's just the way it is, it's fine.*

Expatriate F.

The value of utilising an on-line system to support the performance management process and promoting on-going feedback between both parties was highlighted as important for effective performance management:

*My line manager would actually be located down here. My line manager is here my team that reports to me are also here. Yes, so we would have an internal review system here, it is called My Success it was previously called my PDP but it has recently been relaunched as My Success. So what they would do is we launched it this year it is really good basically you set your goals at the start of the year and you discuss them with your manager and then your team set their goals and they would discuss them with you, the difference between this process and the previous process, is that this one is open all year so you can go back in and review it as often as you want, , it is new, definitely from what I have seen so far it is seems to be working, It opens honest discussions, giving feedback whether good or bad, it really seems to open up the doors to do that.*

Expatriate A.

The location of the assignee's line manager can have an impact on the perceived effectiveness of the performance management system as highlighted in the following quotations:

*My current manager is based in Singapore now I have a dotted line to the general manager in Dubai but 'my success', which is what we call our internal system, I would think that that would be done by my manager so I don't really think it is location based. Yeah there is obviously a regional element to it. There would have to be because things that you are measured against in Europe would not work somewhere else. The same rules don't apply. I think they are pretty fair on that and we get our bonuses at the end of the year! But we look at the region to see has that region done what it was supposed to do and then has your country within that region done what it was supposed to do which I think I a fair measurement.*

Expatriate D.

*When I first moved out my manager was in Ireland an Irishman based in Ireland and that was great because day to day the crossover was small but when they are reviewing your performance the emails that you are sending them back I felt how would you know? They miss all the behavioural things for anyone quite junior I would be recommending, and I was pretty junior, I would be recommending that they are assigned a local manager.*

Expatriate B.

There is clearly a perceived benefit on the part of expatriates to have a line manager in the host location as there can be challenges with conducting performance reviews if the line manager is located back in the home location. If an assignee does not receive the best guidance and feedback on their performance, this could impact on the effective delivery of assignment objectives and subsequent success perceptions regarding the experience and outcomes from the international assignment.

#### **4.2.11 Criteria Eleven: Personality**

Different personality traits were listed as essential for success such as openness, change management, being resilient and good communication skills. Some expatriates are ‘wired’ for the challenge as this was seen as an enabler:

*I think they need to be very open, they need to be able to deal with change and adjust both professionally and personally to these circumstances that you are able to communicate well, that’s a key thing, that you need to be strong, you need to be a leader from a professional perspective to be able to have a strong presence in what you do and, the skills that you need are good leadership skills from a professional perspective and then on the personal side just to be open to that change because a lot of things are different.*

Expatriate F.

*If someone were to go and do it and no matter how much training they go on and how much coaching they get it is not always going to work. I think it takes a certain kind of person who has an interest in leaving home and seeing the world and adapting to*

*what's happening, doing what's required... if you are not wired that way, it is not going to work.*

Expatriate C.

The value of resilience and tenacity and being able to push things through and the ability to manage change were identified as key by one expatriate:

*I think in my mind it is very much we know the problem but what we don't know what it is until we go down there, I am very solutions driven, so I would take a very pragmatic approach to things. I am a bit like a bull dozer to be honest. I think that is just a personality thing as well so I think if somebody didn't have the personality, they would like just get lost.*

*You need to be thick-skinned as well. Apparently there were people in South Africa that did not want us there. And they did their utmost to get rid of us but it's how you deal with that, and how much it impacts you personally as to how successful or unsuccessful you can or can't be.*

*I really think personality type when it comes to sending people out on assignment, it's huge. Somebody having the ability to manage change is huge.*

Expatriate D.

So, clearly having the right personality characteristics contributes to this 'wiring' to allow for assignment success.

#### **4.2.12 Criteria Twelve: Role Dimension**

Job satisfaction was identified as important by one assignee as being satisfied with ones role on assignment can make the adjustment seem less difficult:

*And also the job and the job satisfaction is a huge part. I love my job down here. I really enjoy it. I love coming to work every day and I think if that wasn't the case, then it would make the whole assignment seem very difficult if I didn't like my job, and the location and I didn't like where I was living.*

Expatriate A.

Another interesting enabler was the similarity of roles and the impact that had on facilitating an easier adjustment in the host location:

*In terms of work we were working through English no problem, working on the same systems, so no issue there, doing the same process so no issue there, and doing the same type of projects, it was the same type of work as at home. There was no real issue, communication was the only issue with some people who didn't speak English well. You got over that.*

Expatriate C.

The experience and exposure gained from undertaking an assignment role was acknowledged in equipping the expatriate with the relevant knowledge and skills to allow for selection of the assignee for another assignment role in another host location:

*Yeah you are going down to a challenge, where there's a mess, there is senior management involved and that is what got me the job in Dubai is the exposure I got.*

Expatriate D.

The role of job satisfaction and the value of exposure to an assignment role, and the value of that skill acquisition in securing another assignment is noteworthy in this success debate.

#### **4.2.13 Criteria Thirteen: Readiness (Motivation and Willingness)**

A number of factors feed into the area of readiness and the readiness of the expatriate to undertake an international assignment. The motivation and willingness levels also play a role. Additionally, self-efficacy, which represents the expatriate's belief in his/her capability to complete the assignment is important (Varma *et al.* 2011).

The readiness of the expatriate participants was evident in the following:

*Am...I suppose first off really and it's the most obvious is to know exactly an assignment is for you... a lot of people would say oh yeah, I would definitely go on an assignment and that would be great, I think, the perception and then the reality tying in with that, you know, I think you have to know that as assignment is for you.*

Expatriate A.

*In terms of changed their life kind of thing but for me not traumatic, I knew what I was getting in for.*

Expatriate C.

*It was not something I actually seeked out, but was never adverse to it.*

Expatriate D.

Clearly, the willingness and readiness of the expatriate and their attitude and positive willingness to undertake an assignment is crucial.

Furthermore, there can also be positives whereby there is alignment between the individual assignee and the organisation in terms of readiness and need:

*I suppose it was a little bit of both. I would have always been eager to travel with my job so we have yearly reviews where you review your goals for the year and if you met them and all that kind of thing, and part of that yearly review is you tell the company of you are globally mobile or not so I would have always told the company, yes I would be willing to travel for the right job obviously and the right opportunity so they knew I was willing to go.*

Expatriate A.

This is an instance where individual and organisational alignment (Konopaske, Robie and Ivancevich 2009) translated into a positive opportunity for the expatriate and the organisation. Such alignment could be viewed as a win-win for both parties: *'this job came up and they knew I would be a good fit for it. They wanted me to go and I also wanted to go as well'*.

#### **4.2.14 Criteria Fourteen: Characteristics**

Certain characteristics of the expatriate can impact on the willingness to undertake and complete an assignment, be it family circumstances or age and timing regarding its suitability:

*Fortunately for us at the time there wasn't, my wife was happy to where even if we hadn't moved my wife had wanted to spend time with the kids while they were young and we were lucky from that perspective that it didn't compromise what we wanted to do, that's not always the case for other people who relocate.*

Expatriate F.

*You also need a little bit of life experience to have different perspectives, you can run away with yourself, you have a nicer house that what you are going to have at home when you are in your 20s, you probably have a cleaner coming in and whatever else and I think in your 20s, it is an awful lot to absorb but that can change who that person is. A lot more fundamentally than somebody who is in their 30s has their head screwed on, not everybody has their head screwed on either, like Dubai is no place for a twenty something year old, they'd end up in jail.*

Expatriate D.

Thus, the value of having experienced life and different perspectives can affect the readiness of the expatriate to undertake and complete an assignment.

#### **4.2.15 Criteria Fifteen: Previous international experience**

It was clear that previous international experience was an enabler and a huge help in facilitating expatriate performance (Bhatti, Battoo and Ismail 2013). This experience came from international schooling and previous roles and time spent abroad as illustrated in the following quotations:

*I think overall it went very well, I had experience of this location and some of the people from working from cork, and I would travel over here every year, I was over here a few times a year at least so from a professional perspective that was the easier part.*

Expatriate F.

*For me personally there is no big issue cause I previously lived in Bangladesh. I knew what I was getting in for so there was never going to be an issue with me as I lived in*

*Asia before so it wasn't going to be an issue coming from a western country... my view is that I think when you tell people you went to work in Malaysia for 8 months, it seems like a huge thing but when you've done it, it's like duck off ... water off a duck's back kind of thing.*

Expatriate C.

*I did also go to secondary school in France in Paris. Yeah, well I suppose getting exposed to it at a young age, it helps... I think the fact that I went to secondary school for four years in France was huge. Yeah and I mean at such a young age as well. I just adjust, I just take things for how they are, not how I believe they should be.*

Expatriate D.

Evidently, the value gained from previous international experience, be it from an education context, or from previous assignment work roles or travel, was acknowledged as important for adjustment and performance.

#### **4.2.16 Criteria Sixteen: Business Value and Return**

The value that the organisation can reap from an international assignment was acknowledged in this research. Concomitantly, in the interest of optimising the return of the international assignment to both the business and the international assignee, work process improvement was seen as a successful and valuable outcome by one expatriate.

*You don't want to come down here, have the company spend a lot of money on you for you to just do your day to day job in another location, you need to come down here, you need to make some changes, you need to put processes in place that weren't in place already and you need to fix what has to be fixed so that the day that you leave the host country, that everything is going to run smoothly without you. I think if that can happen for me when I am gone from here, then my assignment will have been a success.*

Expatriate A.

There are clearly positive outcomes that can be reaped for both the individual assignee and the organisation in the host location, these positive outcomes are subsumed in the view that the assignment would be perceived as a success.

#### **4.2.17 Criteria Seventeen: Line Manager Support**

Another important enabler of assignment success would be the support from the line manager as it is needed to ensure a successful assignment:

*So my second role, my manager was a woman a VP, so she was local, for the region, she was very senior I wouldn't have met her that often. I did feel more connected to her than to him. She would have when she did my review she would have got input from people in Ireland as well, my stuff would have crossed over both regions. And now my manager is not based in my country either, so I am wondering very much how he is going to, how that is going to work.*

Expatriate B.

Additionally the location of the line manager is seen as key, particularly in relation to performance reviews and performance management. This is especially salient when the line manager is located in another country other than the host country and performance management permeates across regions.

#### 4.2.18 Summary

To conclude for the expatriate, the following table lists the enablers and outcomes for the expatriate as identified in the field research:

<b>The Expatriate Stakeholder</b>	
<b>Enablers</b>	<b>Outcomes</b>
Organisational Support	Career Capital
Family Dimension	Knowledge Development, Transfer and Application
Cultural Intelligence	Cultural Intelligence
Host Country National Integration and Buy-in	Host Country National Integration and Buy-in
Personality	Social Capital
Role Dimension	Development
Readiness (Motivation and Willingness)	Adjustment
Characteristics	Performance
Previous International Experience	Business Value and Return
Line Manager Support	

**Table 11: International assignment success enablers and outcomes for the expatriate stakeholder.**

On further analysis applying the temporal perspective for the expatriate stakeholder success criteria yields the following:

<b>Expatriate Success Criteria from a temporal perspective</b>		
<b>Pre</b>	<b>In</b>	<b>Post</b>
Organisational Support	Career Capital	
Family Dimension	Organisational Support	
Readiness	Family Dimension	
Personality	Knowledge Stocks and Flows	
Characteristics	Cultural Intelligence (CQ)	
Previous International Experience	Host Country National Integration and Buy-in	
	Social Capital	
Characteristics	Development	
Previous International Experience	Adjustment	
	Performance	
	Personality	
	Role Dimension	
	Line Manager Support	
	Business Value and Return	

**Table 12: A temporal perspective on expatriate stakeholder success criteria.**

Based on the empirical evidence from the expatriate stakeholders, applying a temporal perspective to the enablers and outcomes yields the following:

<b>Expatriate Success Criteria from a temporal perspective</b>					
<b>Pre</b>		<b>In</b>		<b>Post</b>	
<b>Enabler</b>	<b>Outcome</b>	<b>Enabler</b>	<b>Outcome</b>	<b>Enabler</b>	<b>Outcome</b>
Organisational Support		Organisational Support	Career Capital		
Family Dimension		Family Dimension	Knowledge Development, Transfer and Application		
Readiness		Cultural Intelligence (CQ)	Cultural Intelligence (CQ)		
Personality		Host Country National Integration and Buy-in	Host Country National Integration and Buy-in		
Characteristics		Personality	Social Capital		
Previous International Experience		Role Dimension	Development		
		Line Manager Support	Adjustment		
			Performance		
			Business Value and Return		

**Table 13: A temporal perspective on expatriate stakeholder success criteria enablers and outcomes.**

### 4.3 SUCCESS CRITERIA FOR THE REPATRIATE – INDIVIDUAL LEVEL

For the repatriate the findings are paralleled with that of the expatriate as repatriates referred to their time while on assignment and the successful outcomes and enablers were referred to. I felt as a researcher that it was important to include these criteria in the debate as during that temporal timeframe they would have been immersed in an expatriate stakeholder viewpoint. Further such retrospective accounts of the assignment experience can yield different outcomes to the contemporaneous ones lived by expatriates that are currently on assignment and experiencing an assignment. Indeed the value of the temporal dimension is further acknowledged through the inclusion of the repatriate as a salient stakeholder.

I will now move to highlight and discuss the success criteria for the repatriate stakeholder.

#### 4.3.1 Criteria One: Career Capital

Similar to the expatriate, this was unearthed as a core criteria for the repatriate, and a predominant one. Its positive impact is illustrated in the following quotations:

*Definitely positive. Zero negative for me.*

Repatriate D.

*I was there for 5.5 years and I did well in my career and got a couple of promotions.*

Repatriate C.

A neutral effect, however, was posited by one repatriate where the value of the assignment was questioned, perhaps due to an out of sight, out of mind syndrome (Bolino 2007), affecting this, where assignees are overtaken by their domestic peers with regard to promotional opportunities:

*From a career perspective I don't think that particular assignment was neither positive nor negative. Within 6 months of returning 2 team leader positions were advertised and naturally I would have applied but the successful applicants had been two colleagues who were based in the Dublin office. One of these had started in the*

*company on the same day as myself. So by being away from the team and the Dublin office may have effected it. As there were no further opportunities for promotion six months later I left this organisation to work for another fund administration company.*

Repatriate E.

Aside from this one neutral account, the overall perception in relation to career capital of the repatriate was one of success.

#### **4.3.2 Criteria Two: Organisational Support**

Similar to the expatriate stakeholder organisation support acts as a key enabler of assignment success as stated below:

*To be honest with you I went to Cartus at the time the relocation agent that was absolutely phenomenal and she facilitated my requests, she was like a big sister to me when I was moving is the only way I can describe it. That was critical. I am a very excitable person, within the first afternoon looking for an apartment, found the apartment and everything else just really rolled.*

Repatriate D.

*Oh absolutely, they couldn't do enough for me. Cartus, first of all my own HR people here the support was fantastic. I literally didn't have to worry, the movers turned up, they packed everything, got delivered on the other side.*

Repatriate D.

In relation to repatriation support, some negative observations in relation to the relocation allowance lead to a perceived lack of professionalism on the part of global mobility.

*Again there were a few things niggly issues... there was a relocation allowance, when we went out and when we came back we would get the same and then when we came back we got a letter saying this is what the details of your return back and they listed the repatriation allowance, it's a different figure ....., well I don't know, it lacks a sense of professionalism*

*I mean I'll give you another example, when we went out there we took our dog with us, they paid for the dog to go no problem with that, they had it in the contract, you can take your dog but when we came back it was like I am going to sort the dog out*

*etc. and we don't pay for pets. You have to go back again and say here's the contract, it says you'll pay, yeah ok alright then. Then for three days we're thinking we are going to have to pay for the pet, it's just stupid things like that.*

Repatriate A.

*There were issues with my relocation payment at the time, whereby I remained on the Irish payroll and was supposed to get a daily COLA allowance but was never paid this. It was rectified and reimbursed to me when I came home.*

Repatriate E.

Questions were also raised in relation to the usefulness of cross-cultural training and the appropriateness of the content therein. One repatriate felt that the focus on realising a successful assignment should focus on success more in the work environment than just the in-country adjustment which was interesting.

*I think it would be interesting if I find out myself from being there and living there that Americans like to follow rules but if somebody says to you, you've got to do it this way, you do it that way, then querying it, just let them go away and do it, I found that out from being there; when I did my CCT, nobody told me or my wife that and I think that would have been really useful to know that, That CCT that we did was very much given around we are going to make it easy for you to live here for three years rather than this is what you can expect in the working environment, we didn't find the CCT on how to live in the US for three years particularly helpful being more around working culture over there would have been more useful for me.*

Repatriate A.

Such an account correlates with the mixed results of some prior studies with regard to the effectiveness of CCT (Morris and Robie, 2001; Puck, Kittler, and Wright 2008; Qin and Baruch 2010). In this instance a focus on working culture would have been deemed as more effective.

#### **4.3.3 Criteria Three: Family Dimension**

Similarly, for the repatriate, the role of the family, and varied family dimensions and considerations for trailing spouses were mentioned in the context of assignment success. The

inability of the spouse to work and the accompanying loss of income proved worrisome for one repatriate:

*Well it did in the fact that we moved in April coming into Summer, it was a new experience for us, the first, over the summer, everything was new and it was fun, she was getting the home together and getting to know the place after about I would say 6 months when winter hit and winter is quite severe in Wisconsin, I would say the last few months she didn't have anything to do, couldn't work and obviously it took her a couple of months to work, she was getting pretty fed up and saying what am I going to do today?*

*I mean there are things that when you move you lose your partner's salary and the company's response to that is I'm sorry we are not responsible for that for your partner's salary but the reality is that we have lost that income and I understand what [REDACTED] and most companies would say sorry we are not going to compensate you for that but for us it means a significant amount of financial income every year.*

Repatriate A.

The role that family considerations play in decisions to undertake or not undertake an assignment was highlighted:

*Probably the biggest challenge was, and the reason we didn't decide to take an international assignment in 2015 was because of the family situation.*

*That's probably the biggest challenge... the family, the other partner, when you move as a family unit as a couple, it's the non-working family that is the biggest challenge, they go through the same acclimatization but they've also got to do it with no professional base, whether that is finding another job, a new job, building a new career, finding education so when we had an opportunity to move to Switzerland in 2015, we declined it. It would have been good for my career but it would have been quite disruptive for the family.*

Repatriate C.

The impact of the family in terms of the decision to undertake an international assignment (Konopaske *et al.* 2005), the associated stress and disruption placed on a family moving overseas (Brown 2008), and the (mal) adjustment of the family while on assignment are important factors for assignment success (Haslberger and Brewster 2008).

#### 4.3.4 Criteria Four: Knowledge Development, Transfer and Application

Knowledge would appear to be a topic that is of particular relevance to the repatriate cohort in comparison to the expatriate cohort. As mentioned from the extant literature, time and time again, the inability of the repatriate to transfer and apply the knowledge they have acquired on assignment can result in repatriates looking elsewhere and exiting shortly after repatriating (Crowne 2009). Repatriates in this research were involved in transferring knowledge and integrating processes between the host and home location:

*The reason I took that assignment was twofold, firstly the organisation asked me to go to Germany for 6 months as part of my personal development as I was hired as a graduate and to transfer knowledge of the redemption file process back to the Dublin office. I also wanted to go to improve my language skills and by undertaking it, it greatly improved my spoken German, I was based in Hamburg working on a team that spoke no English so I had no other choice to get in there and speak it and apply it.*

Repatriate E.

*I think there are, they have different ways of working in the States I think they're aspiring to here in Europe I can see I've got first-hand knowledge and experience of what it looks like when we get there amm I think that was really useful I think. There's lots of what they did over there that we tried to integrate in what we do here that obviously coming over here some of the things that are new to the team over here so you get a little push back here with people saying why do we do that we never did it that way before but when you have witnessed it first hand and see the benefits of it, you'll want to push it through so we implemented some of the things already over here that we did over in the US.*

Repatriate A.

Knowledge of different ways of working and different markets was perceived in a positive light:

*The positive things for me was obviously if I stick to the work related pieces was one was that there was networking, knowing key people in the business over there, and knowing them very well and how they work and what their roles was, obviously a piece on experiencing different ways of working and it helps see the benefits and negatives of different ways of working. Obviously exposure to a different market and knowledge of a different market, that's of great value.*

Repatriate A.

Finally, being sought out as a subject matter expert based on the knowledge gained whilst on an assignment was highlighted:

*Amm I think it's had a very positive impact now that I am back because of the experience, people turn to me now and say if they have a query about our business in the US or how do I bring back this great big knowledge that I have never had before, experience of working and living there, so I've noticed that since I've been back.*

Repatriate A.

Thus, for the repatriate cohort task and process knowledge, networks, knowing the key contacts in the business, knowledge of different ways of working, products and markets were perceived as key positive outcomes from an international assignment.

#### **4.3.5 Criteria Five: Cultural Intelligence**

The ability of the repatriate to navigate across cultures and overcome cross-cultural challenges was acknowledged as key to success and adjustment on assignment.

*What does success mean for me, I think the fact that I went over on my own, I got out of my comfort zone and settled into a non-English speaking team. I vastly improved my language skills which was important for me. I was able to take the lead on upskilling my knowledge on redemptions and processes from the German office and transferring them to the team back in Dublin. It was great to get an overview of how things work in another country.*

Repatriate E.

*You learn so much when you are taken out of your Irishness, when you see the world through a different lens, you really do, you begin to understand stuff that you never understood either about American culture, you really do get a grip, it's a massive self-development. You got to experience working in a different country and everything that goes along with that...It's outside your comfort zone and the learnings are just huge across your professional and your personal life.*

Repatriate D.

Evident in these quotations are personal and professional learnings and benefits for the organisations, namely language skills, enhanced cultural acumen, and the knowledge transfer of company specific processes across subsidiary units with evidence of a boundary spanning outlook (Johnson and Duxbury 2010).

#### **4.3.6 Criteria Six: Host Country National Integration and Buy-in**

The repatriates, like the expatriates, in this study referred to the integration with host country nationals as a key criteria for adjusting in the new location – additionally there was support available from localised expatriates which complemented the host country national support:

*Two of my managers helped me in settling in. One was American who had come over as an expatriate and had localised in Germany and my other manager was German. Both were very helpful in helping me to settle in and get on my feet in the new location. I would have regularly socialised with these individuals outside of work.*

Repatriate E.

*When I was relocating there was a pretty senior guy on the ground in [REDACTED] and he always, he checked in with me to make sure everything was ok, that meant an awful lot to me as well.*

Repatriate D.

Interestingly, one repatriate referred to the effort that is involved on the part of repatriates to integrate with host country nationals to the point that a repatriate is immersed in a subset of society in the host location:

*Well, it does. You meet, obviously you have to engage, you have to meet, you have to go out of your way, make an effort, you get social invitations from a work environment or where from wherever else, you have to make the effort and then what you find is you do get to meet loads of people but socialising or engaging or participating even in sports, you end up being in a little subset of society which is people that are international expatriates as well or people from the home country who have an international mindset.*

Repatriate C.

Of note, one repatriate also referred to the role of children in helping HCN integration in non-work environments as illustrated in the following:

*I should have made a better effort to do that because I was inundated with visitors from the time that I got there... you tend not to make a big effort to make a string of friends, and your own network over there and I don't have any children either so I never met anybody through the schools. Shame on me that was my fault that was the one thing I would definitely do different if I were doing it again, I would make a better effort to seek my own circle of friends over there.*

Repatriate D.

*I had that buddy system on the ground but not socially, Americans and again I don't have any children, people when they move with kids, their whole circle of friends revolve around schooling, play dates etc. In the absence of that, no I don't remember being invited around to people's houses for anything like that. Again it could have been a hand I dealt myself you reap what you sow as well, huge support from a work perspective but outside of work, when you don't have children I would say it is much harder to get a circle of friends.*

Repatriate D.

Another repatriate also referred to the difficulties of socialising and integration with work colleagues outside of work:

*I just think the culture is different in the US if I go for a drink at 5pm then they all go home at 6.30 it was never quite that bonding that happens socially.... I just think the culture is different in that sense we coined the phrase actually but I never said it to Americans that the fact is that we found them to be they were very friendly but they didn't want to be your friend. If you walked into a bar, they would talk to you all evening where are you from what are you doing what do you like what's different, they'd be really friendly, if you said to them would you like to come round for dinner on Saturday night that was ... they wouldn't do it. When you got to know them much better they were extremely friendly, they'll only let you get so close.*

Repatriate A.

Such challenges, accounted for by cultural differences, prevented the formation of lasting sustained networks and relationships with work colleagues outside of the work domain.

#### 4.3.7 Criteria Seven: Social Capital

The benefits of building networks while on assignment was described in a positive light:

*The positive things for me was obviously if I stick to the work related pieces was one was that there was networking, knowing key people in the business over there, and knowing them very well and how they work and what their roles was, obviously a piece on experiencing different ways of working and it helps see the benefits and negatives of different ways of working.*

Repatriate A.

However, of particular note, was the transient nature of networks created by repatriates and how the benefits of such networks are not sustained:

*You do tend to turn over your social circle every couple of years which you need to do if you are moving internationally on an assignment, you end up socialising with a subset of society, with also those who are in transience or those who are also in similar situations and the reverse of the story is in the first few years that myself and my wife were back in Ireland we socialised with managers from the company I worked for and at one stage we decided that we would stop socialising, because you take time and effort to get to know people and build relationships and then they move on. You are feeling a bit hang on, you have put effort into this, and these relationships, it's disappointing ..... It was disappointing with the lack of building relationships. What you end up with then is either when you are in a host country as a host national or when you are an expatriate in that environment, that you end up moving in a bubble or subset of that society.*

Repatriate C.

Clearly, this lack of relationship building and moving in circles which represent a subset of that society would paint a negative perception of assignment success as social capital is not sustained.

Additionally, another relevant highlight was the maintenance of home country networks for those on assignment or close to repatriating:

*Yeah at the end of day you have to have your own plan, a fantastic network that I work to maintain as I know I will want to go back to Europe someday, I will proactively pick up the phone, I wouldn't expect somebody to hand me something, and end up with something I wanted and but they are very clear on that like on our*

*assignment contracts in there somewhere that six months before the end date it is time for you to start looking for something else.*

Repatriate F.

#### **4.3.8 Criteria Eight: Development**

Personal development motives appear to be an important factor for repatriates who have undertaken assignments. References to learning languages and enhancing language skills were particularly prominent.

*The reason I took that assignment was twofold, firstly the organisation asked me to go to Germany for 6 months as part of my personal development as I was hired as a graduate and to transfer knowledge of the redemption file process back to the Dublin office. I also wanted to go to improve my language skills and by undertaking it, it greatly improved my spoken German, I was based in Hamburg working on a team that spoke no English so I had no other choice to get in there and speak it and apply it.*

*What does success mean for me, I think the fact that I went over on my own, I got out of my comfort zone and settled into a non-English speaking team. I vastly improved my language skills which was important for me. I was able to take the lead on upskilling my knowledge on redemptions and processes from the German office and transferring them to the team back in Dublin. It was great to get an overview of how things work in another country.*

Repatriate E.

*Living in Belgium I had the opportunity of learning to speak French and to being in continental Europe. I explored that opportunity to the full.*

Repatriate C.

*Personal and career development, moving from country to county and learning to speak French comfortably, they were personal objectives as well as having a personal career.*

Repatriate C.

*I would definitely undertake an assignment again and wouldn't hesitate. It broadens the mind, you get used to different cultures, you get to meet new people and see the way people and organisations in other countries work, and share that way of working*

*and the knowledge in it. It is a huge self-development mechanism. I can't stress that enough.*

Repatriate E.

*It's outside your comfort zone and the learnings are just huge across your professional and your personal life, it opens your mind.*

Repatriate D.

The value of having a mentor on assignment was highlighted, particularly in the context of aiding the assignee in understanding cultural differences:

*I was hooked up with a mentor from the day that I got there. It would be not uncommon whether I had moved or not. There was another girl and she was in the same building as me at VP level so it definitely did help especially now I remember having chats with her about I suppose cultural issues, how to manage those ...It's useful to have a mentor over where you move to so that you can understand the cultural stuff.*

Repatriate D.

#### **4.3.9 Criteria Nine: Adjustment**

Whilst a smooth repatriation can be viewed as a positive and a success as illustrated below:

*It all fell into place, I had some good conversations with people here in Europe about what I wanted to do, where I fit and my new line manager over here, to be quiet honest that the role I am doing here was a new role to the business and everybody knew exactly what the role entailed or the roles responsibilities were but I can't really come back and complain, it's all about the move back, it happened relatively smoothly and you know cause I was coming back into a business that I knew and I was involved in for 20-25 years, it was like walking back into the old business and I knew a lot of the people and I knew the customers and products and it was very easy*

Repatriate A.

however, repatriate adjustment can be a challenge and there may be a transitioning period upon return to the home country. One repatriate described this as a feeling of remorse:

*Don't underestimate how unsettling it can be for the first couple of months when you are repatriated, I personally was very unsettled. Never in danger of leaving the organisation or anything like that, very very unsettled for quite a while after I was repatriated. It was more myself I found it very difficult to, all I'm saying is that it takes more out of you than I ever would have thought. it's almost like remorse, a feeling of remorse, because you were in Ireland, you moved to the States, everything was new and exciting, and then you come back to Ireland and it's like ok I'm back and nothing can ever be the same again and it's not as exciting as having everything new. So it's almost like some form of remorse or something is the only way.*

Repatriate D.

Additionally, the importance of the non-work environment in facilitating adjustment was stressed:

*Importantly on a personal note, I would say that the critical success factor is to make sure that when we are relocating people we get the right home environment once they leave, anybody who is repatriating somebody told me to make a list of what was critical to my happiness once I moved there, I had things on my list, very simple things, and not so simple things, I wanted an apartment, it needed to be at least a 2 bed apartment, I wanted to have outside space so that the sun shone in on and I wanted it to be within walking distance of the city because I never lived in a city, I wanted some outside space because I need light and I wanted it to be two bed roomed because I knew I would have visitors from Ireland.*

Repatriate D.

*My surroundings greatly helped in my adjustment to make it work. I lived in a fabulous corporate apartment that was fifteen minutes' walk from the office and was still within walking distance of the train and S bahn station for access to the city.*

Repatriate E.

*I have seen it here in where people have left the organisation and gone home, relationships that have broken up because that's why I think the critical success factor is less about the job and more about making sure that your out of work experience is positive.*

Repatriate D.

*I know it sounds really simple but it's a huge factor you know that once you leave work, you can go home, you can relax in an environment that you are happy in, and you recharge and you go and get up and get back into work then off you go again. I think a lot of people underestimate this, they say sure I'll just live there, it'll be grand and it won't.*

Repatriate D.

A key message from the repatriates in this study, reflecting on their time whilst on assignment, is the importance of the non-work environment and the satisfaction they experience with their surroundings, particularly their accommodation set up. I felt this was an interesting observation and worthy of noting in the context of assignment success.

#### **4.3.10 Criteria Ten: Performance**

The repatriates, similar to the expatriates, in this study were reviewed in the context of a global performance management system and not a tailored or customized approach:

*I think the way I saw it working was that my performance when I was on assignment was managed very much so as an US employee I was set objectives by my line manager in the US I was measured against those roles as though I was a permanent member of staff there so I don't think I was measured as an assignee, I was measured against an employee there, given the roles and tasks that I was given to do so I don't think they made any allowances for the fact that I was an assignee etc.*

Repatriate A.

They were assessed and their performance was managed in a similar vein to a host country national.

#### **4.3.11 Criteria Eleven: Personality**

Personality traits that are essential for success enablement such as being self-motivated, open, open to change and independent were identified during the course of the research:

*I would say you need to be self-motivated, you need to be very open to stuff that's uncomfortable because it is very uncomfortable, the thought of everything is overwhelming so you need to have a good strength of character, open to new experiences, big picture people. You need to be independent as well, you do need to be ambitious as well because that's really what drives you that's what causes you to make the initial jump in.*

Repatriate D.

*You have to be a self-starter, open, open to change, independent, and up for the challenge. Expect the unexpected I suppose.*

Repatriate E.

Such identified personality traits were in a similar vein to those identified by the expatriate stakeholder cohort.

#### **4.3.12 Criteria Twelve: Role Dimension**

Having a challenging role on the assignment was perceived as a key success criteria:

*I very quickly got into the swing of things over there, the job was a big job, a lot of people reporting into me, it was a very challenging role, it was new, I just loved the challenge of the role was the first thing, a big ask, a lot to do, it was managing organisational change as well so I would say the role was a success factor for me, it was a very challenging role. Ensure that the job is challenging, if you're moving the job will need to be a challenge.*

*Overall a hugely positive experience, I would do it again, I would recommend it but you need to be up for the challenge not for somebody who just wants to, it's not for someone who wants an easy life.*

Repatriate D.

However, on the flipside, one repatriate referred to the perceived role demotion on assignment and the negative impact it had in terms of a lack of business engagement due to being perceived as being one level down the hierarchy:

*So the job I did in the US I would have considered as a backward step from the job that I was doing before I went. .... before I went I was R&D Director in Europe I went over there as R&D manager but people say titles don't matter but I found as R&D*

*Manager that you don't get as involved in the business because people look at you as this one level down. And I didn't have the engagement with the business over there I was on that level but that made the job less enjoyable for me .....that would have been the most negative part of the experience.*

Repatriate A.

Evidently, the nature of the role and its dimensions and level can play a role in the perceived success of an international assignment.

#### **4.3.13 Criteria Thirteen: Readiness (Motivation and Willingness)**

Readiness to undertake an assignment was highlighted and underpinned by push and pull factors such as openness to undertaking a move (pull), in addition to timing issues, business motives (push) and familial circumstances (pull) which would make the move smoother:

*I was open to it, I wanted it, I was aware of it, it was what I sought.*

Repatriate C.

*I think a lot of it was do with the timing of it ....I got a call from our global head of R&D. I am not quite sure what his motivations were but he said how do you feel about taking on an assignment over in the USA? The reasons he gave me, they wanted to provide a bit more experience into that team over there to give them a bit more direction so I think in terms of timing with the move to █████, our children are grown up so we wouldn't need to re-school three children, they were grown up and independent, it seemed like a good opportunity to go and experience something different, It worked in that sense so that is how it came about.*

Repatriate A.

One repatriate coined the phrase of having a meeting with yourself to reflect and identify on what will motivate you on assignment:

*Anyone who is relocating, you really do need to sit down and have a meeting with yourself about what is going to make me happy here now and it was really the success*

*factor, I just found this amazing apartment right on the outskirts of the city, a fabulous balcony, the sun shone in, near everything, it was just fantastic. Loved it.*

Repatriate D.

The willingness to undertake another assignment was highlighted by two of the repatriates in this study:

*I would definitely undertake an assignment again and wouldn't hesitate. It broadens the mind, you get used to different cultures, you get to meet new people and see the way people and organisations in other countries work, and share that way of working and the knowledge in it. It is a huge self-development mechanism. I can't stress that enough.*

Repatriate E.

*I think we would, at the end of the three years we said would we consider another opportunity somewhere else if it arose and we said we would certainly consider it. I think we would if the right opportunity came along yes we'd consider it, I think the experience of the last cycle, we would know what to ask and what things to look out for, we'd be much more mindful of the things that can go wrong and prevent them happening.*

Repatriate A.

The benefits, key learnings and the enhanced readiness as one would know what to expect are perceived as useful.

#### **4.3.14 Criteria Fourteen: Previous International Experience**

The value of previous international experience in facilitating assignment success was highlighted:

*I had previously spent time working in the US and in Northern Germany in Bremen and this had stood to me in helping me adjust to the German way of life.*

Repatriate E.

*Within the work context, I personally didn't encounter many challenges during the relocation because of the nature of my perspective and my work but the challenges*

*are there for e.g. I was working at a management level and part of my job was to interface and connect with the rest of a global MNC so I was open to and familiar with dealing with people from different backgrounds and cultures and languages.*

Repatriate C.

Previous international experience provided the repatriate with a level of comfort in dealing with challenges if they arose. Prior experience in dealing with staff and working with staff in a multi-cultural environment was acknowledged as beneficial.

#### **4.3.15 Criteria Fifteen: Timely Communication and Feedback**

The value in having regular check-ins while on assignment was viewed as being beneficial and providing value:

*I don't think, I have been back six months now and this is the first conversation I've had with anybody about my assignment and I think I was asked to fill out a form after coming back, an online form questionnaire and I did that and cause some of it was quite negative, all the issues about having to chase stuff up this, that and the other and other things being wrong, I apologised on the form for being so negative and said if you would like to discuss it please do, I got an email back, thanks for your feedback, appreciate your honesty. They should have come back to me and asked me what didn't work, and I don't think that the debriefing process up until having this conversation this afternoon is very good. I don't think there was much follow up while I was on assignment.*

Repatriate A.

With this repatriate the check-ins did not occur, and the feedback mechanisms were not embraced fully, and the feedback was not followed up on. In this case the repatriate was very appreciative of the opportunity to discuss assignment success. The repatriate held some strong views that global mobility could be doing more to support assignees, gather feedback on what worked well, what didn't work well and subsequently action the feedback received.

#### 4.3.16 Criteria Sixteen: Business Value and Return

One repatriate perceived the return that the business gained from the assignee as a positive outcome, particularly in the product knowledge and customer knowledge sphere:

*We have a much more proactive approach to customers in Europe than they do in the US in terms of the R&D function. In the US it is much more sales - the customer relationship was much more sales driven whereas here is far more joined between sales and R&D so I think I was able to introduce that to the team over there and I think what that gave the customers was a confidence that [REDACTED] had the technical knowledge and understanding in making the experience, their products and their processes I think cause I had had much more exposure to customers in Europe I was able to talk to them about their products, their processes and talk knowledgably about what we do as well and I think a number of customers it just made them think these guys can help us because they really understand our business and I think that led to some opportunities that we might not have got otherwise, if you asked me to place a value on that – ‘laughter’ no I couldn’t.*

Repatriate A.

Additionally, it was perceived that formal feedback from the business unit would be beneficial be it positive or negative:

*I suppose equally it would be good, and I haven’t thought about this till this afternoon, that if I had some feedback at the end of the assignment from the business to say what they thought worked well and what didn’t...I’ve had nothing at all to say actually we thought rather than having other people say it, it was great having you here and good luck, I would have preferred something more formal and formal feedback to see what they thought of me, was it a positive impact on their business or a negative impact.*

Repatriate A.

This perception of seeking feedback and analysing what worked well and what didn’t work well and what value the business unit gained from the assignee is something that should be taken on board and pursued further to advance the measurement debate of assignment success.

#### 4.3.17 Criteria Seventeen: Line Manager Support

The role of the line manager and support particularly when managing someone who is repatriating can be impactful. There are instances where strained or non-harmonious relationships can exist and this can be problematic:

*Yeah even after the UK when I was back in HQ there was one of our managers and we didn't get on and that was just the way it is but looking at it from her point of view I was too big for my boots... Because I suppose she felt I should go through three layers of people to talk to her where as I used to go directly to them and long-term that was just never going to work for either of us. So yeah I think managing somebody that is repatriating back home to their home country is difficult but they are very clear on the fact when your assignment is coming up it's six months before you need to start, be it looking for a job.*

Repatriate F.

An interesting observation below by one repatriate based on his experience was the effect that line manager inexperience and cultural differences can affect support and management perceptions:

*I think I had three bosses when I was there the first boss I had for the longest period for 18 months and she said to me a couple of times I've never dealt with an assignee, I've never had to manage an assignee before so you have to forgive me if I don't know how to do this. I think it gets because of cultural differences, you work slightly different I think that can create, I wouldn't say create a lot of problems.*

Repatriate A.

Hence, the skill set and capability of the line manager in the host location can affect assignment success in the way the person is managed and supported whilst undertaking an overseas assignment.

#### 4.3.18 Summary

To conclude for the repatriate, the following table lists the enablers and outcomes for the repatriate as identified in the field research:

<b>The Repatriate Stakeholder</b>	
<b>Enablers</b>	<b>Outcomes</b>
Organisational Support	Career Capital
Family Dimension	Knowledge Development, Transfer and Application
Cultural Intelligence	Cultural Intelligence
Host Country National Integration and Buy-in	Host Country National Integration and Buy-in
Personality	Social Capital
Role Dimension	Development
Readiness (Motivation and Willingness)	Adjustment
Previous International Experience	Performance
Timely Communication and Feedback	Business Value and Return
Line Manager Support	

**Table 14: International assignment success enablers and outcomes for the repatriate stakeholder.**

On further analysis applying the temporal perspective for the repatriate stakeholder success criteria yields the following:

<b>Repatriate Success Criteria from a temporal perspective</b>		
<b>Pre</b>	<b>In</b>	<b>Post</b>
Family Dimension	Career Capital	Career Capital
Readiness	Organisational Support	Organisational Support
Previous International Experience	Family Dimension	Knowledge Stocks and Flows
	Knowledge Stocks and Flows	Social Capital
	Cultural Intelligence (CQ)	Adjustment
	Host Country National Integration and Buy-in	Line Manager Support
	Social Capital	
	Development	
	Adjustment	
	Performance	
	Personality	
	Role Dimension	
	Timely Communication and Feedback	
	Business Value and Return	

**Table 15: A temporal perspective on repatriate stakeholder success criteria.**

Based on the empirical evidence from the repatriate stakeholders, applying a temporal perspective yields the following:

<b>Repatriate Success Criteria from a temporal perspective</b>					
<b>Pre</b>		<b>In</b>		<b>Post</b>	
<b>Enabler</b>	<b>Outcome</b>	<b>Enabler</b>	<b>Outcome</b>	<b>Enabler</b>	<b>Outcome</b>
Family Dimension		Organisational Support	Career Capital	Organisational Support	Career Capital
Readiness		Family Dimension	Knowledge Development, Transfer and Application	Line Manager Support	Knowledge Development, Transfer and Application
Previous International Experience		Cultural Intelligence (CQ)	Cultural Intelligence (CQ)		Social Capital
		Host Country National Integration and Buy-in	Host Country National Integration and Buy-in		Adjustment
		Personality	Social Capital		
		Role Dimension	Development		
		Timely Communication and Feedback	Adjustment		
			Performance		
			Business Value and Return		

**Table 16: A temporal perspective on repatriate stakeholder success criteria enabler and outcomes.**

#### 4.4 SUCCESS CRITERIA FOR THE HR FUNCTION – ORGANISATIONAL LEVEL

Interviews with the HR function stakeholder yielded thirteen international assignment success criteria, which I will now move to outline and discuss.

##### 4.4.1 Criteria One: Organisational Support

Value in the preview trip and providing support to assignees is seen as a key enabler to adjustment and subsequently success as illustrated:

*What we do do I kind of have an employee and a HR hat on and what we do do for people, which I didn't do as the timing didn't allow me people do visits as well which is come over for a week and see what's it like and come home and I think that's good for people who are nervous or unsure of what they are getting themselves in for.*

Human Resources A.

*We need to ensure that they get the right HR support and compensation advice so that they don't suffer negatively from undertaking the assignment.... people should understand it before they come out and I think as HR we need to get it right for the person otherwise the person will be unhappy and I think that might colour peoples whole experience financially when they land.*

Human Resources C.

By providing the correct supports, this can facilitate the preparedness and readiness for the expatriate. One HR manager noted the value of repatriation support, specifically career support, to ensure there is no period of disillusionment:

*I do think probably because of the function I am working in as well and our job is managing people we need to be having the conversations, I have seen one guy on that SAP project I was on come off it and go home and I'd swear for about six weeks he was hanging around without really having a specific job. My heart went out to him because God he did a great year and a half in Asia, added loads of value to the business to come back over now and to be floating around, not sure what you are doing.*

Human Resources A.

Additionally, a way to ensure a successful outcome from an international assignment would be to harness the existing population of assignees in the organisation to act as advocates for global mobility:

*I would hope that they would be advocates for other people going on assignment which I don't think we harness that enough. That might be hard as so many people have mixed experiences and are less inclined to advocate it but overall if the experience has been positive, I would encourage people to talk to people about what they have done.... My positive experience, I passed on those stories to someone else and that experience ignited a fire in them to say I could do that I can go and then they go ...it can be very strategic in the sense that now you have these people in different places where which you know will do whatever you want them to do within reason, it's true.*

Human Resources A.

There are numerous support and promotion mechanisms that HR can enlist to promote international moves and contribute to their successful completion. Such supports serve to enhance expatriate readiness and willingness.

#### **4.4.2 Criteria Two: Family Dimension**

The role of the family in the willingness to expatriate was further highlighted:

*Family circumstances would be one of the main reasons for refusing to do on an international move.*

Human Resources C.

This corroborates research by Konopaske, Robie and Ivancevich (2005) which found that reciprocal relationships exist between expatriates and their spouses, whereby spousal willingness to accompany on an assignment exerted a positive influence on international assignment willingness.

#### **4.4.3 Criteria Three: Cultural Intelligence**

One HR manager pointed out the importance of cultural intelligence and building relationships whilst on assignment.

*I think certain people will be very successful and other people their character for whatever reason it doesn't gel and they don't build relationships, they don't get on with the team; that French girl actually said I can't keep coming in here every day, I'm eating lunch on my own, she felt, and my heart went out to her, she felt isolated, culturally you grow up for twenty odd years and then you are trying to adapt yourself, and you could be two hours from some of the loveliest beaches in the world but if you go in forty hours a week to a place where people don't really talk to you, you don't build real relationships, it's hard.*

Human Resources A.

*I have one woman who is having a bit of difficulty with a visa for her husband, with processes and visas and stuff like that. I think that the biggest thing won't be getting the house or the visa or whatever the biggest thing would be changing your character and mind set to adapting that to the country because they are not going to adapt to you.*

Human Resources A.

HR recognise the challenges with cultural intelligence for the expatriate and that it is required to successfully complete an assignment, and especially mind set changes may be required in order to live in harmony in the host country.

#### **4.4.4 Criteria Four: Social Capital**

The boundary spanning potential of expatriates (Johnson and Duxbury 2010) was highlighted as it promotes integration and social capital across networks in the home and host location:

*They are going to be more integrated across networks because they know people over here versus people over there, how we do it in Ireland so they are building all these bridges so they know.*

Human Resources A.

This was seen as a positive outcome for the organisation in terms of the social capital that is accumulated, knowledge and relationship building and the interconnected bridges that are built between host and home locations, something akin to Harzing's (2001) bumble bees and spiders cross-pollinating and weaving an informal communication network.

#### **4.4.5 Criteria Five: Development**

The personal development of expatriates is perceived as an important outcome:

*Achievement of the objectives of the assignment, the personal development of the assignee would be important, and the creation of networks in the new country for new business development too.*

Human Resources C.

It is also important to note that development can come in varied auspices and manners:

*I see all that, I would hope for an employee if I was the HR person I would have a lot of personal development as well whether that is making new friends, visiting new places, learning new sports, learning a new language, whatever they get into in that country that they learn something new and they're energised and motivated by that.*

Human Resources A.

The potential that the assignment represents for leadership development potential and new business development cannot be underestimated as posited below:

*If you have young leaders coming through that nothing really scares them and they are really open to anything then your leadership potential is phenomenal, these people will grow your business, sell your business, do whatever you want them to do with your business because they are happy to put themselves out of that comfort zone because they realise it's not actually that uncomfortable outside there.*

Human Resources A.

Thus, both personal and leadership development outcomes for the expatriate are deemed important for the HR function and international assignments are recognised as a useful tool for facilitating such development outcomes.

#### **4.4.6 Criteria Six: Adjustment**

The adjustment of the expatriate and their ability to build relationships and adapt to the new host location culture is important for success as argued below by the HR function:

*I do think and same with me personally and there is an adjustment phase and it takes a few months to adapt yourself so I softened out, and you definitely rub people up the wrong way when you are going through that phase so you might have to go back over relationships and back and say when I arrived I didn't understand it and didn't know what that meant for you.*

Human Resources A.

*I think certain people will be very successful and other people their character for whatever reason it doesn't gel and they don't build relationships, they don't get on with the team.*

Human Resources A.

The HR function acknowledge the time that is required for the expatriate to adjust and the importance of living in harmony and building relationships which is required for adjustment and assignment success.

#### **4.4.7 Criteria Seven: Performance**

From a HR perspective, the performance of the expatriate is an important outcome and tends to be viewed in the context of achieving the objectives of the assignment:

*Achievement of the objectives of the assignment, the personal development of the assignee would be important, and the creation of networks in the new country for new business development too,*

Human Resources C.

Additionally, an expatriate's engagement with business strategy can be facilitated via an international assignment:

*So I definitely think that people who move with the company are more connected and they're more engaged with the whole vision, mission everything.*

Human Resources A.

Hence, the HR function perceive international assignments as a useful mechanism to promote connectedness and a sense of belonging and an awareness and connectedness to the strategy of the organisation.

#### **4.4.8 Criteria Eight: Personality**

The personality of the expatriate and their ability to integrate with host country nationals on the ground can positively impact assignment success, however, the negative impact of personality clashes, resulting in locking of horns, maladjustment and unfortunately exit was illustrated by one HR manager:

*The French girl is the best example. She was in research and development and was working in Ireland and hired locally into Thailand on a local contract and I don't know what happened at the time but I got the sense that the terms and conditions she didn't fully understand or they were not fully explained to her ....it was down to the individual, her personality did for whatever reason really did not mix well with the Thai people so we had a lot of locking horns there , now we had a guy in the same role from the US in the same team who got on great with everybody, I don't think it's down to nationality, I think it's down to individuals but she was never really happy and felt very isolated on the team and it went on too long, we should have acted sooner but it came to a head anyway when she resigned.*

Human Resources A.

#### **4.4.9 Criteria Nine: Readiness (Motivation and Willingness)**

HR have a role to play in facilitating international assignments and expatriate readiness to ensure a positive outcome for all involved to ensure individual and organisational alignment:

*I do think probably because of the function I am working in as well and our job is managing people we need to be having the conversations, I would always encourage*

*people who talk to you about moving back, reach out, make your own work, talk to your own people, I love my function but we can be slow at action processes and stuff like that. So you need to say look I'm going back, what's going on in your team and stuff like that.*

Human Resources A.

*I've seen people get like that as well and they are ready to go home, they still have a month to go, they are ready to go home and they have three months to go and they are going around with a face on them, socially cut themselves off and they're really just hanging on to go and I don't ever want to get to that, I'd like to finish it while it still really excites me and motivates me and as a HR professional if I saw someone in that space.*

Human Resources A.

It is important for HR to have the correct processes in place to ensure that there is a smooth reintegration back to the home environment to prevent any periods of disillusionment prior to repatriating (Borstorff, Harris, Field, and Giles 1997).

In order to help with the readiness of expatriates, it is recommended to give them a realistic preview in the pre-assignment phase to manage expectations and paint a realistic picture for them:

*And that can be a double edged sword because you can be in touch with people who haven't had a positive experience and tell you all the bad things so if I look at that from a HR perspective we need to be quite strategic who we put you in contact with a genuinely positive person and it's not to create a false reality, you need to know in Malaysia that the sewers are not covered, that there are no footpaths you know, there's no roadworthiness tests of the cars, you need to do that with the kind of reality sense of look that's just the way it is, if you are up for it come over, if that puts you off then really think about it so trying to create that realistic preview for people.*

Human Resources A.

Thus, HR need to be strategic in terms of whom they select to provide this realistic preview to potential assignees.

#### **4.4.10 Criteria Ten: Timely Communication and Feedback**

Timely communication and feedback can play an important role in ensuring expatriate retention and prevent exit. Referring to a case that resulted in exit, having conversations and feedback provision may have resulted in a more positive outcome:

*I feel it's my role and that girl's manager and our leadership team here is to have the conversation and feedback, give relevant, timely feedback and help that person through it, I don't know if she got enough feedback early enough in, maybe that outcome might have been different.*

Human Resources A.

There is recognition on behalf of the HR function stakeholder of the value in having conversations and providing timely feedback in order to promote retention of assignees.

#### **4.4.11 Criteria Eleven: Retention**

An obvious positive outcome would be retention of the expatriate, especially in light of the dangers of exit of assignees during or post an assignment:

*So I definitely think that people who move with the company are more connected and they're more engaged with the whole vision, mission everything I think you are going to retain them longer.*

Human Resources A.

There is recognition on HR's part of the value of international assignments in promoting retention and retaining assignees for longer.

#### **4.4.12 Criteria Twelve: Talent Management**

The overreliance of assignees as opposed to the use of local hires was also highlighted, and one solution proposed was the use of a talent pool, this interlocks with the readiness criteria.

Having the correct match in your pool should result in a better assignment fit to match both individual and organisational needs thus promoting individual and organisational alignment.

*I think they overdo it a bit. I think they very often move people when there is no need to. I think it's not always a good thing moving people as there is value in looking at the local market as well. I don't think moving people is a good thing either.*

Human Resources D.

*My view is that with assignments I don't think that turning around to someone and saying there is a job here would you go on assignment? And they say yes or no. I think it's something you should be asking somebody way before an assignment comes up so somebody can put their hands up and create a potential pool cause at least that's something they can think about and the thing with the family impact and the impact on them personally ... you shouldn't offer it to someone if they have never expressed an interest. You should have a pool of people who you know want to go on assignment even before a job comes up.*

Human Resources D.

It is interesting to see HR identifying and proposing a more strategic approach to the talent management of expatriates, however, for the companies participating in this research, the actual establishment of a strategic talent pool was more of an aspirational nature.

#### **4.4.13 Criteria Thirteen: Business Value and Return**

The value that the business can reap from an international assignment should be considered but unfortunately it isn't always on the agenda in HR; there does not appear to be a focus on measurement and the business value and return may seem aspirational, however positively, there appears to be an awareness that the return should be investigated and acknowledged:

*We don't go out to the business and ask the business what value did you get from a particular assignee. We should really.*

Human Resources C.

On a positive note, the win-win that can be realised from an assignment is recognised by HR:

*Yeah so look I think it's difficult to quantify but the benefits for the business are massive .... Massive which is why I know from a HR perspective we are told to make as many of these moves happen as you can, make it work. I've just enticed a guy to move from Thailand to Malaysia, a Scottish guy, and am going to see if I can get somebody from regulatory here into Malaysia into regulatory in Malaysia so I personally would like to make as many of these moves happen so that Thai people get an international experience over there, the Thai business benefits from people coming in here. I really think it's a win-win with all of its worth and everything I do think it's positive.*

Human Resources A.

*I think from a mindset perspective anyone who moves anywhere that openness comes in which benefits the business and that business awareness and curiosity. Just all these positives that can contribute to the business.*

Human Resources A.

Thus, it would appear to be a good policy for HR to make as many of these international moves as possible happen due to the value that the business realise from such overseas moves.

#### 4.3.14 Summary

To conclude for the HR function the following table lists the enablers and outcomes for the HR function as identified in the field research:

The HR Function Stakeholder	
Enablers	Outcomes
Organisational Support	Cultural Intelligence
Family Dimension	Social Capital
Cultural Intelligence	Development
Personality	Adjustment
Readiness (Motivation and Willingness)	Performance
Timely Communication and Feedback	Business Value and Return
Talent Management	Retention

**Table 17: International assignment success enablers and outcomes for the HR Function stakeholder.**

On further analysis applying the temporal perspective for the HR function stakeholder success criteria yields the following:

HR Function Success Criteria from a temporal perspective		
Pre	In	Post
Organisational Support	Cultural Intelligence (CQ)	Organisational Support
Family Dimension	Social Capital	Retention
Readiness	Development	
Talent Management	Adjustment	
	Performance	
	Personality	
	Timely Communication and Feedback	
	Business Value and Return	

**Table 18: A temporal perspective on HR Function stakeholder success criteria.**

Based on the empirical evidence from the HR function stakeholders, applying a temporal perspective yields the following:

<b>HR Function Success Criteria from a temporal perspective</b>					
<b>Pre</b>		<b>In</b>		<b>Post</b>	
<b>Enabler</b>	<b>Outcome</b>	<b>Enabler</b>	<b>Outcome</b>	<b>Enabler</b>	<b>Outcome</b>
Organisational Support		Cultural Intelligence (CQ)	Cultural Intelligence (CQ)	Organisational Support	Retention
Family Dimension		Personality	Social Capital		
Readiness		Timely Communication and Feedback	Development		
Talent Management			Adjustment		
			Performance		
			Business Value and Return		

**Table 19: A temporal perspective on HR Function stakeholder success criteria enablers and outcomes.**

#### 4.5 SUCCESS CRITERIA FOR THE GLOBAL MOBILITY FUNCTION – ORGANISATIONAL LEVEL

This is a relatively new stakeholder with a paucity of academic research published on them. Of what is published, emanates from the professional management consultancy domain in the areas of global mobility and talent management. Through the decades, this function has largely been referred to as those within the organisation that are responsible for the management of assignees' (Mehegan 2007) but a more formal distinction as being referred to as a global mobility function has thus far remained silent. It is a new role within HR architectural structure, albeit a very important and busy role, and a function for which in the context of this research is critical to ensure assignment success. According to Deloitte (2013) the experience for both the assignee and the business is very dependent on the knowledge and expertise of the HR Professionals involved in global mobility. In some organisations local HR are closely involved in all assignments whereas in other organisations this is all managed by specialist mobility teams. Five of the seven participating organisations in this research have an established global mobility function to support assignees. However, all HR business partners should be trained in mobility issues. Even where mobility functions are fully integrated, HR still needs to identify issues and facilitate the correct conversations to mobilise international talent. A technical knowledge complexity is necessary for working in this role, with incumbents coming from tax, immigration, legal and HR backgrounds:

*Mobility is a fairly technical area, all the technicalities, the tax compliance and so on and so on, it still remains very technical.*

Global Mobility F.

Of late, there has been a strive for a more strategic focus for global mobility and this was echoed and supported in the interviews with the global mobility participants:

*Every company will be a little different and where they are on the GM phase. GM here had been very much US centred and then would be Chicago offices then, you talk about GM and people know what you mean. Whereas over in the EMEA region, it is less recognised and that I suppose GM is a function that is relatively unknown, it's not known very well. I suppose I spend a lot of time with various business units and HR various departments talking about GM, what it is, the various policies, and initially people might have thought you are just going to help people book their flights and make hotel reservations, very very basic stuff so I spend a lot of my time explaining is really something to do with advancing careers, it's about promoting the company, advancing the objectives of the company so I spend a lot of time explaining what GM is.*

Global Mobility D.

*I think for GM what we really need to do is to get away from all we do is the logistics, we book travel, we book a hotel in that's what we do and I think when we get into the fabric of the business is that it's about it's actually the talent development, its promoting this it's about the people and advancing our people and it's for their good and the good of the company*

Global Mobility D.

Most participants' functions fell under reward, with only one reporting under the talent management space:

*There is probably more alignment with total rewards but we moved to talent management as we tried to look at an assignment as an investment not just a cost.*

Global Mobility F.

Unsurprisingly, there was a focus on the assignment as an investment, rather than been treated as a cost when the global mobility function reported under talent management.

Another closely related piece is the focus on global mobility branding and promotion. There appears to be mixed evidence amongst the interview participants for this branding:

*That would be something that we would have noticed that our talent acquisition team the whole recruiting team now and they are talking about jobs to candidates, they will mention the potential of an assignment and I am finding that candidates are asking do you offer assignments, mobility and I think it's definitely recognised that this is*

*needed really to advance to have international experience so the company can say yes we will support an assignment ... we are encouraging mobility but we probably need to promote this better than it's more visible.*

Global Mobility D.

*It's a great idea to brand Global Mobility and I think it is something that will come to the fore in the next few years but at the moment I don't think any organisation can say we definitely have roles on the boards in the canteen, have you considered moving?? It's not done in a very obvious way, someone has to go looking for it, which is never a good thing. Things need to be a little more transparent.*

Global Mobility E.

Relatedly, and disappointedly, it would also appear that there is not a massive focus on measuring the returns from international assignments from both the view of the assignees and the organisation, with one global mobility professional even referring to it as a Pandora's box; such perceptions correlate with what Doherty and Dickmann (2012) refer to as the holy grail:

*The whole, the actual cost of the IA and all the services the money, that would be closely tracked so we would know our cost evaluations or estimates related to the IA. Sometimes we would engage with a company like Deloitte to help us with that and then we would track it throughout the IA, then at the end we might do a before and after but that's just really looking at a cost perspective but it's not evaluating the success of an international assignment.*

Global Mobility D.

*We put all of our thoughts and considerations into picking the candidate and then putting on assignment and once they get home, the one thing that could potentially measure success or indicate success are not really anything that people are paying enough attention to.*

Global Mobility D.

*We did couple the analytics into the GM for measurement but unfortunately it has not been successful, we haven't been successful in driving that forward and really measuring that, we didn't get to that extent and that detail which is a pity I think we do need to understand what is the return for us, skill wise be it education wise for line managers, be it relationship wise. There are things we can measure around it but we just didn't get to that level... Measurement has alluded us.... Measuring the ROI whether it was a success or not is something that we still need to tap into which I think is a huge undervalued area.*

Global Mobility E.

Thus, it would appear that a strategic focus on the measurement of global mobility and assignment success is not apparent. Notwithstanding this, there is an awareness and a recognition on the part of global mobility that certain measurements could be examined such as knowledge and relationship building, returns to line management, and returns to the business post repatriation. The predominant focus would appear to be cost tracking so true strategic measurement has alluded them.

The success criteria for the global mobility function stakeholder now follow.

#### **4.5.1 Criteria One: Career Capital**

Global mobility make reference to the career enhancement and development of the expatriate as a successful outcome and this emerged in conversation with the participants.

*Some of the/positive outcomes of an international assignment would be career progression, promotion on return from assignment, training, personal and professional development, and cultural exposure.*

Global Mobility B.

*I suppose as the individual then goes back and is able to apply what they've learned and that if they are able to potentially advance their career with this.*

Global Mobility D.

*From the individual's perspective, I would see career growth, career development, I would see visibility in the organisation, they definitely come back with new ideas, new experiences have a very positive impact on the business that they come back to and I think they come back a more rounded employee most definitely because of it.*

Global Mobility E.

However, the negative impact when an assignee's accumulated career capital is not recognised and thereby, potentially resulting in an exit, needs to be highlighted:

*International assignments can provide a lot of great knowledge and experience but they can also provide an exit strategy for a person and for someone who is ambitious you have to look at IA, someone who goes on an IA is ambitious, they are highly knowledgeable, they are great at their job, you are not going to send a mediocre performer, you are going to send a high potential, they are probably in the succession plan for somebody.*

Global Mobility E.

Therefore it is imperative that an organisation has a repatriation and a career support strategy to allow for the repatriate to apply the skills and knowledge accumulated on an international assignment.

#### **4.5.2 Criteria Two: Organisational Support**

The importance of organisational support in facilitating a successful assignment was recognised by the global mobility function:

*Support: we would, the policy, everyone who is moving, all policies cover immigration and tax, those are the standards, business units typically have a list of discretionary support items, and depending on the individual and where they are*

*going, that might be very little or the options will be things like covering the flights, the travel to the location, perhaps paying for temporary accommodation, usually for 30 days for them to stay in a serviced apartment, to get themselves settled down..*

Global Mobility D.

*I think in my time in global mobility, I never saw any failed assignments. Yeah anyone who'd go on assignment did their time and even sometimes went a bit longer, am... because I think there were no failed assignments because the company put so much support in place. So they made the transition so easy.*

Global Mobility A.

Specifically, regarding cross-cultural training, while it is beneficial, the best way to achieve cultural orientation is to experience and live in that country:

*Yeah, we give under the permanent policy, there is actually no permanent consultant but we have a cultural programme in house, that people can follow, it's an on-line programme, for our LTA's they have a cultural orientation which is usually 2 days and they have the option of doing that either at home or in the host country. It's good to know in advance but it's hard to actually to put it in a reference unless you are in the country and to have that kind of context I find that I can talk about culture to people but unless they have a reference point this doesn't mean anything. They sometimes have to be in the country, to have witnessed it or lived it to actually really understand it.*

Global Mobility D.

Surprisingly, one global mobility manager made reference to the fact that the company did not provide a formal CCT programme, very much relying on HR and mentoring programmes and the multi-cultural orientation of teams in their home location:

*From our perspective when we are moving someone, we don't actually have a third party we don't have any CCT as such, a lot of people that move would be moving to the same department and they know the people that will be working with them via skype, it would be a virtual team relationship but they would know them quite well before they go, because our org is so multi-cultural people are very aware of where*

*they are going, they are not siloed. It is very much a global planet workplace so CCT wouldn't come into it.*

Global Mobility E.

Another important point on the value of providing support to repatriates to facilitate a smooth re-integration into the home environment again was alluded to:

*It's about reengaging them again when they come home. You can't say it you went on it now you're grand. It's more than that, far more than that. It's very important, I would consider failure if the person came back and then they left the organisation, definitely a marker we have trained them, we've given them that experience and now they have decided now that I am back and I can see these opportunities, they can take advantage of that.*

Global Mobility E.

Again it is imperative that an organisation has a repatriation support strategy to allow for the smooth and effective re-integration into the home environment to promote retention and prevent exit.

#### **4.5.3 Criteria Three: Family Dimension**

The impact that the family can have on adjustment and subsequently assignment success was highlighted, particularly in relation to the inability of the trailing spouse to work, potential loss of identity and the family-work conflict and stress outcomes (Brown 2008):

*I do know anecdotally from the HR side from people that did move, they did their 2 years and they were happy to come home. They found, the family didn't find it easy to adjust and to the new way of life and inevitably a lot of the time the person who is being relocated for the role was away a lot so the family felt very isolated and many of them couldn't work so the partners couldn't work they were in jobs such as teaching and their qualification was not recognised. They become then not to put a dampener on it so I think being a mother and a housewife is the most difficult job in the world but they become that person and there is a loss of identity for the partner*

*involved and that creates its own dynamic in the relationship, the stress on the person that has been moved into the job.*

Global Mobility E.

The need to provide organisational support to the whole family unit was mentioned as necessary to avoid negative repercussions:

*I would say that we fail in considering the supports we need to put in place for the whole family rather than just the individual who is moving and that's a huge issue and I don't think every company can say that they do support husband wife, however the family is made up .... We have had instances where people have had to come home, people who have wanted to come home and been told they can't and have subsequently exited the organisation which is also not good which is definitely down to the supports we put in place, we are not supporting them enough, maybe it's down to resourcing and cost.*

Global Mobility E

While acknowledged as necessary this support to the accompanying family is unfortunately not always provided as the family are not perceived as a salient organisational stakeholder (Lämsä *et al.* 2017).

#### **4.5.4 Criteria Four: Knowledge Development, Transfer and Application**

Knowledge development, transfer and application is perceived as a positive outcome from the assignment. It's much more than just building knowledge, it is about sharing and applying that knowledge (Minbaeva and Michailova 2004):

*I suppose as the individual then goes back and is able to apply what they've learned and that if they are able to potentially advance their career with this and then that they can, things like, depending on their job that they are able to secure other clients or that they are able to turn around a difficult situation cause of this extra knowledge or because they have they are now able to look at something in a different way. Also just that there is a development there, professional development and personal development, and that I would hope that they continue on with the organisation and that would be the first thing that they continue with the organisation, they can use the*

*knowledge, the career growth and potentially become more effective in what they are doing, that's how I would look at some of the success of an assignment.*

Global Mobility D.

The benefits of transferring this acquired knowledge and insights was coined by one global mobility professional as a 'cross-contamination' and this was viewed as both important and a success:

*When you are talking about the ROI this person is coming back with the learnings from the other region and the key relationships from the other region, they are coming back with huge insights into what is going on, it could be bringing process improvements into the home region again and as well as that you are looking at what they have initially learned from their home region to the new region so that cross education is a huge ROI but I don't think enough value is put on that, I think cross-skilling, I call it cross-contamination, across the world is very very important and we have been successful, we have people who have moved and it has been so successful.*

Global Mobility E.

Such views on cross-contamination align with the views of Harzing (2001) in relation to expatriates as bumble bees cross-pollinating ideas and knowledge from subsidiary to subsidiary.

#### **4.5.5 Criteria Five: Cultural Intelligence**

Cultural intelligence was noted as an outcome from undertaking an international assignment:

*They survive, they will all say it has been an amazing time, personally and very much professionally because they better understand how things are done elsewhere and why people do this and why people are working in a certain way and I rarely have people who will, I've never had somebody say they wished they hadn't taken the assignment, I've had people say they have found it extremely difficult but overall they don't regret coming over so I suppose from their perspective that's how they are looking at it.*

Global Mobility D.

This viewpoint was immersed in the positives of completing and surviving an international assignment both personally and professionally.

#### **4.5.6 Criteria Six: Host Country National Integration and Buy-in**

Whilst the HCN socialisation literature has referred to the existence of a perceived inequity between home and host employees, and the negative impact that this can have in relation to expatriate relationships with employees in the host location (Toh and DeNisi 2007), however, there was no evidence of this in this research project:

*No its not cause of the systems we have put in place and the policies and procedures around a move so yes they get their daily allowance a person in the host country working in a similar job could go well they are getting eighty dollars a day and I'm not but then again they could have their whole family and they are only getting eighty dollars a day, so they are still using their own salary, it's comparable, we would not put one above the person that is their direct comparator so we would compare them directly to someone at the same level, same experience, same grade, the person on IA will not benefit from the IA, they are kept on the same living standards costs as someone who is a direct comparator in that country ..... financially no, not an issue for us because our policies are so stringent for us around how we calculate it.*

Global Mobility E.

The organisations who participated in this research had robust and stringent compensation and global mobility policies to prevent inequity and perceived inequity.

#### **4.5.7 Criteria Seven: Social Capital**

From a social capital perspective, the mobility function tends to refer to the networking and the relationships that are developed during the assignment as positive outcomes:

*You can spend a million on an assignment but you could get back a lot more in terms of the experience, the networking, the relationships, the business that you might have attained.*

Global Mobility D.

*When you are talking about the ROI this person is coming back with the learnings from the other region and the key relationships from the other region, they are coming back with huge insights into what is going on, it could be bringing process improvements into the home region again and as well as that you are looking at what they have initially learned from their home region to the new region.*

Global Mobility E.

The key learnings, process improvements, and networks that are developed are seen as important by the mobility function.

#### **4.5.8 Criteria Eight: Development**

The development of the assignee, both personally and professionally, was deemed a positive outcome from undertaking a successful assignment as illustrated in the following:

*From the individual's perspective, I would see career growth, career development, I would see visibility in the organisation, they definitely come back with new ideas, new experiences have a very positive impact on the business that they come back to and I think they come back a more rounded employee most definitely because of it.*

Global Mobility E.

*I suppose as the individual then goes back and is able to apply what they've learned and that if they are able to potentially advance their career with this and then that they can, things like, depending on their job that they are able to secure other clients or that they are able to turn around a difficult situation cause of this extra knowledge or because they have they are now able to look at something in a different way. So am. Also just that there is a development there, professional development and personal development... that's how I would look at some of the success of an assignment.*

Global Mobility D.

Again, in this instance the predominant focus is on career growth and development and a recognition of a positive impact on the business.

#### **4.5.9 Criteria Nine: Adjustment**

The adjustment of the expatriate on assignment and the fact that the expatriate manages to survive outside of his/her comfort zone is viewed as a successful achievement:

*It could be a simple thing, they had to learn how to cook, they had to figure out, they had to go grocery shopping... it can be quite extraordinary that people are pushed beyond all limits that they are not, they are totally out of their routine, they are out of their comfort zone, they will all go through this patch, they would wonder what on earth have they done.. They survive, they will all say it has been an amazing time.*

Global Mobility D.

#### **4.5.10 Criteria Ten: Performance**

The performance of the expatriate would be regarded as an important outcome by the global mobility function with the desire for the expatriate to become more effective in his/her role:

*I suppose as the individual then goes back and is able to apply what they've learned and that if they are able to potentially advance their career with this and then that they can, things like, depending on their job that they are able to secure other clients or that they are able to turn around a difficult situation cause of this extra knowledge or because they have they are now able to look at something in a different way and potentially become more effective in what they are doing, that's how I would look at some of the success of an assignment.*

Global Mobility D.

An interesting finding relates to the approach taken in one organisation in the pharma/medical device sector attempting to align business, employee and assignment value, whereby the strategic intent for an international assignment feeds into the objective setting and performance review process. Indeed, such an approach and viewpoint was unique to this particular organisation, and represented the most promising strategic perspective on measurement. The impetus for this move occurred when the global mobility function moved from reporting into Reward to Talent Management. Indeed this organisation was unique in that it was the only organisation that reported under Talent Management:

*What we started to do to also drive this change and changed mind set in the organisation is that we have developed what we call strategic intent for an international assignment and this strategic intent actually played an important role in aligning the business and the employee value with the value of an assignment... It's a combination of the overall role link to strategic intent and feeds annual goals and objectives to consider these as part of the succession planning conversation and preparing for the next role.*

Global Mobility F.

#### **4.5.11 Criteria Eleven: Readiness (Motivation and Willingness)**

The readiness, motivation and willingness of the expatriate is considered in the context of assignment success and the desire to undertake an assignment:

*People have an appetite to move around they want to go to California, they want to go to Boston, they want to go to the Philippines, they want the experience for a year or two that different lifestyle, different culture.*

Global Mobility E.

Such readiness can be maximised by getting the fit and alignment correct between the assignee and the organisational motives:

*We tried to look at an assignment as an investment not just a cost and that we want that and we refer to this in global mobility planning. We connect the right people for the right type of assignment for the right duration, the right role to the right place and this is often a key element to make an assignment a success.*

Global Mobility F.

Such alignment and strategic placement of talent is perceived as a key enabler of assignment success.

#### **4.5.12 Criteria Twelve: Previous International Experience**

This was touched on briefly and referred to from a capability perspective in that having the experience of moving can be beneficial for success.

*I think you need to judge it by the character of the person as well, there are people who move and maybe they have moved several times and they are very capable of looking after themselves and there are other people and this might be their first time and that's a huge issue because the success or failure of a project could depend on it.*

Global Mobility E.

#### **4.5.13 Criteria Thirteen: Timely Communication and Feedback**

Timely communication and regular feedback is needed to facilitate a successful assignment, with regular conversations and contact encouraged as illustrated below:

*Their career, before they even leave the host country, HR and line manager need to have a very open conversation with the person coming back, you've done this, what do you now want, that career progression that still needs to continue after the IA. After the IA there is a massive risk that either the employee will leave or that they become disengaged. I've done this now and I'm back where I was 2 years ago and I am not happy and that's a massive issue.*

Global Mobility E.

*There should be more contact from HR with the assignee throughout the assignment not just when they are about to return when the notification is generated.*

Global Mobility E.

Global mobility would tend to conduct briefings with repatriates at the end of the assignment, which represents a good opportunity to acquire feedback on the positives and negatives of the assignment experience:

*Before people leave, when they are in Limerick and they are finishing up their assignment and they are ready to go home I would conduct a repatriation briefing*

*and I'll ask them about their whole experience, I suppose from their perspective, they're defining success in they've completed their project, they've done what they were supposed to do, it's a lot more than that, they will all say that they did the job but it was such a better experience that it was just getting to know a different team, it was getting to know a team in a different part of the world and how they work and how they collaborate, the pace of the work, the way they will work with management or partner with other teams and then they will talk about their personal development.*

Global Mobility D.

An interesting finding in relation to global mobility and line manager interaction regarding feedback on assignment success would appear to be piecemeal and acquired anecdotally without the existence of any formal processes and procedures, this may be related to the narrow view that assignment completion equates to success and the importance that is given to measurement in the organisation:

*Interaction between global mobility and the line manager's regarding the success of an assignment, I would presume it can be very anecdotal. We would get feedback anecdotally, they've come back, they've brought back such and such and such but it's not measured, it's not hard measure data, it's not done in a formalised way which is not ideal, we do need to measure the success when they come back and what they've brought back with them.*

Global Mobility E.

#### **4.5.14 Criteria Fourteen: Retention**

Similar to the HR function stakeholder, retention was another perceived positive outcome from undertaking international assignments as identified below:

*I would hope that they continue on with the organisation and that would be the first thing that they continue with the organisation, they can use the knowledge, the career growth and potentially become more effective in what they are doing, that's how I would look at some of the success of an assignment.*

Global Mobility D.

*You might evaluate after an international assignment evaluate the retention rates of people and how long, are they leaving within 6 months which is a real red flag there, you have done something very wrong.*

Global Mobility D.

In addition, it was highlighted by one mobility professional of the advantages of using an international assignment as a retention tool:

*Retention wise is a massive issue, there are certain individuals that may have reached a ceiling in their role and by doing this they have broken that ceiling onto the next stage, through tis mobility and change so that retention tool is massive which I think is really important. I don't think companies use it enough as a plus to their company and retention in this day and age is a massive issue,*

Global Mobility E.

#### **4.5.15 Criteria Fifteen: Talent Management**

Talent management and the effective deployment and management of international talent is perceived as an important enabler:

*From a GM point of view the positives are definitely you are adding wealth to the organisation whether it be knowledge wise which is the big one, also retention wise is a massive issue, there are certain individuals that may have reached a ceiling in their role and by doing this they have broken that ceiling onto the next stage, through this mobility and change so that retention tool is massive which I think is really important. I don't think companies use it enough as a plus to their company and retention in this day and age is a massive issue .... I think that retention element and the talent element are huge and I think they are the two main reasons why mobility is so important because talent if they are not being entertained they get bored and they start looking elsewhere. A new environment, a new country and different ways of doing things keeps people sharp.*

Global Mobility E.

One global mobility professional, reflecting on the perceptions of stakeholders with regard to the global mobility function in the USA and in Europe, surmises the differences from both an operational and logistical perspective (in Europe) to the strategic management of talent (in USA). Ultimately, global mobility should be about career and talent development:

*I find that from working in the States for a long time and then coming back it is very much in its infancy and you don't really have that recognition to what this role, this function, what it's all about and I don't like to use the word function as it sounds like we are just a tick box type thing but at the same time. If you look at other parts of HR that are hard to define e.g. organisation development these are things where people kind of look at you I kind of know what you mean but really what do you do ..I think for GM what we really need to do is to get away from all we do is the logistics, we book travel, we book a hotel in that's what we do and I think when we get into the fabric of the business is that it's about it's actually the talent development, its promoting this, it's about the people and advancing our people and it's for their good and the good of the company*

Global Mobility D.

International assignments are perceived as pivotal for effective talent management:

*Keep them fresh, keep them edgy especially the high potentials aren't going to spend seven years in the same role doing the same job, they reach a pinnacle at about 2.5 years 3 year and then are itching for the next move. You need to move them so that they can move along. International assignments are pivotal in that.*

Global Mobility E.

#### **4.5.16 Criteria Sixteen: Business Value and Return**

The potential return to the business from international assignments is well recognised by the global mobility function in terms of the following:

*You can spend a million on an assignment but you could get back a lot more in terms of the experience, the networking, the relationships, the business that you might have attained.*

Global Mobility D.

*From the individual's perspective, I would see career growth, career development, I would see visibility in the organisation, they definitely come back with new ideas, new experiences have a very positive impact on the business that they come back to and I think they come back a more rounded employee most definitely because of it.*

Global Mobility E.

The focus for business value and return for the mobility function centres around the enhanced skills and knowledge derived from enhanced experience, enhanced social capital from networking and relationship building, new business development, enhanced career capital, which would be translated into enhanced organisational capabilities. Unfortunately, there was little evidence from the organisations in this study that these outcomes were actively tracked and measured.

#### 4.5.17 Summary

To conclude for the global mobility function the following table lists the enablers and outcomes for the function as identified in the field research:

<b>The Global Mobility Function Stakeholder</b>	
<b>Enablers</b>	<b>Outcomes</b>
Organisational Support	Career Capital
Family Dimension	Knowledge Development, Transfer and Application
Cultural Intelligence	Cultural Intelligence
HCN integration and Buy-in	HCN integration and Buy-in
Readiness (Motivation and Willingness)	Social Capital
Previous International Experience	Development
Timely Communication and Feedback	Adjustment
Talent Management	Performance
	Retention
	Business Value and Return

**Table 20: International assignment success enablers and outcomes for the global mobility function stakeholder.**

On further analysis applying the temporal perspective for the global mobility function stakeholder success criteria yields the following:

<b>Global Mobility Function Success Criteria from a temporal perspective</b>		
<b>Pre</b>	<b>In</b>	<b>Post</b>
Organisational Support	Family Dimension	Career Capital
Readiness	Cultural Intelligence (CQ)	Knowledge Stocks and Flows
Previous International Experience	Host Country National Integration and Buy-In	Development
	Social Capital	Timely Communication and Feedback
	Development	Retention
	Adjustment	Talent Management
	Performance	Business Value and Return
	Timely Communication and Feedback	

**Table 21: A temporal perspective on Global Mobility Function stakeholder success criteria.**

Based on the empirical evidence from the global mobility function stakeholders, applying a temporal perspective yields the following:

<b>Global Mobility Function Success Criteria from a temporal perspective</b>					
<b>Pre</b>		<b>In</b>		<b>Post</b>	
<b>Enabler</b>	<b>Outcome</b>	<b>Enabler</b>	<b>Outcome</b>	<b>Enabler</b>	<b>Outcome</b>
Organisational Support		Family Dimension		Timely Communication and Feedback	Career Capital
Readiness		Cultural Intelligence (CQ)	Cultural Intelligence (CQ)	Talent Management	Knowledge Development, Transfer and Application
Previous International Experience		Host Country National Integration and Buy-In	Host Country National Integration and Buy-In		Development
		Timely Communication and Feedback	Social Capital		Retention
			Development		Business Value and Return
			Adjustment		
			Performance		

**Table 22: A temporal perspective on Global Mobility Function stakeholder success criteria enablers and outcomes.**

## 4.6 SUCCESS CRITERIA FOR THE HOST COUNTRY LINE MANAGER – ORGANISATIONAL LEVEL

This is a stakeholder for which the focus has largely concentrated on the role of mentoring and the role of home and host supervisors in support. Little is known about their views of success from both an individual and an organisational perspective. Line managers play a key role on a day to day basis in supporting both expatriates and repatriates. Naturally, it would make sense to incorporate the views of the line manager in whose bailiwick the expatriate and repatriate is operating. For this research the host country line manager has been selected as in this context they are the most proximal organisational stakeholder managing the performance and development of the expatriate on assignment. I acknowledge the limitations in the sample size of the host country line manager population for this research but the insights that have been provided allow us to gain a picture of what success means for them. Twelve criteria were unearthed during the interviews with this particular stakeholder cohort.

### 4.6.1 Criteria One: Career Capital

The views of the line manager concerning career and career advancement for the international assignee is illustrated in the following as a key outcome objective:

*If you look at it from an employer's point of view they have significant objectives, the company wants to make sure that each assignment is completed as a success and that the individual assignee so that they grow overall in their career and are ready and part of an overall development process for them.*

Line Manager B.

*They have all gone to more senior positions in their own groups as well and that's a direct result of the assignment experience.*

Line Manager C.

There appears to be an acknowledgment on the part of the host country line manager that promotion and career advancement were a direct result of undertaking an international

assignment(s). Hence, the host country line manager recognises the value of career capital for the expatriate in terms of promotion and development outcomes.

Another interesting observation is where an assignee may become too big for their boots and exits whilst on assignment:

*Or then it's too successful and this happens too where you move somebody to a new location, it's part of a career planning situation within a company, they like it too much, and they leave or they step out of the organisation and I am not moving with you and I've found a better situation here, they are no longer engaged and happy in their new location. That's not successful, but very successful for the individual but not from the company's point of view. When they come home, they are too big for their boots.*

Line Manager B.

In such instances, the organisation may not view this as a successful outcome, however for the individual assignee, this may be viewed as success as they have acquired career capital and moved to another organisation which benefits from the company's prior international assignment investment.

#### **4.6.2 Criteria Two: Organisational Support**

The role that the host country line manager plays in providing support to assignees when they first arrive in the host location is crucial for success as illustrated here:

*We try to do as much as we can, bringing them in and out to the immigration office in town, help them get their bank account set up, we went to the phone shop to set their sim up, just little things like that to provide as much support as possible when they arrive, the first couple of days when they arrive that's massive, even if it's just picking them up from the bus, or giving them your phone number, or making yourself available, that's key.*

Line Manager C.

Bourgeoning paperwork documentation requirements were found to have a challenging impact on the line manager creating hurdles for assignment start dates:

*I suppose the planning and the pre bit is key, that's where our global mobility group come in, there is an awful lot of paperwork, a massive amount. We didn't have [REDACTED] for months because of the paperwork, I don't know how much of that is down to waiting on external departments, immigration, or is it just the backlog, but it felt like there was always a hurdle and it would be like that for all our short-term assignments. With [REDACTED] with the visa piece, when we tried to extend hers, there is an awful lot of paperwork, we got there in the end. It would turn some groups off I would imagine and I have heard horror stories. That's a challenge.*

Line Manager C.

The pre-planning is key when it comes to trying to overcome these hurdles with paperwork and assignment start dates.

#### **4.6.3 Criteria Three: Knowledge Development, Transfer and Application**

In relation to the transfer of knowledge back to the home environment there was an example provided of such an outcome by one of the host country line managers in this study:

*Buy in from both groups is important, one negative that we have experienced was where the partner came from Bangalore, very strong, very ambitious, management in Bangalore probably saw it as a challenge cause the way he approached it was they do this in limerick, they do that in limerick, it is way better, we should do this, whereas another assignee who saw the exact same things was able to bring back and suggest improvements much more tactfully I suppose, she arranged meetings, she arranged WebEx's and got them involved – what do you think of this, what do you think of that – whereas he went back head first and that definitely created tensions, it was very sensitive in Bangalore, they thought we were forcing something through.*

Line Manager C.

In this instance different approaches to knowledge transfer by an assignee back to the home location resulted in either a positive or a negative outcome depending on the way the knowledge and processes were communicated back to the home environment.

#### **4.6.4 Criteria Four: Cultural Intelligence**

Of note, one line manager referred to the benefits of enhanced cultural intelligence arising from managing assignees from different cultures and the challenges therein; and the wider network it exposed her team to:

*For me personally the benefits have been massive purely because I managed people I would never have had exposure to before, one assignee [REDACTED] was a kind of stereotype of the Manila office, they're very bubbly, eager, they're very enthusiastic, the other assignee was the opposite, was quiet and found the office very quiet, so for me managing her was a challenge, then I built a relationship with her manager so that has been a big thing for us and that's across the group, we now know other managers in other locations, and you have to interact more with them for a number of different reasons for example time keeping and review documentation, we have a mid and end of year review, so I would have done both their reviews together with their manager in the Manila office, so that's an asset for me personally, I have learned so much more about their world and what their drivers are.*

Line Manager C.

In this instance, there were positive outcomes for both the host country line manager in terms of enhanced cultural exposure and global performance management and enhanced networking, and the assignees in terms of enhanced socialisation with other managers in other locations.

#### **4.6.5 Criteria Five: Social Capital**

Enhanced networks and resultant social capital are viewed as a positive outcome by the host country line manager:

*They can grow networks, the assignment opens up opportunities to help them to grow and expand their network, and that is something I would have been keen for her to do, and to get exposure to roles in fund accounting, to meet people, getting to know partners from different locations, especially Chicago, they would never have had an opportunity to do that in Bangalore as they were never on line at the same time.*

Line Manager C.

Being on assignment in this host location afforded the assignee the opportunity to build these networks which translated into social capital which is a key positive outcome from the assignment.

#### **4.6.6 Criteria Six: Development**

The development of the expatriate's skills is also outlined as a positive outcome from an international assignment:

*the company wants to make sure that each assignment is completed as a success and that the individual assignee so that they grow overall in their career and are ready and part of an overall development process for them.*

Line Manager B.

This is particularly important when expatriate outcomes are matched with family outcomes so that positive outcomes can be realised for both stakes to promote a win-win scenario:

*The company have to make sure that they [the expatriate] develop and then when entire families are moving as a unit, the international assignment has to be neutral and positive for every individual.*

Line Manager B.

#### **4.6.7 Criteria Seven: Adjustment**

The adjustment of the expatriate on assignment is identified as a positive outcome. In this case, the line manager also had experience of undertaking an international assignment and saw the similarities common to assignment success:

*She is very happy, she loves the experience, she is living in Zurich, loves the experience, but she is a high performing at work person as well herself but just like me, she decided I want to live in an apartment in Zurich with a balcony. I know it sounds really simple but it's a huge factor you know that once you leave work, you can go home, you can relax in an environment that you are happy in, and you*

*recharge and you go and get up and get back into work then off you go again. I think a lot of people underestimate this.*

Line Manager A.

Another line manager noted the importance of synergistic support amongst assignees which facilitated a successful adjustment:

*They came both around the same time, they were living in the same apartments, and that definitely helped them both. Had they not had each other, it might have taken them longer to settle, they got to see the country, they did some tours together... I think that was definitely a factor, if they hadn't had each other as here in Limerick, we don't socialise outside of work, unless if someone was leaving, Christmas and that sort of thing.*

Line Manager C.

This synergistic support played a facilitative role in the adjustment of the assignees as there appeared to be challenges with getting to know and to socialise with host country nationals outside of the work environment.

#### **4.6.8 Criteria Eight: Performance**

For the line manager, the performance of the expatriate is of critical importance and is a critical outcome. It is the predominant preoccupation of a line manager.

*I am managing someone who we moved from the States to Switzerland and I have just extended her assignment, she is so happy over there and again it is all down to the same thing. Success as a line manager, first of all, let's face it at the end of the day in a work context, ██████ is the name of the girl that reports into me, for her 2017 rating was an exceeds, the only one in the entire procurement organisation and she is very happy, she loves the experience, she is living in Zurich, loves the experience, but she is a high performing at work person.*

Line Manager A.

Effective performance reviews and 'exceeds' performance ratings are viewed as the cornerstone of assignment success.

Assignment completion and career development were also viewed as effective performance by another line manager:

*If you look at it from an employer's point of view they have significant objectives, the company wants to make sure that each assignment is completed as a success and that the individual assignee so that they grow overall in their career and are ready and part of an overall development process for them.*

Line Manager B.

Of note, one line manager referred to the benefits of managing assignees from different cultures and the challenges therein; and the wider network it exposed her team to:

*For me personally the benefits have been massive purely because I managed people I would never have had exposure to before, one assignee [REDACTED] was a kind of stereotype of the Manila office, they're very bubbly, eager, they're very enthusiastic, the other assignee was the opposite, was quiet and found the office very quiet, so for me managing her was a challenge, then I built a relationship with her manager so that has been a big thing for us and that's across the group, we now know other managers in other locations, and you have to interact more with them for a number of different reasons for example time keeping and review documentation, we have a mid and end of year review, so I would have done both their reviews together with their manager in the Manila office, so that's an asset for me personally, I have learned so much more about their world and what their drivers are.*

Line Manager C.

Additionally, different EPM documentation and cultural styles in terms of receiving performance review feedback was described as challenging:

*She is excellent, a very strong performer, one issue I found was that their documentation was quite different to ours even though we are the same organisation, ours was ten pages, hers was 50 pages so mid-year I found that a little bit difficult, just a challenge, they have a very different style over there, we are very fact based, they are very emotion based so I think she would have found her mid-year review a little bit different. She probably had a bit of weariness around it, that can be a challenge. Her performance is excellent so it really wasn't an issue.*

Line Manager C.

Therefore, host country line managers need to be aware of the varying receptive levels to performance review feedback amongst assignment populations and structure feedback giving accordingly to allow for acceptance and action.

#### **4.6.9 Criteria Nine: Readiness (Motivation and Willingness)**

An interesting observation by one of the line managers in this study would indicate a view that there is less of a motive regarding undertaking an assignment for cultural accumulation and intelligence purposes due to advancements in English language skills, international education and communication technologies:

*With multinational relocation, there are other factors too so if you go back to the 80s there were a lot of international assignments that people had to do just for cultural accumulation, to learn to speak fluent English for example, understanding the way in which work is done and organised work and there is a lot less need for that now for a number of reasons as people are now much more educated in a globally oriented way. I don't know any engineers educated in the world who are unable to speak English. If you need an English speaking graduate you can find them anywhere to speak English. The ways in which the world operates and is governed and cultural exposure is much more universal, with telecommunications etc. you don't have to explain how things work in an organisation to the same extent that you might have done in the past.*

Line Manager B.

It further reiterates the fact that we are now operating in a global environment where international business travel and short-term assignments are sufficient mechanisms for global staffing.

#### **4.6.10 Criteria Ten: Timely Communication and Feedback**

Regular check-ins with assignees were identified as a key enabler to success:

*Planning is key, give right support, check in regularly, make the environment as welcoming as possible.*

Line Manager C.

Regular check-ins were deemed as necessary to facilitate the adjustment of the assignee as they socialised into the host location work environment.

#### **4.6.11 Criteria Eleven: Talent Management**

From a talent management perspective, one line manager raises the importance of diversity:

*From a company or manager point of view, diversity is much more embraced and much more valued. When I was starting off in my career, everybody was being taught to conform as a white middle aged middle class male, even if they weren't white or middle aged or middle class, taught to behave that way whereas now diversity is valued and you don't have to be so homogeneous or conforming that its perfectly acceptable for people to have cultural differences around the table. There's talent, new hire talent into organisations, it's coming in a lot more smoothly to function effectively in global organisations as a result of education and global telecommunications. And also the need to have everybody homogenised and conforming in a particular way isn't there anymore, diversity isn't only tolerated but celebrated.*

Line Manager B.

Evidently international assignments can facilitate diversity in international talent in an organisation.

#### **4.6.12 Criteria Twelve: Business Value and Return**

Another key outcome which was deemed a win-win was the value that the business garnered from the assignments in terms of enhanced interactions among teams and information sharing:

*The amount of interaction we have between the global groups is much greater than what it was 12 months ago, so we are able to pick up the phone, that's a massive benefit that is why we have kept up these short-term assignments, it creates a relationship that would not be there otherwise.*

*Again just allocating resources to our global model, that's an option now across the board, if something is being done in any location, we can say right could this sit*

*somewhere else, and we now have experienced partners that have been to other locations, we would have not had that before. So that's a big win for us.*

Line Manager C.

The views of the host country line manager on business value and return should ideally be socialised with the other salient stakeholders to promote individual and organisational alignment with regards to assignment success and returns.

#### 4.6.13 Summary

To conclude for the host country line manager the following table lists the enablers and outcomes as identified in the field research:

<b>The Host Country Line Manager Stakeholder</b>	
<b>Enablers</b>	<b>Outcomes</b>
Organisational Support	Career Capital
Readiness (Motivation and Willingness)	Knowledge Development, Transfer and Application
Cultural Intelligence	Cultural Intelligence
Timely Communication and Feedback	Social Capital
Talent Management	Development
	Adjustment
	Performance
	Business Value and Return

**Table 23: International assignment success enablers and outcomes for the host country line manager stakeholder.**

On further analysis applying the temporal perspective for the host country line manager stakeholder success criteria yields the following:

<b>Host Country Line Manager Success Criteria from a temporal perspective</b>		
<b>Pre</b>	<b>In</b>	<b>Post</b>
Readiness	Career Capital	Career Capital
	Organisational Support	Knowledge Stocks and Flows
	Cultural Intelligence	Social Capital
	Social Capital	
	Development	
	Adjustment	
	Performance	
	Timely Communication and Feedback	
	Talent Management	
	Business Value and Return	

**Table 24: A temporal perspective on the host country line manager stakeholder success criteria**

Based on the empirical evidence from the line manager stakeholders, applying a temporal perspective yields the following:

<b>Host Country Line Manager Success Criteria from a temporal perspective</b>					
<b>Pre</b>		<b>In</b>		<b>Post</b>	
<b>Enabler</b>	<b>Outcome</b>	<b>Enabler</b>	<b>Outcome</b>	<b>Enabler</b>	<b>Outcome</b>
Readiness		Organisational Support	Career Capital		Career Capital
		Timely Communication and Feedback	Social Capital		Knowledge Development, Transfer and Application
		Talent Management	Development		Social Capital
		Cultural Intelligence	Cultural Intelligence		
			Adjustment		
			Performance		
			Business Value and Return		

**Table 25: A temporal perspective on the host country line manager stakeholder success criteria enablers and outcomes.**

#### **4.7 SIGNIFICANCE AND CONTRIBUTIONS**

The findings demonstrate the many enablers and outcomes that contribute to assignment success across five proximal salient stakeholders in the global assignment cycle. To bring it all together, the below table lists the enablers and outcomes across the five stakeholder groups at the individual and organisational level.

Empirical Success Enablers and Outcomes	Stakeholder				
	<i>Expatriate</i>	<i>Repatriate</i>	<i>Global Mobility Function</i>	<i>HR Function</i>	<i>Line Manager (Host)</i>
	<i>Individual Level</i>		<i>Organisational Level</i>		
Career Capital (Outcome)	•	•	•		•
Organisational Support (Enabler)	•	•	•	•	•
Family (Enabler)	•	•	•	•	
Knowledge Development, Transfer & Application (Outcome)	•	•	•		•
Cultural Intelligence (Enabler & Outcome)	•	•	•	•	•
Host Country National Integration & Buy-in (Enabler & Outcome)	•	•	•		
Social Capital (Outcome)	•	•	•	•	•
Development (Outcome)	•	•	•	•	•
Adjustment (Outcome)	•	•	•	•	•
Performance (Outcome)	•	•	•	•	•
Personality (Enabler)	•	•		•	
Role Dimension (Outcome)	•	•			
Readiness (Motivation and Willingness) (Enabler)	•	•	•	•	•
Characteristics (Enabler)	•				
Previous International Experience (Enabler)	•	•	•		
Timely Communication & Feedback (Enabler)		•	•	•	•
Retention (Outcome)			•	•	
Talent Management (Enabler)			•	•	•
Line Manager Support (Enabler)	•	•			
Business Value and Return (Outcome)	•	•	•	•	•

**Table 26: A Stakeholder Classification of international assignment success.**

## **4.8 CONCLUSION**

To conclude a diverse range of criteria pinpoint success across the five proximal salient stakeholders. The next chapter will discuss in detail the relevance of the success criteria (outcomes and enablers) in the context of a framework that explicates assignment success at an individual and organisational level at the pre-, in- and post phases of an international assignment.

## CHAPTER 5: DISCUSSION

### 5.1 INTRODUCTION

In the preceding chapter, a detailed account of the outcomes and enablers of international assignment success were presented according to five proximal salient organisational stakeholders, namely the expatriate, the repatriate, the HR function, the global mobility function and the host location line manager. To build on our knowledge base, and further explicate the findings at an individual and organisational level, the enablers and outcomes will now be discussed at an individual and organisational level from a temporal perspective. A framework (Figure 1.) is presented which ties all the pieces together, namely the criteria enablers and outcomes at the individual and organisational level at the pre-, in-, and post assignment stages.

Figure 1: A Temporal Level View of International Assignment Success

Assignment Stage	Individual Level	Individual Level	Organisational Level	Organisational Level
	<u>Enabler</u>	<u>Outcome</u>	<u>Enabler</u>	<u>Outcome</u>
Pre	Organisational Support Family Dimension Readiness Personality Characteristics Previous international experience		Organisational Support Family Dimension Readiness Talent Management Previous International Experience	
In	Organisational Support Family Dimension Cultural Intelligence HCN integration and buy-in Personality Role Line Manager Support Timely Communication and Feedback	Career Capital Knowledge Cultural Intelligence HCN integration and buy-in Social Capital Development Adjustment Performance Business Value and Return	Organisational Support Cultural Intelligence Personality Timely Communication and Feedback Family Dimension HCN integration and buy-in Talent Management	Career Capital Cultural Intelligence HCN integration and buy-in Social Capital Development Adjustment Performance Business Value and Return
Post	Organisational Support Line Manager Support	Career Capital Knowledge Social Capital Adjustment	Organisational Support Timely Communication and Feedback Talent Management	Career Capital Knowledge Development      Social Capital Business Value and Return Retention

## 5.2 PRE-ASSIGNMENT INDIVIDUAL AND ORGANISATIONAL LEVELS

At the pre-assignment stage there are a number of enablers that are key to success across the individual and organisational levels. The individual level yields organisational support, the family dimension, readiness, personality, characteristics and previous international experience, whilst similarly the organisational level yields commonalities such as organisational support, the family dimension, readiness and previous international experience, whilst talent management represents a different enabler. Personality and expatriate characteristics represent unique enablers on the individual side.

### 5.2.1 Organisational support

Organisational Support is a key enabler for international assignment success in the pre-assignment stage and this was echoed by all five stakeholders. Both formal and informal support forms were welcomed, particularly by expatriates and line managers. How the expatriate perceives the adequacy of support provided to them is an important parameter (Lazarova *et al.* 2015). The investment in a preview trip would be a policy initiative that was welcomed by all the stakeholders in terms of preparing the expatriate for the assignment. Assistance with paperwork was also welcomed as it can be overwhelming, particularly with regard to tax and immigration issues.

Another important feature of preparation in the pre-assignment stage would be safety and security training which is essential for expatriates in more high risk and terrorism endangered locations (Bader and Berg 2014).

Another way to facilitate adjustment and success would be to use the existing network of assignees in an organisation as mobility advocates and use their advice to help assignees

make up their mind with regard to undertaking an assignment. Concomitantly, this would help raise the profile of a mobility brand in the organisation.

### **5.2.2 Family Dimension**

The role of the family as both an enabler and a disabler was echoed by all stakeholders with the exception of the line manager. Family can be a leading reason for not undertaking an international assignment because of the unsettling nature of an international move especially when there are children and teenagers involved. Family issues dominate the reasons for international assignment refusal with family concerns (38%) and spouse/partner career issues (18%) accounting for the top two reasons for international assignment refusal (Brookfield 2016). The impact on the trailing partner and spouse, particularly if it results in a loss of spousal income and a stall on the partner/ spouse career trajectory should not be underestimated. More supports are required for the family when involved in an international move, and they should be recognised as a salient stakeholder in this regard (Lämsä, Heikkinen, Smith and Tornikoski 2017).

### **5.2.3 Readiness**

Readiness (motivation and willingness) was perceived as an enabler to success by all five stakeholder cohorts. Additionally, self-efficacy, which represents the expatriate's belief in his/her capability to complete the assignment is important (Varma *et al.* 2011). There can be positives realized when there is alignment between the individual assignee and the organisation in terms of readiness and need. This fit and alignment argument was echoed by HR and global mobility.

HR have a pivotal role to play in facilitating international assignments and expatriate readiness to ensure a positive outcome for all involved by giving a realistic preview to the

assignee, whether it is arranging a preview trip or putting the potential assignee in touch with expatriates who have already undertaken an assignment to the respective host location. Such an initiative could promote the value of global mobility to the organisation. This could further promote alignment at the individual and organisational level. Interestingly, managing expectations is key in the pre-assignment stage as the expatriate would be sensitive to changes in the psychological contract (Guzzo *et al.* 1994) and mismanagement could result in psychological contract breach prompting exit (Sherman and Morley 2015, 2018).

#### **5.2.4 Personality**

Personality is perceived as an enabler to assignment success at the individual and organisational level in the pre-assignment stage. Three of the stakeholder groups, the expatriate, the repatriate and the HR function regard it as an enabler. The global mobility function and the line manager do not regard it as so.

#### **5.2.5 Characteristics**

Characteristics of the expatriate population were perceived as an important enabler to success. This could be the life stage at which they are at and an assignment may not be appropriate at that time due to family circumstances. It was not perceived as important by the repatriate, the global mobility function, HR or the line manager.

#### **5.2.6 Previous International Experience**

Previous international experience was perceived as an enabler of assignment success by the expatriate, the repatriate and the global mobility function cohort. It was not perceived as important by the HR function or the line manager. Having spent time abroad, be it in the capacity of international schooling or a previous assignment, proved beneficial for assignment success.

### **5.2.7 Talent Management**

Talent Management is perceived as a positive enabler at the organisational level by the salient organisational stakeholders. For HR the overreliance of assignees as opposed to the use of local hires was also highlighted, and one solution proposed was the use of a global talent pool. Having the correct match in your pool should result in a better assignment fit to match both individual and organisational needs thus promoting individual and organisational alignment. For global mobility, talent management and the effective deployment and management of an international talent pipeline is perceived as an important enabler. These arguments resonate with recent calls in the literature calling for the coupling of global mobility and global talent management and a closer link between global mobility returns and success and global talent management (Caligiuri and Bonache 2016; Cerdin and Brewster 2014; Collings 2014; McNulty and De Cieri 2016).

Subsumed in this argument is diversity and the inclusion of non-traditional assignees in the talent mix. International assignments are perceived as pivotal for effective talent management. The line manager raises the importance of diversity and how international assignments can facilitate diversity in international talent, which PwC (2015, p. 3) identify as a key priority in the realm of talent management: “Talent diversity and inclusiveness is no longer seen as a soft issue. It’s now a core component of competitiveness – and most CEOs (77%) have, or intend to adopt, a strategy that promotes it” p. 3.

### 5.3 IN-ASSIGNMENT INDIVIDUAL AND ORGANISATIONAL LEVELS

At the in-assignment stage there are a number of enablers that are key to success across the individual and organisational levels. The individual level yields organisational support, the family dimension, cultural intelligence, HCN integration and buy-in, personality, role dimension, line manager support, and timely communication and feedback, whilst similarly the organisational level yields organisational support, cultural intelligence, personality, timely communication and feedback, the family dimension, HCN integration and buy-in, and talent management.

#### 5.3.1 Organisation Support

Organisational support is a key enabler for international assignment success and this was echoed by all five stakeholders at the individual and organisational level for the in-assignment stage.

Regarding cross-cultural training, while it was welcomed and perceived as useful in most cases, there was evidence to suggest that its impact was questionable as it did not target cultural issues and adjustment in the work environment. This resonates with the mixed results of some prior studies with regard to the effectiveness of CCT (Morris and Robie, 2001; Puck, Kittler, and Wright 2008; Qin and Baruch 2010). One global mobility manager believed that the real cross-cultural training happened when the expatriate was on the ground in the host location and the impact of this on the ground was perceived as far more superior to an on-line cross-cultural training module that was available to its assignee base. Safety and security training which is essential for expatriates in more high risk and terrorism endangered locations (Bader and Berg 2014) was welcomed by all expatriates on assignment, particularly in South Africa.

One issue of note that was proposed by a HR stakeholder at the organisational level regarding financial support on assignment was the negative impact of localized plus expatriates with fewer allowances versus the traditional expatriate with their enhanced allowances as such reductions may have an adverse impact on the motivation and loyalty of expatriates (McNulty and Aldred 2013; McNulty *et al* 2013).

### **5.3.2 Family Dimension**

The role of the family as both an enabler and a disabler whilst on assignment was echoed by all stakeholders with the exception of the host country line manager. The impact on the trailing partner and spouse, particularly if it results in a loss of spousal income and a stall on the partner/ spouse career trajectory should not be underestimated. Given the impact of family (mal)adjustment on the (mal) adjustment of the expatriate more supports are required for the family on assignment, and additionally they should be recognised as a salient stakeholder in this regard (Lämsä, Heikkinen, Smith and Tornikoski 2017).

The skillset of the successful mobile family was identified in this research, namely the existence of strong relationships, open communication and willingness to adapt to change and this correlates with research by Lazarova *et al.* (2015). While moving as a single person was considered easier, there were also positives cited for moving as a couple to ensure a smooth adjustment and success. This is related to research from Van Erp *et al.* (2014) who found evidence of a spillover in terms of a compensatory process whereby one partner's lack of sufficiently high levels of a certain personality trait is compensated for by the other partner's high(er) levels of these traits. Through this resource compensation effect, the negative consequences of lower levels of a personality trait on adjustment can be diminished.

### **5.3.3 Cultural Intelligence (CQ)**

Cultural intelligence (CQ) was listed as both an enabler and an outcome of assignment success by all stakeholders. Ang *et al.* 2007, p. 337 define CQ as “an individual’s capability to function and manage effectively in culturally diverse settings”. The stakeholder cohorts were resolute in regarding cultural intelligence as central in exposing them to many cultures and facilitating adjustment and questioning why things work or don’t work in a location. One interesting coined phrase by an expatriate was the importance of living in harmony with other cultures in order to facilitate adjustment, performance and assignment success. This would appear to corroborate studies that would have found a positive relationship between CQ and job performance (e.g., Lee and Sukoco 2010; Sri Ramalu, Che Rose, Uli and Kumar 2012) and CQ and cross-cultural adjustment (Lee and Kartika 2014; Sri Ramalu *et al.* 2012; Sri Ramalu, Wei and Che Rose 2011).

### **5.3.4 Host Country National Integration and Buy-In**

Similarly, host country national integration and buy-in was perceived as an enabler and an outcome of international assignment success at the individual level by the expatriate and the repatriate, and at the organisational level by the global mobility function stakeholder. It wasn’t perceived as a success criteria by HR and the line manager. The expatriate stakeholder was particularly insistent that integration with host country nationals and attaining their buy in was capable of making or breaking the assignment. However, due to host country location characteristics this was not always possible. In terror endangered and high risk countries, it would be quite difficult to form relationships and friendships outside the work environment (Bader and Berg 2013, 2014; Bader, Berg and Holtbrügge 2015). Many expatriates stay within the expatriate bubble and don’t integrate with locals.

Surprisingly, the literature is rather silent with regard to the role of host country nationals (HCNs) in facilitating expatriate performance including locals' role in the performance appraisal process (Foldes, Ones, and Sinangil 2006). Whilst the HCN socialisation literature has referred to the existence of a perceived inequity between home and host employees, and the negative impact that this can have in relation to expatriate relationships with employees in the host location, particularly in relation to compensation parities (Paik, Praveen Parboteeah and Shim 2007; Toh and DeNisi 2007), however, there was no evidence of this in this research project.

Interest in the host environment has gained prominence in recent years specifically in the two key areas of perceived compensation inequity and HCNs as socializing agents (Caligiuri and Bonache 2016; Pichler, Varma and Budhwar 2012; Sonesh and DeNisi 2016; Toh and DeNisi 2007). Indeed, the quality of the relationship between the international assignee and the local employees (HCNs) is critical (DeNisi and Sonesh 2016, p. 390). Research has examined the salary gap between host nationals and expatriate employees (Chen, Choi, and Chi 2002; Toh and DeNisi 2003) and the role HCNs play as socializing agents, sources of social support, and providing assistance for expatriates (Mahajan and Toh 2014; Toh and DeNisi 2007). Without local support, expatriates may experience greater difficulty acclimatizing to their new job and working environment, which can impact on their performance. Hence, it is appropriate to hold the view that HCN integration can make or break an assignment.

### **5.3.5 Personality**

Personality is perceived as an enabler to assignment success at the individual and organisational levels of analysis during the in-assignment phase. Three of the stakeholder groups, the expatriate, the repatriate and the HR function regard it as an enabler. The global

mobility function and the line manager do not regard it as so. While it has been purported that certain personality traits are precursors to ensuring success, core traits that were cited by the three cohorts above included openness, ability to manage change, being resilient and possessing good communication skills, being independent and ambitious as the whole experience can be overwhelming, and some are shared in common with scholarly work by Caligiuri's (2000) 'Big Five' personality characteristics (Extroversion, Agreeableness, Conscientiousness, Emotional Stability, and Openness or Intellect).

### **5.3.6 Role Dimensions**

Role dimensions relative to the role undertaken on assignment were cited as both positive and negative enablers by both the expatriate and repatriate cohort at the individual level. It was not viewed as important at the organisational level. Positively, job satisfaction would be a key outcome for the expatriate, there were negative outcomes also cited whereby the assignment role was perceived as a demotion, from director to manager level, with manager levels in the host location not afforded the opportunity to engage with customers as this would have been a director level remit. Instances of expatriates being overqualified and underemployed has previously been reported in the literature (Bolino and Feldman 2000; Bossard and Peterson 2005).

### **5.3.7 Line Manager Support**

Line Manager Support was perceived as an enabler of assignment success by the expatriate and repatriate stakeholders at the individual level, with the remaining stakeholder cohorts at organisational level not believing so. For the expatriate the location and the proximity of the line manager can make a difference. The role of the line manager and support particularly when managing someone in the repatriation phase can be impactful. Line manager capability and cultural differences can affect support and management perceptions. Extant literature

would indicate that the home line manager would have a larger impact on expatriate career and development outcomes, whilst the host line manager would be more concerned with adjustment and withdrawal (Benson and Pattie 2009; Pattie *et al.* 2013).

### **5.3.8 Timely Communication and feedback**

Timely communication and feedback was perceived as an enabler at the individual and organisational level with the exception of the expatriate at the individual level. The value in having regular check-ins while on assignment was viewed as being beneficial and providing value, ensuring expatriate retention and preventing exit.

### **5.3.9 Talent Management**

Talent Management is perceived as a positive enabler solely at the organisational level with HR stakeholder propagating the establishment of a global talent pool to promote assignment fit and individual and organisational alignment, thus creating an environment conducive to international assignment success. For global mobility, talent management and the effective deployment and management of an international talent pipeline is perceived as an important enabler.

### **5.3.10 Outcomes at the In-Assignment Phase**

At the individual level during this phase, the outcomes are career capital, knowledge development, transfer and application, cultural intelligence, HCN integration and buy-in, social capital, development, adjustment, performance, and business value and return. At the organisational level, the outcomes are career capital, cultural intelligence, HCN integration and buy-in, social capital, development, adjustment, performance, and business value and return. The one discerning criteria being the knowledge development, transfer and application.

### **5.3.11 Career Capital**

Career Capital as an outcome was a predominant theme that was raised repeatedly at the individual and organisational level by the relevant stakeholders, by the expatriate, the repatriate, the global mobility function and the line manager. Rather surprisingly, it did not explicitly feature for HR participants in this research. On further inspection it appears that HR placed an overarching emphasis on development and retention. Extant literature repeatedly refers to career capital accumulation as a key outcome for undertaking an international assignment (Dickmann and Harris 2005). However, studies often report mixed results on career capital accumulation and career progression with the current employer (Benson and Pattie, 2008; McNulty and De Cieri, 2016). The findings in this study would appear to indicate an overwhelmingly positive impact of career capital. However, there is a recognition particularly on the part of expatriates that if this career capital is not recognised or if their career stagnates, expatriates will look at alternative opportunities.

For the organisation, this career capital can be translated into organisational capabilities (Haslberger and Brewster 2009).

### **5.3.12 Knowledge Development, Transfer and Application**

Knowledge development, transfer and application was perceived as a positive outcome for all stakeholders in this research with the exception of the HR function. Increases in organisational knowledge can result from an international assignment (Boyacigiller 2000) such as knowledge of global markets, global manager competency development, culture and capability transfer and development. This would resonate with the view of the global mobility function in this research who regard expatriates as involved in the cross-contamination of knowledge around the subsidiaries.

### **5.3.13 Social Capital**

Nahapiet and Ghoshal (1998, p. 243) define social capital as “the sum of actual and potential resources embedded within, available through, and derived from the network of relationships possessed by an individual or social unit. Social capital thus comprises both the network and the assets that may be mobilized through that network”. Social Capital and the networks built in the work and non-work environment were regarded as a positive outcome from an international assignment by all the stakeholders in this research. The socialisation role of local employees, who assist in the expatriate adjustment process, cannot be underestimated (Malek *et al.* 2015; Toh and DeNisi 2005, van Bakel 2019; van Bakel, van Oudenhoven and Gerritsen 2017). Indeed, the host location characteristics can also hinder the development of social capital.

The importance of maintaining home networks was also identified as it can act as a stabilizing mechanism, particularly for the expatriate. Social capital as an outcome for global mobility and the line manager tends to focus on the benefits within the work environment of creating networks that facilitate knowledge transfer (Raider and Burt 1996).

Expatriates who have more network ties in their social networks tend to receive more social support, and therefore feel more acclimatised (Li, Wang and Rothstein 2010). Despite making impressive advances, the social network perspective is characterised by contradictory findings (Bhaskar-Shrinivas *et al.* 2005; Liu and Shaffer 2005; Osman-Gani and Rockstuhl, 2008). Bruning, Sonpar and Wang (2012) discovered higher network ties with HCN colleagues are positively associated with performance, but however are negatively associated with adjustment. There is a need to examine work and non-work domains when it comes to local support networks as different types of host country ties may differentially impact on adjustment and performance.

#### **5.3.14 Development**

The development of the expatriate and repatriate is perceived as a positive outcome for all stakeholders. It featured as a predominant outcome across all stakeholders and was viewed as both professional and personal development and leadership development. Additionally, it is an outcome that can be viewed and take many guises e.g. travel and learning languages, visibility and access to the senior management team. Competency and skill development is key and it is closely related to career development. Whilst no formal mentoring programmes designed for expatriates were in evidence, participants sought out a mentor and saw benefits with such a programme. Mentoring has received increased attention as an instrument to facilitate assignee retention and long-term career development (Carraher et al. 2008; Mezias and Scandura 2005).

#### **5.3.15 Adjustment**

Adjustment was perceived as a positive outcome by all the stakeholders. It required effort and going beyond the comfort zone on the part of the stakeholders to adjust in a work and non-work environment. The home environment surroundings were considered pivotal i.e. where they lived impacted on their happiness and adjustment, and their expectations matched reality in terms of accommodation available. Synergistic support in the form of assignees being there for each other and aiding each other's adjustment was identified by the line manager as an enabler to success.

#### **5.3.16 Performance**

Similarly, performance is perceived as a positive outcome by the five stakeholder groups at the individual and organisational level in this research. Effective performance can be regarded under the auspices of achievement of assignment goals and objectives as defined prior to the assignment and upon completion of the assignment. The expatriates in this study were reviewed

in the context of a global performance management system and not a customized approach. HR tends to focus on the achievement of assignment objectives. Interestingly, one global mobility manager referred to the strategic intent of an assignment which is closely linked to the expatriate performance management (EPM) system in terms of goals and objectives, succession planning and the talent pipeline. From a line manager perspective, in addition to achievement of goals and objectives, another perceived positive outcome of the EPM system was the exposure to managing assignees from multi-cultural backgrounds.

### **5.3.17 Business Value and Return**

Business value and return was perceived as a positive outcome at all levels in this research. The expatriate wants to add value as he/she is aware of the cost and the investment that the company is placing in them. The expatriate wants to implement work process improvements in the host location and come away from the assignment as having made a difference. The repatriate perceives the return that the business gained from the assignment as a positive outcome, particularly in the product knowledge and customer knowledge development sphere.

The value that the business can reap from an international assignment should be considered but unfortunately it isn't always on the agenda in HR. HR should promote moves, and make as many of them happen as possible. The global mobility function perceives process improvements, networking, building relationships and transferring knowledge across the business as important outcomes. For the host country line manager, interaction globally across teams, and the ability to allocate resources globally are key for effective business value and talent management.

## 5.4 POST-ASSIGNMENT INDIVIDUAL AND ORGANISATIONAL LEVELS

At the post-assignment stage there are a number of enablers that are key to success across the individual and organisational levels. The individual level yields organisational support and line manager support, whilst the organisational level yields organisational support, timely communication and feedback and talent management.

### 5.4.1 Organisational Support

Organisational Support is a key enabler for international assignment success and this was echoed by all five stakeholders at the individual and organisational level.

Particularly in the post assignment phase, repatriation and re-integration support and career support are also essential to prevent exit upon return to the home environment. In addition, the organisation needs to take advantage of the repatriate's knowledge and skills acquired whilst abroad to maximise the return from the international assignment.

### 5.4.2 Line Manager Support

Line Manager Support was perceived as an enabler of assignment success at the individual level by the expatriate and repatriate stakeholders. The role of the line manager and support particularly when managing someone in the repatriation phase can be impactful. Line manager capability and cultural differences can affect support and management perceptions. Extant literature would indicate that the home line manager would have a larger impact on expatriate career and development outcomes, whilst the host line manager would be more concerned with adjustment and withdrawal (Benson and Pattie 2009; Pattie *et al.* 2013).

### 5.4.3 Timely Communication and Feedback

Timely communication and feedback was perceived as an enabler by all stakeholders with the exception of the expatriate. It is of particular importance in the lead up to an assignee repatriating. Ideally, this lead in time should be six months or more. Generally, global

mobility would have a repatriation briefing with the assignee before they return to the home organisation and while this provides a medium to acquire feedback on the assignment, ideally feedback should be sought on a more regular basis and this feedback should be documented for measurement purposes.

#### **5.4.4 Talent Management**

Talent Management is perceived as a positive enabler by all the organisational stakeholders at the post assignment stage. For global mobility, talent management and the effective deployment and management of an international talent pipeline is perceived as an important enabler; as one global mobility manager coined it that ultimately global mobility is about career and talent management and development.

#### **5.4.5 Outcomes at the Post-Assignment Phase**

The outcomes at the post-assignment stage at the individual level are perceived as career capital, knowledge development, transfer and application, social capital, and adjustment, whilst the organisational level yields career capital, knowledge development, transfer and application, social capital, development, business value and return, and retention.

#### **5.4.6 Career capital**

Career Capital as an outcome was a predominant theme that was raised repeatedly at the individual and organisational levels. Extant literature repeatedly refers to career capital accumulation as a key outcome from undertaking an international assignment (Dickmann and Harris 2005). However, studies often report mixed results on career capital accumulation and career progression with the current employer (Benson and Pattie, 2008; McNulty and De Cieri, 2016). The findings in this study would appear to indicate an overwhelmingly positive impact of career capital. However, there is a recognition particularly on the part of expatriates

that if this career capital is not recognised or if their career stagnates, expatriates will look at alternative opportunities.

For the organisation, this career capital can be translated into organisational capabilities (Haslberger and Brewster 2009). Hence, it is imperative and encouraged that the organisation support repatriates on their return to their home environment to ensure retention in order to reap the benefits of the international experience and the global mobility function recognise this.

#### **5.4.7 Knowledge development, transfer and application**

Knowledge development, transfer and application was perceived as a positive outcome for all stakeholders in this research with the exception of the HR function. Knowledge appeared to be more salient for the repatriate population in comparison to the expatriate population. This may not be surprising given debates in the expatriation literature on repatriate exit as a result of not being able to apply or given the opportunity to apply the knowledge gained on assignment and the associated loss of competitive advantage (Newton, Hutchings, and Kabanoff 2007; Tsang 1999).

Increases in organisational knowledge can result from an international assignment (Boyacigiller 2000) such as knowledge of global markets, global manager competency development, culture and capability transfer and development. This would resonate with the view of the global mobility function in this research who regard expatriates as involved in the cross-contamination of knowledge around the subsidiaries.

#### **5.4.8 Social capital**

Social Capital and the networks built in the work and non-work environment were regarded as a positive outcome from an international assignment by all the stakeholders in this research at the individual and organisational level. An interesting observation made by one of the

repatriate stakeholders in the post assignment phase related to the transient nature of networks developed by serial expatriates as they have to turn around their network every time they move, it is almost as if they are living in a subset of society.

#### **5.4.9 Adjustment**

Adjustment was perceived as a positive outcome at the individual level in the post assignment phase. Interestingly, one repatriate described her adjustment back into the home environment as akin to a feeling of ‘remorse’ which signifies how unsettling repatriation can be. Scholars have referred to a period of disillusionment and derailment to capture this (Borstorff *et al.* 1997) and if this is not managed correctly, could result in exit.

#### **5.4.10 Development**

The development of the expatriate and repatriate is perceived as a positive outcome for all stakeholders. It featured as a predominant outcome across all stakeholders and was viewed as both professional and personal development and leadership development. Additionally, it is an outcome that can be viewed and take many guises e.g. travel and learning languages, visibility and access to the senior management team. Competency and skill development is key and it is closely related to career development.

#### **5.4.11 Business value and return**

Business value and return was perceived as a positive outcome by all the stakeholders in this research. The repatriate perceives the return that the business gained from the assignment as a positive outcome, particularly in the product knowledge and customer knowledge development sphere. The value that the business can reap from an international assignment

should be considered but unfortunately it isn't always on the agenda in HR. HR should promote moves, and make as many of them happen as possible.

#### **5.4.12 Retention**

Retention was perceived as a positive outcome by the global mobility and HR function at the organisational level. Retention of the expatriate and repatriate is important, especially in light of the dangers of exit of assignees during or post an assignment. One global mobility view expressed would be to use international assignments as a retention tool as employees may view an assignment as being beneficial for their career within the organisation rather than exiting.

### **5.5 CONCLUSION**

To conclude, this chapter has presented at an individual and organisational level a discussion of the success criteria for all the five stakeholders and what it means to them in terms of success from a temporal perspective. Now the production site of knowledge (Kvale and Brinkmann 2009) has a building therein, namely a multi-level stakeholder view of international assignment success. Some final thoughts and contributions are presented in the last chapter to conclude this research thesis.

## CHAPTER 6: CONCLUSION

### 6.1 INTRODUCTION

This chapter concludes this study with a summary of the main findings as they contribute theoretically and empirically to our knowledge of international assignment success. Some limitations of the research and suggestions for future research are also highlighted.

Additionally, personal learnings and reflections are noted.

### 6.2 ASSIGNMENT SUCCESS AND STAKEHOLDERS

The research study aimed to clarify the proximal salient organisational stakeholders in expatriation and the different success criteria important to this salient set. The commonalities and differences across the stakeholders were also identified. The enablers of success as well as the outcomes were identified. A multi-level theoretical framework to explicate international assignment success enablers and outcomes from the perspective of five proximal salient stakeholders at the individual and organisational level has emerged.

Referring back to the research questions and how they have been addressed, I would like to examine the first research question concerning the identification of the proximal salient organisational stakeholders in the international assignment cycle:

Q1. Drawing on the stakeholder salience model (Mitchell, Agle and Wood 1997), who are the proximal salient organisational stakeholders in the international assignment cycle?

Work by scholars Driscoll and Starik (2004) introducing the attribute of proximity in the stakeholder salience relationship provides a platform to identify the proximal salient stakeholders in the organisation with regard to the international assignment cycle. The

expatriate, the repatriate, the HR function and the global mobility function and the host country line manager are highly salient organisational stakeholders who have a stake in the international assignment cycle and are discussed in this thesis. A framework table is put forward that can be built upon to include additional stakeholders mapping out their power, legitimacy, urgency and proximity attributes.

I recognise that there are other more distal stakeholders that could be included in future research for example the home country line manager, senior managers in the organisation who may be involved in mobility decisions, the family of the expatriate and repatriate, and other assignment types. Future research incorporating these additional stakeholders is encouraged.

The second question revolved around the success criteria:

Q2. (a) What does success mean for proximal salient organisational stakeholders in the international assignment cycle? What are the success criteria for proximal salient organisational stakeholders?

(b) Do success criteria differ for different stakeholders?

This question has been addressed as the relevant success criteria for each stakeholder has been clearly articulated and outlined and these have been transposed into a framework at the individual and organisational level, and subsequently categorised from an enabler and outcome categorisation and a temporal perspective of the pre-, in- and post-assignment phases.

Thirdly, the third research question was as follows:

Q3. What are the convergent and divergent success criteria for each salient stakeholder?;

To address this question areas of commonality and difference have been highlighted amongst the stakeholder cohorts.

With regard to the success criteria, career capital as an outcome was important to all stakeholders with the exception of the HR function. Perceived organisational support was important to all stakeholders as an enabler of success. Whilst the family was not a stakeholder that was the focus of this research, the family dimension, however, was highlighted by all with the exception of the host country line manager, as a success enabler. Knowledge development, transfer and application was deemed an important outcome by all with the exception of the HR function. Cultural intelligence was important to all as both an enabler and outcome. Host country national integration and buy-in was important to all as both an enabler and outcome except for HR and the host country line manager.

The outcome criteria of social capital, development, adjustment, performance and the enabler readiness were deemed important success criteria by all the stakeholders. Personality was an important enabler to all except global mobility and the host country line manager. The role dimension outcome was a concern for the expatriate and repatriate only at the individual level. Characteristics as an enabler emerged only for the expatriate population. Previous international experience as an enabler was important for all except HR and the host country line manager. Timely communication and feedback as an enabler was important for all except the expatriate. Retention as a positive outcome was exclusive to HR and global mobility. Surprisingly, it did not feature for the host country line manager. Talent management as an enabler was important for all the organisational level stakeholders – i.e. HR, global mobility and the host country line manager. Line manager support was identified exclusively at the individual level as an enabler by the expatriate and repatriate. Business value and return emerged as being an important success criteria outcome by all the stakeholders at the individual and organisational level.

Interestingly, role dimension, characteristics and line manager support emerged as unique outcome and enablers at the individual (expatriate and repatriate) level, whilst at the organisational level (HR function, global mobility function, and host country line manager), retention and talent management emerged as a unique outcome and enabler respectively.

### **6.3 CONTRIBUTION OF THE STUDY**

The contribution of this research lies threefold from a theoretical, an empirical and a practical perspective. Theoretically a model explicating international assignment success from the perspective of five proximal salient organisational stakeholders has emerged in this research. Empirically, it further extends our knowledge of assignment success and incorporates multi-stakeholder perceptions of this phenomenon, heretofore for which the global mobility literature has been rather silent. In particular the host country line manager stakeholder and the global mobility function stakeholder are given voice. A deeper understanding of the commonalities and differences across the stakeholder groups at an individual and organisational level emanates. Additionally, a dichotomous lens of the enabler of success and the outcome advances our understanding of this important phenomenon. Evidence has emerged of the coupling of global mobility and global talent management outcomes (McNulty and De Cieri 2016).

Taking all of these enablers and outcomes at the individual (expatriate and repatriate), and organisational (global mobility function, HR, the host country line manager) level, and the pre-, in- and post stages of an assignment, a model (see Figure 1) emerges which elucidates assignment success from a proximal multi-stakeholder, temporal and level perspective.

These represent a series of contributions to research, Firstly, the multi-stakeholder perspective and the identification of the proximal salient stakeholders and the examination of

their success perceptions represents a significant contribution to literature as it builds on the work of Al Ariss (2014), Hemmasi *et al.* (2010), Malek *et al.* (2015), Miao *et al.* (2011) and Takeuchi (2010). Whilst the stakeholder salience model (Mitchell *et al.* 1997) has been applied in previous research calling for the identification and importance of the salience of the family as a legitimate stakeholder in the international assignment cycle (Lämsä *et al.* 2015), this research adds to our knowledge as it identifies the power, legitimacy and urgency and proximal nature of key stakeholders in the international assignment cycle. It provides a framework template table (see table 2) that can be built upon to include additional stakeholders mapping out their power, legitimacy, urgency and proximity attributes to clarify the nature of their salience to the international assignment cycle.

Another powerful contribution, which emanated from the narratives of the proximal salient stakeholders in this research was the identification and unearthing of the dichotomous lens of enablers and outcomes of success. To further clarify this and build on its importance, the temporal dimension is introduced to identify the relevant success criteria by stakeholder at the pre-, in-, and post-assignment phases. Having a detailed list of enablers and outcomes at each phase by stakeholder provides global mobility policy makers with a comprehensive listing of what criteria are important at each phase of the global assignment cycle. Such a pertinent listing allows for greater knowledge of international assignment success and adds a valuable prism through which to view assignment success.

Conducting a comprehensive systematic literature review of international assignment success confirmed the proliferation of terms concerning success in extant literature. It was evident from the systematic literature review that there are a diversity of perceptions as success has been conceptualised in different ways under the umbrella of ‘performance’; ‘effectiveness’; ‘cost’; ‘ROI’, ‘success’ and ‘failure’. The identification of success criteria and the subsequent mapping of the success criteria to proximal salient organisational stakeholders represents a

contribution to global mobility research. Whilst five stakeholders were chosen, this systematic literature review methodology can be extended and applied to map other stakeholders' success perceptions, who are involved in the international assignment cycle, such as short-term assignees, the family unit – trailing partner/spouse/children/teenagers-, host country nationals, senior managers involved in talent management decisions, home country line managers, external third party relocation vendors (e.g. Cartus, Crowne), and tax partners (e.g. Deloitte, KPMG, Price Waterhouse Coopers) who assist assignees with paperwork and tax documentation obligations.

Comparing and mapping back the criteria from the empirical research to the systematic literature review success criteria yields a number of similarities and some variations and some surprising omissions. With regard to the fifteen success criteria from the SLR, the following were similarly in evidence in the empirical fieldwork stage: expatriate performance, expatriate adjustment, expatriate readiness, expatriate personality, expatriate competencies and skills, cultural intelligence (CQ), previous international experience, perceived organisational support (POS), career capital, knowledge stocks and flows, family dimensions including work-family conflict, social capital, and host country dimensions.

Surprisingly, selection techniques and the psychological contract did not emerge as success criteria in the fieldwork stage. Given the importance of the psychological contract for the expatriate population and the on-going danger of psychological contract breach perspectives given their exposure to changing terms and conditions, adjusting and coping in different host environments, and at different temporal stages, it was surprising that this criteria did not surface, particularly when it has been described as the “biggest differentiator for organisations wanting to obtain a satisfactory eROI” (McNulty and Inkson 2013, p. 104).

Additional success criteria that were unearthed in the fieldwork stage but did not emerge in the SLR were business value and return, role dimension, characteristics, timely communication and feedback, retention, talent management and line manager support. Fusing the two, the SLR and the empirical findings, paints a comprehensive picture of assignment success.

This research builds on the empirical work of DeNisi and Sonesh (2016), Hemmasi *et al.* (2010) and McNulty *et al.* (2009) on the measurement of international assignment success and return on investment in organisations who utilise international assignees as a global staffing option. The temporal dimension provides an extra layer of knowledge contribution.

Success is ultimately a multi-dimensional concept with a vast array of success criteria enablers and outcomes at each temporal stage of the assignment. One overall universal term cannot define it, as success can mean both similar and different aspects according to the salient stakeholders. Additionally, it responds to calls in the literature to incorporate multi-stakeholder viewpoints in expatriation research (Doherty and Dickmann 2012; Takeuchi 2010) and indeed in HR research (Beer *et al.* 2015; Dipboye 2007). Incorporating the stakeholder viewpoint moves us away from over “reliance on a comfortable paradigm and well-worn road” of expatriate-centric experiences (Harrison *et al.* 2004). This research has examined additional proximal stakeholders salient to the global assignment cycle both individually and cumulatively to build a picture of success.

Further from a practical and engaged scholarship perspective, it is envisaged that this research should assist in the formulation of global mobility policy as it contributes to the understanding of success according to salient actors in global mobility and hence should appeal to global mobility and global talent management practitioners.

## **6.4 LIMITATIONS**

There are however a series of limitations with regard to this research. Gaining access to the stakeholder sets proved difficult in an Irish context, owing in a large part to the location of global mobility functions predominantly in the USA. It also proved a challenge to obtain line managers of expatriates, possibly owing to the demands and constraints of everyday management in organisations. Whilst the sample size is small, the interviews provided rich accounts and rich data to illustrate the meaning of success. Five stakeholder groups were examined and there are a suite of other stakeholders that should be examined to extend this research. Incorporating such multi-stakeholders views is to be encouraged. International assignment success has been, and will continue to be an important and relevant topic in the human resource management and global mobility literature. There are significant opportunities ahead for gaining a deeper understanding of assignment success. Extending scholarship to map additional types of assignees (Kang, Shen and Benson 2017), including self-initiated expatriates as stakeholders (Al Ariss and Crowley-Henry 2013; Doherty 2013) and non-traditional assignees (McNulty and Hutchings 2016) could also prove fruitful, as different assignment types may produce different success enablers and outcomes.

The approach here could be replicated for other international assignment stakeholders not addressed in this research (such as short-term assignees, the family unit – trailing partner/spouse/children/teenagers-, and host country nationals).

## **6.5 FUTURE RESEARCH DIRECTIONS**

Reflecting on the systematic literature review and the research study, there are a number of potential avenues for future research on international assignment success from a multi-

stakeholder perspective. These represent research opportunities that deserve more scholarly attention in order to drive the research agenda forward.

### **6.5.1 The expatriate and assignment success**

To extend the work of Varma *et al.* (2011) on expatriate readiness, a useful angle would be to clarify what motivates an expatriate and the factors that influence their self-efficacy and hence their readiness. Expatriate readiness should positively impact expatriate adjustment and performance as the expatriate will be motivated to fulfil the objectives of, and complete, the international assignment. Hence, this represents an opportunity for further exploration and validation.

Future research on expatriate adjustment should continue to examine and focus on: (i) the timing of research, the importance of longitudinal studies as opposed to cross-sectional only, and the use of multiple informants (Holopainen and Björkman 2005); (ii) the importance of modes of adjustment (Shay and Baack 2006); (iii) newcomer adjustment (Firth, Chen, Kirkman and Kim 2014); (iv) late newcomer adjustment (Harvey and Kiessling 2004); and (v) the use of social media and mobile technology to enhance our understanding of the role of temporal dynamics in expatriate adjustment (Hippler *et al.* 2015). Another crucial avenue would be to examine the involvement and support received from other salient stakeholders, i.e., the family, the global mobility function, and the host work unit and how this could aid or negate adjustment at different stages of the international assignment cycle.

In the cultural intelligence domain newer constructs that have emerged, i.e., research on sub-dimensions of the CQ factors (Van Dyne, Ang, Ng, Rockstuhl, Tan and Koh 2012) and PsyCap which is a higher order construct of psychological capital characterised by self-efficacy, hope,

optimism and resilience (Dollwet and Reichard 2014; Yunlu and Clapp-Smith 2014), may help to advance our understanding of culture and CQ and how it can affect assignment success.

Further research is warranted in the area of career capital accumulation that results in career progression for the expatriate. The impacts on (a) expatriate retention, (b) effective performance, and (c) assignment success which, in turn, translate into enhanced capabilities for the organisation may prove a fruitful line of enquiry. The role that career mentoring and coaching (pre-, in-, and post-assignment) plays in (a) personal development for the expatriate and his/her family, and (b) better adaptation of the expatriate and his/her family in the host and home environment requires scholarly attention.

Additional research is required to identify the various roles that expatriates undertake as diffusers of knowledge, taking into account all the directions in which knowledge can flow (inward and outward across subsidiary units) and the facilitating role of other stakeholders such as line managers and colleagues.

Within the repatriation domain, scholars need to examine ways to harness the knowledge accumulated from international assignments as this inability to leverage knowledge accumulated from expatriation may be impacting firm competitive advantage. The application of skills acquired whilst on an international assignment upon repatriation is an area that needs to be stressed. It should translate into a positive outcome for both stakeholders as opportunity is afforded to the expatriate to apply and share the knowledge and skills resulting in increased intellectual capital, social capital and commitment for the organisation. Clearly, this deserves scholarly attention.

Finally, given the proliferation of what defines an expatriate, assignment success research could be extended to other expatriate stakeholders for example (short-term assignees, international business travellers, and virtual assignees) to discern their views of success.

### **6.5.2 The Global Mobility Function and assignment success**

For the global mobility function, the role that perceived organisational support (POS) plays in facilitating positive outcomes for the expatriate and the organisation warrants further exploration. An important research opportunity is presenting itself regarding the adoption of a more sequential process approach to POS to ascertain the total picture (Kawai and Strange 2014). More empirical work is required to examine ‘actual’ support provided by the organisation and what the expatriate and additional stakeholders such as the trailing spouse, partner, and family believe would be beneficial in narrowing individual and organisational differences (Lazarova *et al.* 2015; McNulty 2012).

The potential negative outcomes resulting from trends in expatriate compensation need to be explored (from balance sheet to local-plus and/or localisation) as it could be associated with diminished loyalty among expatriates prompting exit and/or withdrawal intentions, and thereby negating assignment success.

Regarding the line manager, there is a need to understand in greater detail the differential impact that home line managers, host line managers and virtual line managers exert on expatriate outcomes.

International assignment success has been, and will continue to be an important and relevant topic in the human resource management and global mobility literature. There are significant

opportunities ahead for gaining a deeper understanding of assignment success, and just some of the avenues that are likely to attract global mobility scholars' attention have been highlighted. Additionally, replication studies are required across key areas in expatriate research (Harzing 2016).

## **6.6 PERSONAL LEARNINGS AND REFLECTIONS AS A RESEARCHER**

Personally, I feel I have learned a substantial amount during this research journey, particularly as a researcher and my approach to research and reflection. I undertook a number of courses which greatly advanced my skillset as a researcher such as library search skills, systematic literature reviews, working with long documents, designing research posters, NVIVO and SPSS.

In 2019 I was invited to join the editorial review board of the *Journal of Global Mobility: The Home of Expatriate Management Research*, having performed some ad-hoc reviews on assignment success and expatriate return on investment (eROI) articles for the editor in 2017.

I have also been afforded the opportunity to present my research at the Irish Academy of Management annual conference and the internal Kemmy Business School PhD Colloquium.

In 2016, I was awarded first prize in the inaugural KBS PhD Research poster competition.

I have also gained experience of conducting a systematic literature review and submitting it for publication. In terms of a publication pipeline, there are three avenues that I would like to target:

1. Publication of the systematic literature review (SLR) in relation to proximal salient stakeholders, enablers and outcomes of success.

2. An empirical paper on stakeholder success perceptions and application to policy and practice for global mobility.
3. An empirical paper concerning the strive of the global mobility function to realise strategic value and talent outcomes.

## 6.7 FINAL THOUGHTS

To conclude, I have enhanced my knowledge and understanding regarding global mobility and its importance in the context of salient stakeholders. There is still much to do in this evolving field. To finish, it is important to remember the following point which was stressed by a senior global mobility manager and on this point I would like to finish:

*You should never forget you are moving people, you are touching family and their loved ones, you should never forget when working on work flows, process maps, that you are touching people's lives. Keep that in mind. You are not just moving boxes or furniture.*

Global Mobility F.

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## **APPENDICES**

Appendix A: Exemplar Studies from SLR

Appendix B: Interview question guide by targeted stakeholder

Appendix C: Research Ethics Form and Sign-Off

Appendix D: Email seeking participation in research

Appendix E: Stake Listings

Appendix F: Coding Round 2

Appendix G: Coding Round 3

Appendix H: Success Criteria Themes by Stakeholder Round 4

Appendix I: Enablers and Outcomes by Stakeholder

**Appendix A: Table: Exemplar empirical studies on international assignment success criteria and stakeholders**

<b>Authors</b>	<b>Year</b>	<b>Stakeholder(s)</b>	<b>Success Criteria</b>	<b>Stakeholder(s) Focus Details &amp; Main Findings</b>
Gregersen, Hite and Black	1996	Human Resources Function Global Mobility Function	Expatriate Performance	<ul style="list-style-type: none"> <li>Based on a sample of 58 HR Specialists who managed the expatriate performance appraisal process in US multinationals, it was found that having a balanced set of reviewers from host and home countries and more frequent performance appraisals relate positively to the perceived accuracy and success of such appraisals.</li> </ul>
Caligiuri	1997	The Expatriate	Expatriate Performance	<ul style="list-style-type: none"> <li>Based on data collected from expatriates working in subsidiaries of a U.S.-based multinational corporation, results supported the hypothesis that three criteria for international assignment success i.e. - (1) completion of the international assignment, (2) cross-cultural adjustment while on assignment, and (3) performance on the international assignment, are separate constructs.</li> </ul>
Tahvanainen	2000	The Expatriate Line Manager Host work unit Human Resources Function	Expatriate Performance	<ul style="list-style-type: none"> <li>Case Study of Nokia Telecommunications.</li> <li>81 semi-structured interviews were conducted with expatriates, line managers, local employees, and human resource specialists.</li> <li>A standard approach to expatriate performance management is not appropriate as the performance of different types of expatriates in different situations should be managed differently.</li> </ul>
Kraimer, Wayne and Jaworski	2001	The Expatriate The Family Line Manager Host work unit	Expatriate Performance	<ul style="list-style-type: none"> <li>A model was developed and tested using a sample of 213 expatriate-supervisor dyads, examining the effects of perceived organisational support (POS), leader member exchange (LMX), and spousal support on expatriates' work, country and host country national interaction adjustment.</li> </ul>

				<ul style="list-style-type: none"> <li>• POS had direct effects on expatriate adjustment, which in turn effected performance. LMX did not influence adjustment, but did effect performance.</li> <li>• No relationship was found between spousal support and expatriate adjustment or performance.</li> </ul>
Suutari and Tahvanainen	2002	The Expatriate	Expatriate Performance	<ul style="list-style-type: none"> <li>• The study was based on 301 respondents (expatriate engineers) to a questionnaire.</li> <li>• Expatriate performance management systems underpinned by performance goals and performance review processes increases the efficiency of the process.</li> </ul>
Martin and Bartol	2003	Human Resources Function Global Mobility Function	Expatriate Performance	<ul style="list-style-type: none"> <li>• Results from 94 questionnaires completed by HR specialists managing expatriate performance management, suggest that clarifying performance expectations prior to the review rating, the fairness of the appraisal system, and the incorporation of career development outcomes positively influence perceptions of success of the expatriate performance appraisal system, whilst consideration of the local host environment in the performance appraisal was not viewed as a significant contributor to perceived system success.</li> </ul>
Shih, Chiang and Kim	2005	The Expatriate Human Resources Function	Expatriate Performance	<ul style="list-style-type: none"> <li>• Semi-structured interviews with 31 randomly selected expatriate employees and five human resource managers were conducted.</li> <li>• The findings show that all of the firms surveyed use standardized performance review forms set by corporate headquarters, which are not tailored and customized to local host country conditions.</li> </ul>

Che Rose, Sri Ramalu, Uli and Kumar	2010b	The Expatriate	Expatriate Performance	<ul style="list-style-type: none"> <li>• Investigates the effects of the Big Five personality traits and its dimensions on expatriate job performance.</li> <li>• Based on sample of 332 expatriates working in Malaysia, personality was found to be a significant determinant of expatriate job performance.</li> <li>• Expatriates in Malaysia with a greater conscientiousness personality trait exhibited better task and contextual performance. Those with greater openness traits performed better in their task, contextual and assignment-specific performance.</li> </ul>
Fee, McGrath-Champ and Yang	2011	The Expatriate Human Resources Function	Expatriate Performance	<ul style="list-style-type: none"> <li>• Explored the expatriate performance management systems of 16 Australian multinationals in China.</li> <li>• Results show that highly internationalised firms tend to be better at deploying the 'hard' components of performance management (goal-setting and performance appraisals), and are ineffective at managing 'soft' mechanisms e.g. training and mentoring.</li> </ul>
Erbacher, D' Netto and España	2006	The Expatriate	Expatriate Readiness	<ul style="list-style-type: none"> <li>• Empirical study using mail questionnaires using a sample of 23 Australian expatriates in China.</li> <li>• The results indicate that performance management, training, organisational support, willingness to relocate and strength of the relationship between the expatriate and the organisation were associated with international assignment success.</li> </ul>
Kramer and Sommer	2013	The Expatriate	Expatriate Readiness	<ul style="list-style-type: none"> <li>• Employees from nine international design and construction firms were surveyed.</li> </ul>

				<ul style="list-style-type: none"> <li>• Being open-minded, flexible, adaptable, and a team-player is important for international assignment success, whilst technical skills and an individual's personality type are not believed to be very important for success.</li> <li>• The family situation was rated as the most important factor.</li> </ul>
Andresen and Margenfeld	2015	The Expatriate	Expatriate Readiness	<ul style="list-style-type: none"> <li>• Boundaryless mindset, previous international experience, social endorsement of global mobility was found to be positively related to global mobility readiness based on an on-line survey of 273 German employees.</li> </ul>
Dollwet and Reichard	2014	The Expatriate	Expatriate Readiness (Psychological Capital (PsyCap))	<ul style="list-style-type: none"> <li>• A new measure of cross-cultural psychological capital (PsyCap – a higher-order construct consisting of four components: self-efficacy, hope, optimism and resilience) was validated in two studies involving 495 participants.</li> </ul>
Yunlu and Clapp-Smith	2014	The Expatriate	Expatriate Readiness (Psychological Capital (PsyCap))	<ul style="list-style-type: none"> <li>• Based on data collected from 192 alumni of a graduate school of international management, it was found that cultural psychological capital has a positive relationship with motivational cultural intelligence.</li> </ul>
Shay and Baack	2004	The Expatriate Host work unit	Expatriate Adjustment	<ul style="list-style-type: none"> <li>• Data from 194 expatriate managers and 505 subordinates working in multinational hotels was used to empirically test a model of expatriate adjustment.</li> <li>• Results indicate the reason for the assignment influenced expatriate modes of adjustment, which in turn influenced both expatriate self-reports of performance and subordinate ratings of their managers.</li> </ul>

Stahl and Caligiuri	2005	The Expatriate	Expatriate Adjustment	<ul style="list-style-type: none"> <li>• Semi-structured interviews with 116 German expatriates on assignment in either Japan or the United States were analysed.</li> <li>• The results suggest that the effectiveness of problem-focused coping strategies in predicting cross-cultural adjustment is moderated by cultural distance and position level but not by length of time on assignment.</li> </ul>
Shay and Baack	2006	The Expatriate Host work unit	Expatriate Adjustment	<ul style="list-style-type: none"> <li>• Used a sample of 153 expatriate managers and 364 host country subordinates from nine multinational hotel companies.</li> <li>• Relationships shown between mode and degree of adjustment and task and contextual performance.</li> </ul>
Shay and Tracey	2009	The Expatriate Host work unit	Expatriate Adjustment	<ul style="list-style-type: none"> <li>• Data collected from 194 expatriates and 505 of their subordinates were analysed to examine the mediating effects of managerial behaviours on the relationship between two modes of expatriate adjustment (role innovation and personal change) and performance.</li> <li>• The authors found evidence of full mediation for the role innovation– performance relationship.</li> <li>• For ratings of expatriate effectiveness, recognising and team building behaviours appear to mediate the role innovation–performance relationship.</li> <li>• For ratings of supervisor satisfaction, inspiring, supporting, and team building mediate the role innovation–performance relationship.</li> </ul>
Firth, Kirkman and Kim	2014	The Expatriate	Expatriate Adjustment	<ul style="list-style-type: none"> <li>• Longitudinal data collected from 70 expatriates in the energy industry during their first four months of an international assignment.</li> </ul>

				<ul style="list-style-type: none"> <li>• Cross-cultural motivation and psychological empowerment related positively to initial levels of adjustment, and indirectly and negatively to work adjustment changes.</li> </ul>
Shi and Franklin	2014	The Expatriate The Family	Expatriate Adjustment	<ul style="list-style-type: none"> <li>• This quantitative study (of 800 participants) investigated expatriates sent to and from China, confirms the existence of links between cross-cultural adjustment, job performance and other factors.</li> <li>• Expatriates accompanied by their trailing partners or family report better cross-cultural adjustment and job performance.</li> <li>• Length of assignment is weakly related to adjustment and performance.</li> </ul>
Singh and Mahmood	2017	The Expatriate	Expatriate Adjustment	<ul style="list-style-type: none"> <li>• A quantitative survey was administered to 301 expatriates in the ICT Sector in Malaysia.</li> <li>• Emotional intelligence (EI) has a strong relationship with the performance of expatriates.</li> </ul>
Harrison, Chadwick and Scales	1996	The Expatriate	Expatriate Personality	<ul style="list-style-type: none"> <li>• A survey of 99 American expatriates in Europe focused on two personality variables: self-efficacy and self-monitoring.</li> <li>• Expatriates with high self-efficacy expressed significantly greater degrees of general, interaction, and work adjustment than those with low self-efficacy.</li> <li>• High self-monitors expressed greater degrees of general and interaction adjustment than low self-monitors.</li> </ul>
Caligiuri	2000	The Expatriate Line Manager	Expatriate Personality	<ul style="list-style-type: none"> <li>• This study (of 143 expatriates and 94 supervisors) proposed and tested the hypotheses that each of the</li> </ul>

				<p>Big Five personality characteristics (Extroversion, Agreeableness, Conscientiousness, Emotional Stability, and Openness or Intellect) predict two criteria of international assignment success: (a) the premature termination of the assignment, and (b) supervisor-rated performance on the assignment.</p> <ul style="list-style-type: none"> <li>• Results indicate that Extroversion, Agreeableness, and Emotional Stability are negatively related to assignment termination.</li> <li>• Conscientiousness was positively related to the supervisor-rated performance.</li> </ul>
Dalton and Wilson	2000	The Expatriate	Expatriate Personality	<ul style="list-style-type: none"> <li>• The relationship of the Five-Factor Model of personality to job performance for 61 Middle Eastern expatriate managers was examined. Job performance ratings from the expatriate's host- and home-country supervisors were analysed.</li> <li>• Job performance ratings indicate that agreeableness and conscientiousness were related to home-country performance but not host-country ratings.</li> </ul>
Kim and Slocum Jr.	2008	The Expatriate	Expatriate Personality	<ul style="list-style-type: none"> <li>• Examines the relationships among individual differences, cross-cultural adjustment, and international assignment effectiveness, using a field survey of 88 U.S.-based Korean expatriates.</li> <li>• International assignment adjustment was not related to premature return intention.</li> </ul>
Downes, Varner and Hemmasi	2010	The Expatriate	Expatriate Personality	<ul style="list-style-type: none"> <li>• Survey data were collected from 118 expatriates to assess the relationship between expatriate personality and effectiveness.</li> <li>• Extraversion, emotional stability, and openness have a significant, positive impact on expatriate adjustment, and agreeableness is significant and</li> </ul>

				positively associated with expatriate job performance.
Bhatti, Battour, Ismail and Sundram	2014	The Expatriate	Expatriate Personality	<ul style="list-style-type: none"> <li>Data were collected from 201 expatriates working in Malaysia.</li> <li>Expatriates' adjustment (work, interaction, and general) mediates the relationship between the big five personality traits (extroversion, openness to experience, agreeableness, conscientiousness, and neuroticism) and expatriates' job performance (task, relationship building, and overall performance).</li> </ul>
Taiwan, Na-Nan and Ngudgratoke	2017	The Expatriate	Expatriate Personality	<ul style="list-style-type: none"> <li>Investigates the effect of personality and transformational leadership on expatriate adjustment and expatriate performance using survey data from 400 employees from 113 international schools in Thailand.</li> <li>Extraversion, openness, and transformational leadership have a positive effect on expatriate adjustment.</li> <li>Extraversion, transformational leadership, and expatriate adjustment positively affect task performance.</li> </ul>
Stone	1991	Line Manager	Selection Techniques	<ul style="list-style-type: none"> <li>Interviews and questionnaire surveys were conducted with managers from 60 leading Australian, New Zealand, UK and USA MNCs.</li> <li>Companies still do not recognise the complexity of international assignment selection.</li> </ul>
Shen and Edwards	2004	Human Resources Function Line Manager	Selection Techniques	<ul style="list-style-type: none"> <li>This study was an empirical investigation of ten Chinese MNEs and their subsidiaries in the UK.</li> </ul>

		The Expatriate		<ul style="list-style-type: none"> <li>• Twenty interviews were conducted at headquarters with HR managers and general managers. Ten interviews were carried out with executive managers in the UK subsidiaries.</li> </ul>
Cheng and Lin	2009	Human Resources Function Global Mobility Function The Expatriate	Selection Techniques	<ul style="list-style-type: none"> <li>• Data for 133 Taiwan SMEs operating in Malaysia and Vietnam were studied.</li> <li>• Four personality traits of assignees, i.e., control ability, independence, openness and social ability influence performance.</li> </ul>
Wang and Varma	2017	Global Mobility Function	Selection Techniques	<ul style="list-style-type: none"> <li>• This study examines moderators of the relationship between cultural distance and expatriate failure in terms of maladjustment and premature return rates.</li> <li>• Results based on a sample of 126 Taiwanese multinational corporations indicate that expatriate selection and performance management practices moderate the cultural distance–maladjustment relationship.</li> <li>• Expatriate performance management practices moderate the cultural distance–premature return relationship.</li> </ul>
Feng and Pearson	1999	The Expatriate	Expatriate Competencies & Skills	<ul style="list-style-type: none"> <li>• Examined selection criteria and specific skills/areas of knowledge that are important to the success of expatriate hotel managers (sample of 133) in China.</li> </ul>
Holopainen and Björkman	2005	The Expatriate Line Manager	Expatriate Competencies & Skills	<ul style="list-style-type: none"> <li>• Explores the relationship between expatriate personal characteristics and job performance based on a sample of 117 expatriates and their supervisors (n=82).</li> <li>• Communicational ability is important for international assignment success.</li> </ul>

				<ul style="list-style-type: none"> <li>• Stress tolerance and relational ability were not found to be related to success.</li> </ul>
Hemmasi, Downes and Varner	2010	The Expatriate	Expatriate Competencies & Skills	<ul style="list-style-type: none"> <li>• Based on data from 125 expatriates, a multidimensional view of success is put forward.</li> <li>• Nine measurement scales are used: cultural adjustment, work-related adjustment, career development, HQ-subsidiary coordination, assignment completion, professional/skill development, shaping and controlling the subsidiary, satisfaction and overall assignment effectiveness.</li> <li>• There is no universal way to conceptualize or assess international assignment success.</li> </ul>
Causin and Ayoun	2011	The Expatriate	Expatriate Competencies & Skills	<ul style="list-style-type: none"> <li>• Survey questionnaires measuring competencies and skills of expatriation were sent to 66 members of the International Hotel and Restaurant Association.</li> <li>• Three categories of international assignment success are highlighted: personal competencies, global management skills, and expatriate adjustment.</li> </ul>
Che Rose, Sri Ramalu, Uli and Kumar	2010a	The Expatriate	Cultural Intelligence (CQ)	<ul style="list-style-type: none"> <li>• Based on a sample of 332 expatriates working in Malaysia, cultural intelligence was found to be a key competency that facilitates expatriates' job performance.</li> <li>• Expatriates in Malaysia with greater meta-cognitive and behavioural cultural intelligence displayed better contextual performance.</li> </ul>
Lee and Sukoco	2010	The Expatriate	Cultural Intelligence (CQ)	<ul style="list-style-type: none"> <li>• Based on a sample of 218 expatriates in MNCs in Taiwan.</li> </ul>

				<ul style="list-style-type: none"> <li>• The results reveal that the positive effect of CQ needs to be mediated by cultural adjustment and cultural effectiveness before affecting performance.</li> <li>• Expatriates' previous international work and travel experiences moderate the effects of CQ on cultural adjustment and effectiveness.</li> </ul>
Wu and Ang	2011	The Expatriate	Cultural Intelligence (CQ)	<ul style="list-style-type: none"> <li>• Based on data from 169 expatriates in Singapore, support practices were positively related to adjustment as well as performance.</li> </ul>
Sri Ramalu, Che Rose, Uli and Kumar	2012	The Expatriate	Cultural Intelligence (CQ)	<ul style="list-style-type: none"> <li>• Investigates the relationship between cultural intelligence and job performance, and the mediating role of cross-cultural adjustment.</li> <li>• Based on sample of 332 expatriates working in Malaysia, cultural intelligence was found to predict job performance, and both interaction and work adjustment act as mediators.</li> </ul>
Malek and Budwhar	2013	The Expatriate	Cultural Intelligence (CQ)	<ul style="list-style-type: none"> <li>• Examines the linkage between cultural intelligence, expatriate adjustment and expatriate performance using data from 134 expatriates based in multinational corporations in Malaysia.</li> <li>• The results highlight expatriates' cultural intelligence impacts general, interaction and work adjustment.</li> </ul>
Jyoti and Kour	2015	The Expatriate	Cultural Intelligence (CQ)	<ul style="list-style-type: none"> <li>• Based on data collected from 225 managers working in nationalized banks in India, the study found that cultural intelligence contributes toward task performance.</li> </ul>
Sambasivan, Sadoughi and Esmaeilzadeh	2017	The Expatriate	Cultural Intelligence (CQ)	<ul style="list-style-type: none"> <li>• Based on survey data collected from 139 expatriates in Malaysia.</li> </ul>

				<ul style="list-style-type: none"> <li>• Cultural empathy, cultural intelligence and spousal support enhance the cultural adjustment of expatriates.</li> </ul>
Bhatti, Battoor and Ismail	2013	The Expatriate	Previous International Experience	<ul style="list-style-type: none"> <li>• Data were collected from 201 assignees working in Malaysia.</li> <li>• The results of the study indicated that expatriate adjustment (work, general and interaction) mediates the relationship between individual (previous international experience, self-efficacy, social network and cultural sensitivity) and organisational factors and expatriate performance.</li> </ul>
Lin and Lin	2014	The Expatriate Host work unit Line Manager	Previous International Experience	<ul style="list-style-type: none"> <li>• Based on the China Chemical and Pharmaceutical Co., Ltd. as the case study in the pharma/medicine industry, 124 expatriates completed a questionnaire on assignment success.</li> <li>• The top five success areas were found to be previous international experience, corporate culture and objectives, career planning and development, local cultural adaptation, and base pay compensation.</li> </ul>
Grant-Vallone and Ensher	2001	The Expatriate	Perceived Organisational Support (POS)	<ul style="list-style-type: none"> <li>• Examines the effect of work and personal life conflict and organisational support on expatriate mental well-being based on a survey of 118 expatriates.</li> <li>• Work–personal life conflict was found to be related to employees’ depression and anxiety.</li> <li>• Whilst organisational support effected well-being and conflict; however, such support did not buffer</li> </ul>

				the negative effects of conflict on the expatriates' well-being.
Kraimer and Wayne	2004	The Expatriate The Global Mobility Function	Perceived Organisational Support (POS)	<ul style="list-style-type: none"> <li>• A multidimensional measure of perceived organisational support (adjustment POS, career POS, and financial POS) within an integrative stress model of success is put forward and tested using 230 expatriate–supervisor dyads.</li> <li>• Support for a multidimensional POS construct is confirmed.</li> </ul>
Wang and Takeuchi	2007	The Expatriate	Perceived Organisational Support (POS)	<ul style="list-style-type: none"> <li>• Using cross-sectional and longitudinal data from expatriates in China, the authors investigated the roles of general, work, and interaction adjustment, work stress and assignment outcome (i.e. job performance and premature return intention) relationships.</li> <li>• At Time 1, 183 expatriates returned a survey, Six months later (Time 2), performance scores from the supervisors for 148 of 183 expatriates were returned.</li> <li>• Expatriate performance and premature return intention relationships were partially mediated by expatriate adjustment.</li> </ul>
Bashir	2012	The Expatriate	Perceived Organisational Support (POS)	<ul style="list-style-type: none"> <li>• Based on an email survey of 900 academic and administrative staff working at 12 Higher Colleges of Technology in five UAE emirates, a positive relationship was found between organisational support and expatriates' cross-cultural adjustment (work, general and interaction adjustment).</li> </ul>
McNulty	2012	The Family	Perceived Organisational Support (POS)	<ul style="list-style-type: none"> <li>• A four-year study of 264 trailing spouses in 54 host-locations examined three types of organisational support (practical, professional and</li> </ul>

				<p>social support) provided to trailing spouses during expatriation.</p> <ul style="list-style-type: none"> <li>• Professional support and social support were perceived by trailing spouses as having the greatest impact on adjustment.</li> <li>• Both types of support appear parsimonious in organisations.</li> </ul>
Kawai and Strange	2014	The Expatriate	Perceived Organisational Support (POS)	<ul style="list-style-type: none"> <li>• Using data on 118 expatriates working in the German subsidiaries of Japanese MNCs, the study examined how perceived organisational support (POS) may impact upon expatriates' work adjustment and affective commitment, and then on their performance.</li> <li>• Both work adjustment and affective commitment play a role in mediating the impact of career support on performance.</li> </ul>
Bader, Berg and Holtbrügge	2015	The Expatriate The Family	Perceived Organisational Support (POS)	<ul style="list-style-type: none"> <li>• Study examines the family-related performance antecedents of 121 expatriate managers in a terrorism-endangered country.</li> <li>• Perceived organisational support can help to diminish the negative influence of safety-related family tension.</li> </ul>
Carraher, Sullivan and Crocitto	2008	The Expatriate Line Manager	Perceived Organisational Support (POS) (Mentoring)	<ul style="list-style-type: none"> <li>• Using survey information as well as company records for 299 expatriates in the health care field (163 men, 136 women) across 10 countries, the impact of home- and host-country mentors upon assignment effectiveness and success was investigated.</li> <li>• Discovered that having a mentor in the host country had a positive effect on organisational knowledge, knowledge-sharing, job performance, promotability, and teamwork.</li> </ul>

				<ul style="list-style-type: none"> <li>• Having a mentor in the home country had a positive effect on organisational knowledge, job performance, and promotability.</li> </ul>
Holtbrügge and Ambrosius	2015	The Expatriate Line Manager	Perceived Organisational Support (POS) (Mentoring)	<ul style="list-style-type: none"> <li>• Study based on a sample of 59 US expatriates on assignment in Germany.</li> <li>• The distance between the mentee and the mentor and the mentor's involvement in career planning are positively related to skill development.</li> <li>• Skill development was positively related to career development.</li> </ul>
Shay and Tracey	1997	The Expatriate The Family	Perceived Organisational Support (POS) (Cross-Cultural Training (CCT))	<ul style="list-style-type: none"> <li>• Based on a survey of 40 expatriates working in the hotel industry, it was found that the spouse's and expatriate's inability to adapt to the host culture were the two most prominent reasons for assignment failure.</li> </ul>
Simeon and Fujii (2000)	2000	The Expatriate The Family	Perceived Organisational Support (POS) (Cross-Cultural Training (CCT))	<ul style="list-style-type: none"> <li>• This study examined the pre-departure preparation of 57 Japanese spouses in Silicon Valley.</li> <li>• It was confirmed that Japanese spouses were able to take advantage of both personal and non-personal sources in the home and host country for effective information gathering to facilitate spousal adjustment.</li> </ul>
Puck, Kittler and Wright	2008	The Expatriate	Perceived Organisational Support (POS) (Cross-Cultural Training (CCT))	<ul style="list-style-type: none"> <li>• Analyses the impact of pre-departure CCT on expatriate adjustment using survey data from 339 expatriates from 20 German Multinational Corporations and an additional 20 semi-structured interviews.</li> <li>• The study found CCT had a miniscule effect on general, interactional or work adjustment.</li> </ul>

Magnini	2009	The Expatriate Host work unit	Perceived Organisational Support (POS) (Cross-Cultural Training (CCT))	<ul style="list-style-type: none"> <li>• This research (based on 19 expatriates working in hotels) reveals that the most commonly used source of real-time training is host country nationals.</li> <li>• It was found that as the number of previous international assignments increases, the use of CD-ROM real-time training products declines and expatriates are less likely to turn to repatriates for advice when there is a large culture distance between the home and host country.</li> </ul>
Shen and Lang	2009	The Global Mobility Function	Perceived Organisational Support (POS) (Cross-Cultural Training (CCT))	<ul style="list-style-type: none"> <li>• Semi-structured interviews with five Australian MNCs were conducted.</li> <li>• Australian MNCs tended to provide highly rigorous CCT, mainly in the form of short-term international assignments which had a stronger impact on expatriates in terms of cross-cultural adjustment and reducing expatriate failure rates than did in-country CCT.</li> </ul>
Qin and Baruch	2010	The Expatriate	Perceived Organisational Support (POS) (Cross-Cultural Training (CCT))	<ul style="list-style-type: none"> <li>• Quantitative data were collected from 82 expatriates from a Chinese firm.</li> <li>• While the impact of pre-departure cross-cultural training was not statistically significant, it was well received and considered important.</li> </ul>
Okpara and Kabongo	2011	The Expatriate	Perceived Organisational Support (POS) (Cross-Cultural Training (CCT))	<ul style="list-style-type: none"> <li>• Study was based on a sample of 226 expatriate managers working in Nigeria.</li> <li>• Results revealed that different types of cross-cultural training affect expatriates' adjustment and that pre-departure training has a positive effect on assignment adjustment.</li> </ul>
Okpara and Kabongo	2017	The Expatriate	Perceived Organisational Support (POS)	<ul style="list-style-type: none"> <li>• Study was based on a sample of 212 expatriate managers working in Nigeria.</li> </ul>

			(Cross-Cultural Training (CCT))	<ul style="list-style-type: none"> <li>• It was found that expatriates' adjustment could be predicted from different types of CCT and both conventional and specific experimental CCT have positive effects on cross-cultural adjustment.</li> </ul>
Feldman and Thomas	1992	The Expatriate Host work unit	Career Capital	<ul style="list-style-type: none"> <li>• Explores international assignments from a career development perspective based on survey responses from 118 expatriates based in Saudi Arabia, Europe, South America, and Japan.</li> <li>• Remaining on an assignment for a long period of time affected career advancement in comparison to domestic home country counterparts.</li> </ul>
Linehan and Scullion	2001	The Expatriate	Career Capital	<ul style="list-style-type: none"> <li>• Results of a study of 50 senior female expatriate managers in Europe indicate that female expatriates are disadvantaged in their careers because of the lack of organisational support.</li> </ul>
Mathur-Helm	2002	The Expatriate	Career Capital	<ul style="list-style-type: none"> <li>• Results from interviews with 25 expatriate women managers in South Africa suggest that women are successful as expatriates and also have successful careers and secure promotion.</li> </ul>
Benson and Pattie	2009	The Expatriate Line Manager	Career Capital	<ul style="list-style-type: none"> <li>• A study of 206 expatriates of a large U.S. professional services firm investigates the impact of home and host supervisors on international assignment success.</li> <li>• Host-country supervisors were found to have greater influence on adjustment and intentions to complete the assignment.</li> <li>• Home-country supervisors had a greater influence over expatriates' longer-term views of career success.</li> </ul>

van Der Heijden, van Engen and Paauwe	2009	The Expatriate The Repatriate The Global Mobility Function	Career Capital	<ul style="list-style-type: none"> <li>• A study of 100 in- and expatriates of a multinational food company found that perceived career support negatively related to intentions to exit and positively related to career opportunities within the home organisation and expatriate performance.</li> </ul>
Cerdin and Le Pargneux	2014	The Expatriate	Career Capital	<ul style="list-style-type: none"> <li>• An empirical study of 303 expatriates (across 90 different companies in 57 countries) investigates individual career characteristics as antecedents of career satisfaction, job satisfaction and intention to leave the organisation.</li> <li>• It was found that careerist orientation and career fit explain job satisfaction, career satisfaction and intention to leave.</li> </ul>
McNulty	2014	The Expatriate	Career Capital	<ul style="list-style-type: none"> <li>• Examines expatriation through the lens of global careers, psychological contracts, and individual return on investment from global mobility from the perspective of 70 expatriates.</li> <li>• Issues of career, compensation, family, and psychological contracts are changing the employment relationship between expatriates and their organisations.</li> <li>• Boundaryless careers are becoming more prevalent for expatriates.</li> </ul>
McNulty, De Cieri and Hutchings	2013	The Expatriate	Psychological Contract	<ul style="list-style-type: none"> <li>• Based on interviews with 31 long-term expatriates in 10 Asian countries, psychological contract theory is used to examine how 'individual return on investment' from an international assignment acts as a key driver of 'corporate return on investment'.</li> </ul>

				<ul style="list-style-type: none"> <li>• Perceived psychological contract fulfilment, in relation to four areas, namely career management support; HR support; performance management and compensation) impacts on expatriates' perceptions of individual return on investment.</li> </ul>
Lee and Kartika	2014	The Expatriate The Family	Psychological Contract	<ul style="list-style-type: none"> <li>• 16 research constructs are investigated: (1) emotional intelligence (EQ), (2) cultural intelligence (CQ), (3) expatriate experience abroad, (4) family support, (5) family adaptability, (6) parental demands, (7) family to work conflict, (8) social capital, (9) mentoring behaviour, (10) expatriate adjustment, (11) expatriate performance, (12) innovative work behaviour, (13) knowledge transfer, (14) organisational performance, (15) psychological contract, and (16) organisational support using a quantitative study of 287 expatriates in Taiwan and China.</li> <li>• Expatriates with higher emotional intelligence, cultural intelligence, and previous international experience display better adjustment.</li> <li>• Family support and family adaptability have a positive influence on expatriate adjustment.</li> <li>• Social capital and mentoring behaviour are also important factors that can enhance assignment success.</li> <li>• Psychological contract and organisational support are important moderators for expatriate adjustment and success.</li> </ul>
Tsang	1999	The Expatriate	Knowledge Stocks / Flows	<ul style="list-style-type: none"> <li>• Examined the knowledge transfer and learning aspects of international human resource</li> </ul>

				<p>management practices adopted by 12 Singapore multinational corporations.</p> <ul style="list-style-type: none"> <li>• The international HR practices in these organisations did not consider expatriates as key agents facilitating knowledge transfer and learning.</li> </ul>
Newton, Hutchings and Kabanoff	2007	The Expatriate Global Mobility Function Human Resources Function	Knowledge Stocks / Flows	<ul style="list-style-type: none"> <li>• A study of 52 HR managers involved in expatriation and repatriation in Australian organisations found that Australian organisations recognise the importance of repatriation, but provide insufficient support.</li> <li>• The organisations in this study did not make use of the repatriates' knowledge and experience gained while on assignment.</li> </ul>
Johnson and Duxbury	2010	The Expatriate	Knowledge Stocks / Flows	<ul style="list-style-type: none"> <li>• A qualitative study of 84 expatriates attempted to examine and extend current conceptualisations of the boundary role of the expatriate with interpersonal relationships a key enabler of knowledge and resource exchange.</li> </ul>
Fish and Wood	1997	The Expatriate The Repatriate Human Resources Function	Family Dimensions & Work-Family Conflict	<ul style="list-style-type: none"> <li>• Quantitative study of 122 respondents in total as follows: human resource specialists (n = 36), expatriates (n = 53), and repatriates (n = 33).</li> <li>• The results indicate spouse/partner supports need to be considered for assignment success.</li> </ul>
Takeuchi, Yun and Tesluk	2002	The Expatriate The Family Line Manager	Family Dimensions & Work-Family Conflict	<ul style="list-style-type: none"> <li>• Data was collected from 215 Japanese expatriates, their spouses, and their supervisors. One hundred seventy-three spouses returned the survey.</li> <li>• Both spill over and crossover effects between expatriate and spousal cross-cultural adjustment were in evidence.</li> </ul>

Shih, Chiang and Hsu	2010	The Family Line Manager Human Resources Function	Family Dimensions & Work-Family Conflict	<ul style="list-style-type: none"> <li>• 174 Taiwanese expatriates in China were included in the study.</li> <li>• Data were collected on: (1) perceived human resource management (HRM) practices concerning 'high involvement work systems'; (2) perceived work-family conflict; (3) job satisfaction; and (4) supervisor ratings of expatriate job performance.</li> <li>• A high involvement work system was found to be positively related to expatriate performance.</li> </ul>
Weeks, Weeks and Willis-Mueller	2010	The Family	Family Dimensions & Work-Family Conflict	<ul style="list-style-type: none"> <li>• A qualitative study of 18 students at a private, international school in Shanghai, China.</li> <li>• Key success criteria for teenager adjustment were the ability to make friends, fit in and be successful in the new location, and in their new schools.</li> </ul>
Gupta, Banerjee and Gaur	2012	The Family	Family Dimensions & Work-Family Conflict	<ul style="list-style-type: none"> <li>• Based on a qualitative study of 26 Indian spouses.</li> <li>• Success factors that influenced the expatriate and spousal adjustment process were personality such as extraversion, organisational and family support, country demographics and pre-departure training.</li> </ul>
Cole and Nesbeth	2014	The Family	Family Dimensions & Work-Family Conflict	<ul style="list-style-type: none"> <li>• Qualitative study of 64 expatriate families.</li> <li>• Family concerns and a lack of organisational support were causes of early return.</li> </ul>
Trompetter, Bussin and Nienaber	2016	The Family	Family Dimensions & Work-Family Conflict	<ul style="list-style-type: none"> <li>• This study of 81 expatriates examined the relationship between family adjustment in the host location and expatriate performance.</li> <li>• More organisational support for families in the new host location is wanted and valued.</li> </ul>
Westropp, Cathro and Everett	2016	The Family	Family Dimensions & Work-Family Conflict	<ul style="list-style-type: none"> <li>• In-depth interviews were conducted with a small sample of ATCKs.</li> </ul>

				<ul style="list-style-type: none"> <li>The ATCKs see themselves as a valuable talent resource for organisations due to their previous international experience as children.</li> </ul>
Liu and Shaffer	2005	The Expatriate Host work unit	Social Capital	<ul style="list-style-type: none"> <li>Data was collected from 147 expatriates working in Hong Kong, Beijing and Shanghai.</li> <li>Social capital was a strong predictor of expatriate performance but was relatively weak in predicting expatriate adjustment.</li> </ul>
Li, Wang and Rothstein	2010	The Expatriate Host work unit	Social Capital	<ul style="list-style-type: none"> <li>This study examined the role of social networks in expatriate effectiveness based on information provided by 96 expatriate alumni from a Canadian business school.</li> <li>Results showed that the size and closeness of an expatriate's social network is important and it was positively related to the amount of social support and cultural information acquired by the expatriate.</li> </ul>
Bruning, Sonpar and Wang	2012	The Expatriate Host work unit	Social Capital	<ul style="list-style-type: none"> <li>Based on a survey of 70 expatriates, and additional interviews with 35 expatriates, it was found that higher network ties with local host country national colleagues were positively associated with performance, but were negatively associated with expatriate adjustment.</li> </ul>
Lee, Veasna and Wu	2013	The Expatriate Host work unit	Social Capital (Local Support Networks)	<ul style="list-style-type: none"> <li>Based on a sample of 156 expatriates based in China.</li> <li>The results indicated that transformational leadership and social support contribute to expatriate adjustment and performance.</li> </ul>
Horak and Yang	2016	The Expatriate Host work unit	Social Capital (Local Support Networks)	<ul style="list-style-type: none"> <li>In-depth interviews were conducted in Seoul, in three timeframes, in 2009, 2012, and 2014 with 32</li> </ul>

				<p>expatriates to explore views of assignment effectiveness.</p> <ul style="list-style-type: none"> <li>Seven key areas for expatriate effectiveness were unearthed: Information transfer, Network access, Task fulfilment, Diversity, Communication with Headquarters, Behavioural ethics, and Relationship building.</li> </ul>
Chen, Kirkman, Kim, Farh and Tangirala	2010	The Expatriate Host work unit	Host Country Dimension (Cultural Distance)	<ul style="list-style-type: none"> <li>Based on data collected from 556 expatriates in 31 international subsidiaries and the expatriates' 2006 and 2007 performance appraisal review ratings, it was discovered that expatriate cross-cultural motivation was positively related to work adjustment and performance, when expatriates were assigned to subsidiaries with lower levels of subsidiary support and cultural distance.</li> </ul>
Waxin, Brewster, Ashill, and Chandon	2016	The Expatriate Host work unit	Host Country Dimension (Cultural Distance)	<ul style="list-style-type: none"> <li>Based on a sample of 224 expatriated managers in New Delhi, India, from four different countries: France, Germany, Korea, and Scandinavia, the impact of five organisational dimensions (role clarity, role discretion, supervisory support, co-workers support and perceived organisational culture dissimilarity) on the expatriates' time to proficiency was examined.</li> <li>All five organisational dimensions were found to have a significant impact on expatriates' time to proficiency.</li> </ul>
Kossek, Huang, Piszczek, Fleenor and Ruderman	2017	The Expatriate	Host Country Dimension (Cultural Distance)	<ul style="list-style-type: none"> <li>A data set of 360-degree ratings of expatriates from 36 countries was used to investigate relationships between cultural distance and ratings of leadership effectiveness in task and contextual performance by subordinates, supervisors and peers of expatriates.</li> </ul>

				<ul style="list-style-type: none"> <li>Results point to the role of cultural distance as peer and subordinate raters may be more likely to have their ratings negatively influenced by cultural distance.</li> </ul>
Salgado and Bastida	2017	The Expatriate Host work unit	Host Country Dimension (Cultural Distance)	<ul style="list-style-type: none"> <li>Based on a survey of 108 Spanish expatriates, it was found that cultural distance and cross-cultural adjustment were predictors of expatriate effectiveness and that achievement, sociability, organisational support, and language skills predicted cross-cultural adjustment and cultural distance.</li> </ul>
Sri Ramalu and Che Rose	2011	The Expatriate Host work unit	Host Country Dimension (Cultural Similarity)	<ul style="list-style-type: none"> <li>This study examined the relationship between perceived cultural similarity and job performance among 332 expatriates in Malaysia.</li> <li>Perceived cultural similarity was found to have a significant positive influence on expatriate job performance.</li> </ul>
Vromans, van Engen and Mol	2013	The Expatriate Host work unit	Host Country Dimension (Cultural Similarity)	<ul style="list-style-type: none"> <li>Introduced the presumed cultural similarity paradox as a possible explanation for the findings that adjusting to a culturally similar country is just as difficult as adjusting to a culturally dissimilar country based on a sample of Dutch expatriates in Belgium and China.</li> </ul>
Paik, Praveen Parboteeah and Shim	2007	The Expatriate Host work unit	Host Country Dimension (Perceived inequity home v. host)	<ul style="list-style-type: none"> <li>Study based on surveys and interviews of Korean expatriates (n=45) as well as local host country Mexican workers (n=551) examined the effects of perception gaps in compensation between host country workers and expatriates and its subsequent impact on organisational commitment, job satisfaction and performance.</li> </ul>

				<ul style="list-style-type: none"> <li>Results indicated significant perception gaps regarding compensation and this was significantly related to affective commitment only, which was found to be positively related to job satisfaction and performance.</li> </ul>
Vance and Ensher	2002	Host work unit Global Mobility Function Human Resources Function	Host Country Dimension (Host Country Workforce (HCW))	<ul style="list-style-type: none"> <li>Data derived from interviews with 47 host country human resource and middle managers in 45 different subsidiaries was used to develop a taxonomy of 10 training design input categories for operative, supervisory/middle management, and upper management layers in order to enhance the success of expatriate training.</li> </ul>
Templer	2010	Host work unit The Expatriate	Host Country Dimension (Host Country Workforce (HCW))	<ul style="list-style-type: none"> <li>129 host-country national employees, who were subordinates of expatriate managers, based in Singapore participated in the study which aimed to establish the importance of expatriate managers' job knowledge, relational leadership skills, and cultural openness and adaptability for success from the perspective of host-country national subordinates.</li> <li>Results showed that subordinates perceived all personal attributes as important, with relational leadership skills deemed to be the most important.</li> </ul>
Malek, Budwhar and Reiche	2015	The Expatriate The Family Host work unit	Host Country Dimension (Host Country Workforce (HCW))	<ul style="list-style-type: none"> <li>Matched data from 134 expatriates and their spouses based in multinationals in Malaysia was used to test the role of perceived support from organisations and host-country nationals for the both expatriate and spousal adjustment.</li> <li>Expatriates and their accompanying spouses found these support mechanisms beneficial for adjusting to the host-country. Improved adjustment in turn</li> </ul>

				was found to have a positive effect on expatriates' performance.
Ang and Tan	2016	The Expatriate Host work unit	Host Country Dimension (Host Country Workforce (HCW))	<ul style="list-style-type: none"> <li>• Qualitative data was collected via interviews with 12 expatriate managers and 34 host country nationals from seven multinational companies in Shanghai in order to understand how expatriate managers build trust with their host country nationals (HCNs) in China.</li> <li>• Discovered that expatriate managers and HCN managers build trust which becomes stronger over time via the cultural intelligence of the expatriate managers.</li> </ul>
Mehegan	2007	The Expatriate The Repatriate Global mobility Function Human Resources Function	Host Country Dimension (Host Country Characteristics)	<ul style="list-style-type: none"> <li>• 89 in-depth interviews were conducted with Australian expatriates and repatriates, cross-cultural trainers, representatives of industry bodies and HR departments responsible for the selection, training, support and repatriation processes for international assignees.</li> <li>• A number of factors emerged that impacted on the likelihood of success or failure of an assignment for example interactions with host nationals, in-country support, cultural distance, security, lifestyle and career enhancement.</li> </ul>
Kim and Froese	2012	The Expatriate The Family Host work unit	Host Country Dimension (Host Country Characteristics)	<ul style="list-style-type: none"> <li>• 151 married Korean employees were surveyed to examine the effects of host-country characteristics such as economic level and language and employee's work and family commitments on willingness to undertake an international assignment.</li> </ul>

				<ul style="list-style-type: none"><li>• Results show that host-country characteristics and work commitment have direct effects on employees' willingness to expatriate.</li><li>• Employees who have children closer to school age are more willing to undertake an assignment.</li></ul>
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**Appendix B: Semi-Structured Interview Question Guide by Stakeholder**

Stakeholder	Questions Guide (derived from the extant academic literature, Brookfield, Cartus, International HR Adviser, Permits Foundation; K2 Corporatemobility)	Notes/Thoughts/Observations	Reflective Notes
<p>Long-term Expatriate            Definition: Typically 3 years in duration, sometimes up to 5 years. Then ideally should be localising or repatriating.            May also include an assignee who has just repatriated (in last 3 months) to discuss their experiences as an international assignee. Ideally on assignment for at least a year.</p>	<p>Before we begin the interview, I would like to ask you a few biographical questions in relation to yourself and the international assignment:</p> <p><b><u>Q1. Long-term Expatriate Profile:</u></b></p> <ul style="list-style-type: none"> <li>(a) Note gender.</li> <li>(b) What is your occupation?</li> <li>(c) What is your position on this international assignment? Function? Front Office/ Back Office? Support/Income Generating?</li> <li>(d) Where is the assignment located? Note organisation sector.</li> <li>(e) What is the assignment duration?</li> <li>(f) How many years have you been employed in the home organisation? And host organisation?</li> <li>(g) Describe briefly your tasks in the home and host organisation.</li> <li>(h) What is your marital status?</li> </ul> <p><b><u>Q2. Preparation (pre-departure):</u></b></p> <ul style="list-style-type: none"> <li>(a) Turning to the pre-departure phase, what motivated you to undertake this assignment?</li> <li>(b) Describe the supports and training available to you in the pre-departure phase?</li> <li>(c) Was the support you received adequate?</li> <li>(d) Would you like to have received additional support?</li> <li>(e) Describe the supports available to your family (if applicable) in the pre-departure phase?</li> </ul>		

	<p><b><u>Q3. The current assignment and outcomes:</u></b></p> <ul style="list-style-type: none"> <li>(a) Turning to the current international assignment, what is the purpose of this assignment? What are the goals of the assignment? Probe Developmental? Strategic/Operational?</li> <li>(b) Is this your first assignment? Do you have previous international assignment experience?</li> <li>(c) What is your length of time on assignment?</li> <li>(d) What has gone well so far? Not so well?</li> <li>(e) Describe the adjustment process.</li> <li>(f) What challenges have you encountered to date? Have you overcome these? How?</li> <li>(g) In relation to career impact, have you had a positive or negative experience?</li> <li>(h) Describe the support you received from the organisation. Probe career management support, general adjustment support, financial support</li> <li>(i) Tell me about the expatriate performance management and appraisal process. Probe what form does it take? Are your raters in multiple locations? Is 360 degree feedback used? Is a standard or customised expatriate performance appraisal form used?</li> <li>(j) Do you find it effective?</li> <li>(k) In relation to social capital and networks, have you created ties with host country nationals?</li> <li>(l) Has this helped with your adjustment?</li> <li>(m) Is there a coaching programme available? Do you see benefits?</li> <li>(n) Do you avail of a mentor? Do you see benefits?</li> <li>(o) Describe the role of your home and host supervisor.</li> </ul> <p><b><u>Q4. Views and perceptions of international assignment success:</u></b></p> <ul style="list-style-type: none"> <li>(a) List the successful/ positive <u>outcomes</u> of an international assignment from your perspective as an expatriate.</li> </ul>		
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	<p>(b) From these outcomes, list the top 3 outcome priorities from the international assignment.</p> <p>(c) Describe a successful international assignment.</p> <p>(d) Describe an unsuccessful international assignment.</p> <p><b><u>Q5. Family:</u></b></p> <p>(a) Did your family move with you? Why? Why not? If so, from the very beginning?</p> <p>(b) Do you have a trailing spouse/partner? Or Split family arrangement? Number of accompanying children?</p> <p>(c) Did your family receive cross cultural training (pre-departure and during assignment)? Was it effective?</p> <p>(d) Tell me about your family's adjustment.</p> <p><b><u>Q6. Repatriation:</u></b></p> <p>(a) Looking ahead upon assignment completion, will you return to the home location or undertake another assignment concurrently?</p> <p>(b) If returning in the next 6 months, have you started discussions with HR/your line manager?</p> <p>(c) What form of repatriation support is available to you from the organisation?</p> <p>(d) Would you be willing to undertake another assignment?</p>		
<p>Repatriated Assignee Definition: An expatriate who has repatriated to the home country environment in the past 12-18 months.</p>	<p>Before we begin the interview, I would like to ask you a few biographical questions in relation to you and the completed international assignment:</p> <p><b><u>Q1. Repatriate Profile:</u></b></p> <p>(a) Note gender.</p> <p>(b) What is your occupation?</p>		

	<p>(c) What was your position on your most recent international assignment? Function? Front Office/ Back Office? Support/Income Generating?</p> <p>(d) Where was the assignment located? Note organisation sector.</p> <p>(e) What was the assignment duration?</p> <p>(f) How many years have you been employed in the home organisation? And host organisation?</p> <p>(g) Describe your tasks in the home and host organisation.</p> <p>(h) What is your marital status?</p> <p><b><u>Q2. Preparation (pre-departure):</u></b></p> <p>(a) Reflecting on your last completed assignment, what motivated you to undertake that assignment?</p> <p>(b) Describe the supports and training available to you in the pre-departure phase?</p> <p>(c) Was the support you received adequate?</p> <p>(d) Would you like to have received additional support?</p> <p>(e) Describe the supports available to your family (if applicable) in the pre-departure phase?</p> <p><b><u>Q3. The previous assignment and outcomes:</u></b></p> <p>(a) Turning to your completed international assignment, what was the purpose of this assignment? What were the goals of the assignment? Probe Developmental? Strategic/Operational? Project Delivery?</p> <p>(b) Was this your first assignment? Did you have previous international assignment experience?</p> <p>(c) What was your length of time on assignment?</p> <p>(d) What went well? Not so well?</p> <p>(e) Describe the adjustment process.</p>		
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	<p>(f) What challenges did you encounter? Did you overcome these? How?</p> <p>(g) In relation to career impact, did you have a positive or negative experience?</p> <p>(h) Describe the support you received from the organisation. Probe career management support, general adjustment support, financial support</p> <p>(i) Tell me about the expatriate performance management and appraisal process. Probe what form did it take? Were your raters in multiple locations? Was 360 degree feedback used? Was a standard or customised expatriate performance appraisal form used?</p> <p>(j) Did you find it effective?</p> <p>(k) In relation to social capital and networks, did you create ties with host country nationals?</p> <p>(l) Would this have helped with your adjustment?</p> <p>(m) Did these ties continue after returning to the home environment?</p> <p>(n) Is there a coaching programme available? Did you see benefits? Has this continued into the home environment?</p> <p>(o) Did you avail of a mentor? Did you see benefits? Has this continued into the home environment?</p> <p>(p) Describe the role of your home and host supervisor.</p> <p><b><u>Q4. Views and perceptions of international assignment success:</u></b></p> <p>(a) List the successful/ positive <u>outcomes</u> of an international assignment from your perspective as a repatriate.</p> <p>(b) From these outcomes, list the top 3 outcome priorities from the international assignment.</p> <p>(c) Describe a successful international assignment.</p> <p>(d) Describe an unsuccessful international assignment.</p> <p><b><u>Q5. Family:</u></b></p>		
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	<p>(a) Did your family move with you? Why? Why not? If so, from the very beginning?</p> <p>(b) Did you have a trailing spouse/partner? Or Split family arrangement? Number of accompanying children?</p> <p>(c) Did your family receive cross cultural training? Was it effective?</p> <p>(d) Tell me about your family's adjustment.</p> <p><b><u>Q6. Repatriation:</u></b></p> <p>(a) How long are you back in the home country?</p> <p>(b) Describe the reintegration process back to the home organisation. Probe did you receive repatriation support and reintegration training? Did you receive career management support?</p> <p>(c) Would you be willing to undertake another assignment?</p> <p>(d) When did discussions with your line manager and HR begin to kick start the repatriation process?</p> <p>(e) Does the organisation have a written repatriation policy?</p> <p>(f) Have you had an opportunity to apply the skills you acquired whilst on assignment to your new role in the home environment?</p>		
<p>Line Manager Definition: Line manager of an expatriate(s) in a host country environment</p>	<p>Before we begin the interview, I would like to ask you a few biographical questions:</p> <p><b><u>Q1. Line Manager Profile:</u></b></p> <p>(a) Note gender.</p> <p>(b) What is your occupation?</p> <p>(c) What is your position in the organisation? Function? Front Office/ Back Office? Support/Income Generating?</p> <p>(d) What is your location? Note organisation sector.</p> <p>(e) How many years have you been employed in the host organisation?</p>		

	<p>(f) Describe your tasks in the host organisation.</p> <p>(g) What is your number of direct reports?</p> <p>(h) How many expatriates do you currently manage?</p> <p>(i) How many expatriates have you managed previously?</p> <p><b><u>Q2. Preparation (pre-departure):</u></b></p> <p>(a) Turning to the pre-departure phase, what are the reasons/motives for utilising expatriates over local hires?</p> <p>(b) What are the selection criteria for potential expatriates?</p> <p>(c) How are assignees selected for an assignment?</p> <p>(d) What are the consequences of not accepting an international assignment?</p> <p>(e) Does the organisation provide any kind of preparation training before departure? Describe.</p> <p>(f) Do you think expatriates are adequately prepared?</p> <p><b><u>Q3. Views and perceptions of international assignment success:</u></b></p> <p>(a) List the successful/positive outcomes for an expatriate, for you as a line manager, and the organisation</p> <p>(b) From these outcomes, list the top 3 outcome priorities from the international assignment.</p> <p>(c) What value does global mobility bring to your business?</p> <p>(d) In your opinion, what is a successful expatriate? What skills and competencies are essential for success? Are expatriate competencies and skills assessed?</p> <p>(e) Describe an unsuccessful international assignment.</p> <p>(f) What challenges does your expatriate face in the host environment?</p> <p>(g) Tell me about the expatriate performance management and appraisal process. Probe what form does it take? Are raters based in multiple locations? Is 360 degree feedback used? Is a standard or customised expatriate performance appraisal form used?</p>		
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	<p>(h) Do you find the process effective? How would you rate the process?</p> <p><b><u>Q4. Repatriation:</u></b>  (a) Describe your involvement in the repatriation process.</p>		
<p>Global Mobility Manager and/or Specialist/Senior Specialist  Definition: Manager of global mobility function and specialist on the team. In some organisations, this may be a rewards manager and analyst/specialist. The position title international assignments specialist/relationship manager/consultant may exist in some organisations.</p>	<p>Before we begin the interview, I would like to ask you a few biographical questions and expatriate profile and measurement questions:</p> <p><b><u>Q1. Global Mobility Function Profile:</u></b>  (a) Who does the Global Mobility function report to? Reward or Talent Management or Other.  (b) Describe the Team make up in terms of roles and responsibilities.</p> <p><b><u>Q2. Global Mobility policies:</u></b>  (a) List the assignment policies currently in place in your organisation. For example:</p> <ul style="list-style-type: none"> <li>• Long-term Assignments (1 year or greater)</li> <li>• Short-term Assignments (3 - 12 months)</li> <li>• Localization (conversion away from international assignee status to local standards)</li> <li>• One-way Permanent Moves</li> <li>• Extended Business Travel (less than 3-months)</li> <li>• Commuter Assignments</li> <li>• Developmental</li> <li>• Local Hires</li> <li>• Rotational Assignments</li> <li>• Graduate</li> </ul>		

	<ul style="list-style-type: none"> <li>• Flexible (policy based on a core of required benefits and additional optional benefits based on need)</li> <li>• Virtual Teams</li> <li>• Other</li> <li>• Strategic/Operational</li> </ul> <p>(b) Does the organisation have a written Global Mobility Policy?</p> <p>(c) Does the policy differentiate long-term versus short-term?</p> <p>(d) Developmental v strategic v operational v project delivery?</p> <p>(e) Does the organisation have a written repatriation policy? Is this linked to career support?</p> <p><b><u>Q3. International assignment profile:</u></b></p> <p>(a) Is the number of assignees increasing or decreasing? Anticipated growth if applicable.</p> <p>(b) Please indicate the following:</p> <ul style="list-style-type: none"> <li>• Typical Age profile of assignees?</li> <li>• Typical Marital status of assignees?</li> <li>• Children accompany/ spouse /partner accompany or single- status?</li> <li>• Typical objectives of assignments? Typical Challenges?</li> <li>• Typical source of expatriates (from corporate headquarters or third country)?</li> <li>• Where is the top destination for assignees in your organisation?</li> </ul> <p><b><u>Q4. Support</u></b></p> <p>(a) What types of support are provided to expatriates?</p> <p>(b) In relation to financial support, is balance sheet or local-plus adopted? If localising is there a lead in transfer time to localise?</p>		
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	<p>(c) What is the approach to compensation for long-term assignees and short-term assignees?</p> <p>(d) Is cross cultural training (CCT) available? Pre, In, Post. Form? Who is it available to? Can the accompanying family avail of it?</p> <p>(e) What forms of assistance are available to spouse/partner of assignees?</p> <p><b><u>Q5. Measurement:</u></b></p> <p>(a) Are assignments refused? Why? Do you record?</p> <p>(b) What are the reasons for premature return and failure? Do you record statistics on failure and premature return?</p> <p>(c) Do you measure attrition from international assignments and the reasons for same?</p> <p>(d) Are there specific locations with high failure rates?</p> <p>(e) Is cost reduction a priority area? If so, areas of cost reduction targeted? Is cost tracking conducted? (At Pre-, In, Post stages?)</p> <p>(f) If applicable, what types of cost reduction strategies is the function pursuing? (Probe for example policy review, process efficiencies, tighter supplier cost management controls, changing benefits packages within policies, rationalisation of service providers, bundling of relocation services, changing approach to compensation, reduce number of assignments, change type of employee being assigned, reduce the number of suppliers).</p> <p>(g) What system do you use to estimate and track assignment costs? (Probe for example MS Excel, in-house system, outsourced to external provider, other).</p> <p>(h) Any services outsourced? Plan to outsource? For example Compliance (tax, social security, immigration) Vendor management and coordination Financial management (expenses, invoicing, payment and tracking Policy consulting Programme administration Payroll administration</p>		
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	<p>(i) If so, does the function measure the vendor company performance? How? What metrics to measure?</p> <p><b><u>Q6. Views and perceptions of international assignment success:</u></b></p> <p>(a) List the successful/positive <u>outcomes</u> of an international assignment.</p> <p>(b) From these outcomes, list the top 3 outcome priorities from the international assignment for the global mobility function.</p> <p>(c) Do you measure assignment success? If so, what priorities are included?</p> <p>(d) How would the organisation rate its measurement approach? What in your opinion are the challenges / barriers to measurement? What are the reasons for not measuring if this is the case?</p> <p>(e) What negates assignment success?</p> <p>(f) How often is assignment success measured? Are metrics included in management/board reports?</p> <p>(g) What activities does GM spend most time on? Versus should spend time on? (Probe for example assignment administration, assignment compensation and benefits, tax compliance, immigration compliance, assignment management, co-ordinating with other departments, relocation destination services, payroll, supplier management, removals and household goods, expense management, evaluation of expatriate v local hire, employment law, recruitment, reports for the business, strategic workforce planning, non-mobility HR activities, assignment candidate selection, managing department IT system, other).</p> <p>(h) Describe the value add to the business that the function provides.</p> <p>(i) Describe your mobility brand.</p> <p>(j) How do you raise the profile of global mobility in your organisation?</p>		
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<p>HR Manager/Business Partner (Home and Host)</p> <p>Definition: HR manager responsible for the delivery of HR services to assignees in the home or host locations. In some organisations, this may be an international assignments HR relationship manager</p>	<p>Before we begin the interview, I would like to ask you a few biographical questions:</p> <p><b><u>Q1. HR Manager/Business Partner profile:</u></b></p> <ul style="list-style-type: none"> <li>(a) What is your occupation?</li> <li>(b) What is your position in the organisation?</li> <li>(c) What is your location? Note organisation sector.</li> <li>(d) How many years have you been employed in the home/ host organisation?</li> <li>(e) Describe your tasks in the home/host organisation.</li> <li>(f) What is your number of direct reports?</li> <li>(g) How many expatriates do you currently manage or oversee for assignment purposes?</li> <li>(h) How many expatriates have you managed previously or overseen for assignment purposes?</li> </ul> <p><b><u>Q2. Preparation (pre-departure):</u></b></p> <ul style="list-style-type: none"> <li>(a) Turning to the pre-departure phase, what are the reasons/motives for utilising expatriates over local hires?</li> <li>(b) What are the selection criteria for potential expatriates?</li> <li>(c) How are assignees selected for an assignment?</li> <li>(d) What are the consequences of not accepting an international assignment?</li> <li>(e) Does the organisation provide any kind of preparation training before departure? Describe.</li> <li>(f) Do you think expatriates are adequately prepared?</li> </ul> <p><b><u>Q3. The current assignment and outcomes:</u></b></p> <ul style="list-style-type: none"> <li>(a) What challenges do your expatriates face in the host environment?</li> </ul>		
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	<p>(b) Is there a formal career management process in place for assignees? What form does it take?</p> <p><b><u>Q4. Views and perceptions of international assignment success:</u></b></p> <p>(a) List the successful/positive outcomes for an expatriate, for you as a HR manager, and the organisation.</p> <p>(b) From these outcomes, list the top 3 outcome priorities from the international assignment for the HR function.</p> <p>(c) What value does global mobility bring to the business?</p> <p>(d) In your opinion, what is a successful expatriate? What skills and competencies are essential for success? Are expatriate competencies and skills assessed?</p> <p>(e) Describe an unsuccessful international assignment.</p> <p>(f) How would your organisation define/describe assignment success?</p> <p>(g) What is measured?</p> <p>(h) What should be measured?</p> <p>(i) What is your part in measurement?</p> <p>(j) Tell me about the expatriate performance management and appraisal process. Probe what form does it take? Are raters based in multiple locations? Is 360 degree feedback used? Is a standard or customised expatriate performance appraisal form used? Do you find the process effective?</p> <p><b><u>Q5. Repatriation:</u></b></p> <p>(a) Describe your involvement in the repatriation process.</p> <p>(b) What form of consultation takes place with repatriates' preparation to find a position in the home organisation?</p>		
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UNIVERSITY of LIMERICK  
O L L S C O I L L U I M I N I G H  
Kemmy Business School Research Ethics Committee  
Application Form

The completion of this form is only necessary where the proposed research involves working with human subjects.<sup>1</sup>

Faculty and PhD Research Students (please note that your answers must be typed)

Name: Kathryn Brosnan  
E-mail Address: kathryn.brosnan@ul.ie  
Date: 02/04/2015  
Title of Project (please do not use acronyms): Measuring the return on investment of long- and short-term international assignments: A multi-stakeholder perspective  
Names of other researchers involved: \_\_\_\_\_

**PART A**

Research Purpose: (50-100 words)

The purpose of the research is to elucidate the conceptualisation and understanding of the phenomenon of expatriate return on investment (eROI) as it is open to varying interpretations in the extant literature from both an organisational and individual perspective. Scholars to date have focused primarily on various ROI factors in isolation (e.g. adjustment, performance, career capital, perceived organisational support, the role of the family) and from an expatriate-centric viewpoint. In order to fully understand the concept the perceptions of all stakeholders (both salient and distal) that impinge on the global assignment cycle is necessary as different stakeholders will hold different perceptions of ROI and success. The full stakeholder listing is contained in the following section.

Research Methodology: (100-150 words)

It is proposed to conduct the research in two phases. In phase one, two baseline organisations, heavily engaged in expatriation as a talent management strategy, will be approached ( [REDACTED] ). Subject to their

<sup>1</sup> Examples of research involving human subjects include (but are not limited to): carrying out interviews; conducting a survey; distributing a questionnaire; using focus groups; and the observation of individuals or groups.

agreement to participate, semi-structured interviews and/or focus groups (dependent on availability and participant numbers) with all relevant stakeholders involved will be adopted to extract the pertinent return on investment factors. The resultant output factors will then form the basis of the on-line survey research instrument which will be distributed for completion to a sufficient cohort of representative stakeholders. It is intended to use a number of mediums to acquire participants, namely the two respective baseline organisations, and the business networking tool LinkedIn. Participants will be required to rank the factors. The stakeholders to target as part of this research are as follows:

- Long-term expatriates, whether company-assigned or self-initiated (i.e. Parent Country National or Third Country National)
- Line managers of expatriates whether company-assigned or self-initiated
- Short-term assignees, whether company-assigned or self-initiated (i.e. Parent Country National or Third Country National)
- The home (sending) organisation, including CEO, human resource manager/business partner and/or global mobility manager, and the finance/tax manager
- The host (receiving) organisation, including CEO, human resource manager/business partner and/or global mobility manager, and the finance/tax manager
- Repatriated assignees
- Spouse/Partner of long-term and short-term assignees, and repatriates
- Third party relocation vendors
- Host country nationals (local employees)

## 1. Human Subjects

Does the research proposal involve:

- |     |   |                              |                             |
|-----|---|------------------------------|-----------------------------|
| (a) | Any person under the age of 18?   | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (b) | Adult patients?   | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (c) | Adults with psychological impairments?  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (d) | Adults with learning difficulties?  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (e) | Adults under the protection/<br>control/influence of others (e.g., in care/ in prison)? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (f) | Relatives of ill people<br>(e.g., parents of sick children)?                            | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (g) | People who may only have a basic knowledge<br>of English?                               | Yes <input type="checkbox"/> | No <input type="checkbox"/> |

## 2. Subject Matter

Does the research proposal involve:

- |     |   |                              |                             |
|-----|---|------------------------------|-----------------------------|
| (a) | Sensitive personal issues? (e.g., suicide, bereavement,<br>gender identity, sexuality, fertility, abortion,<br>gambling)? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (b) | Illegal activities, illicit drug taking, substance abuse<br>or the self reporting of criminal behaviour?                  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (c) | Any act that might diminish self-respect or cause   |                              |                             |

- shame, embarrassment or regret? Yes  No
- (d) Research into politically and/or racially/ethically sensitive areas? Yes  No

### 3. Procedures

Does the proposal involve:

- (a) Use of personal or company records without consent? Yes  No
- (b) Deception of participants? Yes  No
- (c) The offer of disproportionately large inducements to participate? Yes  No
- (d) Audio or visual recording without consent? Yes  No
- (e) Invasive physical interventions or treatments? Yes  No
- (f) Research which might put researchers or participants at risk? Yes  No

### 4. (a) Who will your informants be?

Informants will be a broad mix of organisational employees (and in some cases trailing spouses/partners) in the targeted organisations. Informants will originate from all levels of the organisational hierarchy from the Senior/Executive level, through to middle management and staff. One of the external stakeholders is the third party relocation vendor involved in providing relocation assistance and training and their input would be sought as a stakeholder.

- (b) Do you have a **pre-existing relationship** with the informants and, if so, what is the nature of that relationship?

I have previously worked with one of the targeted organisations (██████████) in a HR management capacity and some of the respondents may be former work colleagues be it in global mobility/reward or in an expatriate capacity.

- (c) How do you plan to gain **access to /contact/approach** potential informants?

Access will be facilitated via the HR departments and managers responsible for global mobility. The global mobility function would be a first point of contact. Other avenues of contact would be personal HR contacts in the respective organisations.

- (d) What arrangements have you made for **anonymity and confidentiality**?

Participants will be assured at all times that their responses will be anonymous and confidential. Each participant will be tied back to the stakeholder group he/she represents. Name will not be a required field on the on-line survey.

- (e) What, if any, is the **particular vulnerability of your informants**?

N/A

- (f) What arrangements are in place to ensure that informants know the **purpose of the research** and what they are going to inform about?

I will undertake an engagement and communications exercise whereby each participant will receive a letter/email communication informing them of the purpose of the research, assuring them of their anonymity and the confidential nature of the information gathered. Should the participating organisations require a report on the research findings, I will furnish same.

- (g) How will you ensure that informants are aware of their **right to refuse** to participate or **withdraw** at any time?

Informants will be made aware of their option and right not to participate if they so wish and their entitlement to withdraw from the research at any time. This will be communicated at interview/focus group stage and will be highlighted in writing on the survey.

- (h) How would you handle any unforeseen **safety issues** should they arise?

Any unforeseen safety issues would be dealt with as they arise depending on the context and circumstances.

- (i) How do you propose to **store the information**?

All semi-structured interviews and focus group outputs will be recorded and transcribed on NVIVO. SPSS will be used for storage and analysis of survey factors and responses. Returned surveys will be stored on a computer drive and back up storage disc.

If you have answered **YES** to any of the questions in **PART A, sections 1-3**, you will also need to **comply with** the requirements of **PART B** of this form.

If you have answered **NO** to all of the questions in **PART A, sections 1-3** above, please **ignore PART B** of the form.

You should return **8 hard copies** of this form to Michelle Cunningham, Research Administrator, Room SG-09, Kemmy Business School, University of Limerick or alternatively applications can be left in the drop box marked KBS Research Ethics Applications located on level 3 of the Kemmy Business School. This form must be submitted before the research begins.

Signature of principle investigator: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor Signature (where relevant): \_\_\_\_\_ Date: \_\_\_\_\_

### **Insurance Cover**

Insurance cover is required for all research carried out by UL employees. Principal Investigators/Supervisors should carefully view the University's 'Insurance Guidelines for Researchers' document and the University's Insurance cover to ascertain if their proposed research is covered. These documents are available at <http://www.ul.ie/insurance>.

Where any query arises about whether or not proposed research is covered by insurance, the Principal Investigator/Supervisor must contact the University's Insurance Administrator at [insurance@ul.ie](mailto:insurance@ul.ie) to confirm that the required level of insurance cover is in place.

Please indicate by way of signature that the research project is covered by UL's insurance policies:

PI/Supervisor signature: \_\_\_\_\_

## **PART B**

This part of the application form is only relevant where researchers have answered **'YES'** to any of the questions in **sections 1-3 of PART A**.

Please attach a report to this application addressing the following questions with a maximum of 300 words per question.

You must answer the following questions:

1. What are the ethical issues involved in your research?
2. Explain why the use of human participants is essential to your research project.
3. How will you ensure that informed consent is freely given by human participants?

Answer the following questions where relevant to your research project and after consultation with your supervisor (where relevant) and a member of the KBS Research Ethics Committee:

4. How will you protect human participants if your research deals with sensitive issues?
5. How will you ensure that vulnerable research participants are protected? (Please state clearly if you abide by the Child Protection Guidelines and/or have Garda Clearance where necessary)
6. How will you protect human participants if your research deals with sensitive research procedures?
7. Outline how you intend to comply with any established procedures which have been approved by ULREG for your research.
8. How will you manage data protection issues?

**Sign Off**  
**Research Ethics Approval**

Dear Kathryn,

Thank you for your email. Your answers have addressed our concerns.  
Your project has received Research Ethics Approval.  
Regards

Dr Patrick Buckley  
Chair of the Kemmy Business School Research Ethics Committee  
Lecturer in Information Management  
Department of Management and Marketing  
The Kemmy Business School  
University of Limerick

00 353 (0)61 233770

**From:** Kathryn.Brosnan  
**Sent:** 15 May 2015 16:44  
**To:** Patrick.Buckley  
**Cc:** Michael.Morley; Michelle.Cunningham  
**Subject:** RE: KBSREC - May 15 - PhD - Kathryn Brosnan

Dear Patrick,

Thanks for reviewing my research ethics application. I confirm that I will conduct the following in line with the KBS Research Ethics Committee recommendations:

- contact informants directly, once they have been identified;
- inform participants that this research is being conducted as part of a UL student thesis;
- confirm that all data will be stored on a password protected computer;
- inform participants that a report on the research may be submitted to the company, if requested.

Kind Regards,  
Kathryn.

*Kathryn Brosnan*  
*PhD Scholar*  
*Kemmy Business School*  
*University of Limerick*  
*Mob: 353 87 6709199*

**From:** Michelle.Cunningham  
**Sent:** 15 May 2015 15:19  
**To:** Kathryn.Brosnan

**Cc:** Michael.Morley; Patrick.Buckley

**Subject:** KBSREC - May 15 - PhD - Kathryn Brosnan

Dear Kathryn,

Many thanks for your research ethics application which was reviewed by the KBS Research Ethics Committee on the 13<sup>th</sup> May 2015. The Committee has requested that you -

contact informants directly, once they have been identified;  
inform participants that this research is being conducted as part of a UL student thesis;  
confirm that all data will be stored on a password protected computer;  
inform participants that a report on the research may be submitted to the company, if requested.

Please reply to Dr Patrick Buckley, Chair, KBS Research Ethics Committee at [Patrick.Buckley@ul.ie](mailto:Patrick.Buckley@ul.ie) confirming the above.

Many thanks and kind regards.

Michelle

Michelle Cunningham  
KBS Research Office  
Kemmy Business School  
University of Limerick  
Limerick  
Ph: 353 61 202627 - Room SG-09  
Email: [michelle.cunningham@ul.ie](mailto:michelle.cunningham@ul.ie)

## **Appendix D: Organisational Approach Email Regarding Project Background**

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### **Re: Research partnership with the University of Limerick on international assignment success and expatriate return on investment**

My name is Kathryn Brosnan and I am a PhD researcher with the University of Limerick. I am an experienced HR Professional with more than twelve years of experience in the areas of Organisation Development, Total Rewards and e-HR across multiple organisations such as [REDACTED].

#### **Research Project**

I would like to introduce you to an exciting research opportunity in conjunction with the University of Limerick with the hope of a possible partnership. We are currently reaching out to organisations that build staff capabilities within their organisations through the utilization of international assignments as a global staffing strategy. We have selected your organisation as a possible partner in this research because of your global reach and your use of both long- and short-term assignments to deliver on business and client objectives.

#### **Research Objectives**

The research is looking at how we can ensure the optimum return on investment on international assignments. In this research, we will focus on identifying the main stakeholders in the international assignment cycle, identify their priorities in the cycle and examine the extent to which stakeholders have complementary and competing priorities. This will be a comprehensive body of research that has not been approached in this manner before. We will be conducting a systematic review of the literature on what has been established heretofore. Post this review we will be conducting a detailed investigation among key stakeholders. The types of stakeholders we would like to consider are: long-term expatriates; short-term assignees; repatriates; global mobility function representatives; line managers; HR managers; family members of expatriates (i.e. trailing spouse/partner); and local employees (host country nationals).

### **Time Required and Target Numbers**

We would need access to interview individual stakeholders in your organisation as outlined in the preceding paragraph. Time required would be a one-hour meeting with each stakeholder to tease out the success criteria, with a target of 10-12 participants in each stakeholder cohort across multiple organisations. It would represent a small amount of time out of a manager's daily work schedule. Research would begin in October 2016.

### **Benefits and Value of Participation**

The benefits would be envisaged as follows:

- a. Better tracking of international assignment outcomes, thus enhancing the ROI philosophy and strategic orientation of global mobility.
- b. More effective global mobility policy development and decision making as the views and understandings of assignment stakeholders are considered.
- c. Examining the commonalities and uniqueness of success criteria across stakeholder domains should allow for more inclusive decision making in the process.

### **Project Researcher Profiles**

This research is supervised by Professor Michael Morley, University of Limerick who is widely published in the areas of expatriation, global mobility and cross-cultural management. Researcher profiles are contained in an appendix.

I would be delighted to meet with your organisation to discuss in more detail. I will follow up this communication with a phone call in the next week. Thank you for taking the time to read and consider this.

Sincerely,

Kathryn Brosnan

Kemmy Business School

Schuman Building, S2 - 11, 34

University of Limerick, Limerick

Mob: 353 87 6709199

Email: [kathryn.brosnan@ul.ie](mailto:kathryn.brosnan@ul.ie).

### ***Appendix I – Researcher Profiles***

Researcher profiles are as follows:

#### **Kathryn Brosnan**

Kathryn Brosnan is an experienced HR professional with over twelve years' experience across HR in the areas of Organisation Development, Total Rewards and e-HR across multiple organisations in the IT, Financial Services, Fund Management and FMCG sectors. She is a graduate of the University of Limerick (BBS - HRM & German; MBS HRM) and University College Dublin (PGDE - Business). She is currently a PhD research scholar with the University of Limerick Kemmy Business School. Her research interests lie in expatriate return on investment, global mobility, and global careers.

#### **Professor Michael Morley**

Professor Michael Morley is a member of the editorial board of fifteen international journals, including journals particularly relevant to expatriation (The International Journal of Human Resource Management, Human Resource Management Review, International Journal of Cross-Cultural Management, Leadership and Organization Development). He is a former president (2007-2010) of the Irish Academy of Management and (2013-2014) of the International Federation of Scholarly Associations of Management. He was awarded the University of Limerick's research excellence award on three occasions (1999, 2006 and 2010) and was ranked the number one business scholar in the University of Limerick in an Economic and Social Research Institute (ESRI) 2011 retrospective analysis of the research output of business schools and business scholars in Ireland. He has published extensively in the area of expatriate management. Published books in relation to expatriation include *International Human Resource Management and International Assignments*, (Palgrave Macmillan 2006), *New Directions in Expatriate Research* (Palgrave Macmillan 2006) and *International Human Resource Management, Policy and Practice* (Routledge 2011).

## Appendix E: Stake Listing

Naming Convention NVIVO	Stake					Total
	Expatriate	Repatriate	Global Mobility	Human Resources Function	Line Manager	
Expatriate A	1					1
Expatriate B	1					1
Expatriate C	1					1
Expatriate D	1					1
Expatriate E	1					1
Expatriate F	1					1
Global Mobility A			1			1
Global Mobility B			1			1
Global Mobility C			1			1
Global Mobility D			1			1
Global Mobility E			1			1
Global Mobility F			1			1
Human Resources A				1		1
Human Resources B				1		1
Human Resources C				1		1
Human Resources D				1		1
Line Manager A					1	1
Line Manager B					1	1
Line Manager C					1	1
Repatriate A		1				1

Repatriate B		1				1
Repatriate C		1				1
Repatriate D		1				1
Repatriate E		1				1
Repatriate F		1				1
<b>Total</b>	<b>6</b>	<b>6</b>	<b>6</b>	<b>4</b>	<b>3</b>	<b>25</b>

## Appendix F: Coding Round 2

	Count of Stakeholder Cohort	Column Labels					
	Success Criteria	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Grand Total
1	Achievement of assignment goals and objectives	1		1			2
1	Adjustment	3	1	1		4	9
1	Analytics		1				1
1	Assignment completion				1		1
1	Assignment Refusal		1				1
1	Boundary Spanner			1			1
1	Business benefits			2			2
1	Business Development		2	2			4
1	Business Motives		1				1
1	Business Partnering		1				1
1	Business Value		1			1	2
1	Career	11	10		1	6	28
1	Communication	1	1	3			5
1	Cost		7	2	1		10
1	Cross-Cultural Training	3	2			2	7
1	Cultural Intelligence	7	2	2		5	16
1	Data		1				1
1	Diversity		1		1		2
1	Exit		2		1		3

1	Expatriate Competencies and Skills	5	1			1	7
1	Expatriate Readiness	5		1		2	8
1	Expatriate Visibility	1	1				2
1	Expatriate Work Adjustment			1			1
1	Failure	3	1	1		6	11
1	Family	4		1		2	7
1	Family (Mal)adjustment	3	1				4
1	Feedback		2	2		1	5
1	Gender		1				1
1	Global Mobility Function Motives		1				1
1	Global Mobility Promotion		2				2
1	Global Mobility Value		1				1
1	HR readiness			1		1	2
1	Investment		1				1
1	Knowledge		5				5
1	Knowledge Application		3				3
1	Knowledge Transfer	1	3			4	8
1	Leadership Development	1		1			2
1	Measurement		6				6
1	Mentoring	1	1			1	3
1	Metrics		2				2
1	Mobility Advocates		4	1		1	6
1	Morale		1				1
1	Motives	2	1		1		4
1	Networking	2	3				5
1	New Ideas Generation		1				1

1	Non-work environment				1	6	7
1	Organisational Support	6	4	1		2	13
1	Organisational Support (Family)		1				1
1	Organisational Support (Financial)	5	1	1		1	8
1	Organisational Support (HR Support)		1			3	4
1	Out of Comfort zone		1	1		2	4
1	perceived inequity home v. host	2	1				3
1	Personal Development	1	4	2	1	6	14
1	Personality	9		2		1	12
1	Preview Trip	1	1	2			4
1	Professional Development		1				1
1	Promotion	1	1			1	3
1	Recognition of Success			1			1
1	Regular Check-Ins	1	1			2	4
1	Repatriation Readiness	1	1	2		3	7
1	Repatriation Support		3	2		5	10
1	Repatriation Value		1				1
1	Research		1				1
1	Retention		3	1			4
1	ROI		1				1
1	Safety	4	1				5
1	Strategic global mobility		1				1
1	Success		3				3
1	Supporting Technology		1				1
1	System (Measurement)		1				1
1	Talent Management		3	2			5

1	Team stability		1			1
1	Third Party Relocation Vendors			1		2
1	Value		1			1
1	Social Capital	3			6	9
1	Previous international experience	5	1		2	8
1	Expatriation Willingness				2	2
1	Nature of the role	3			5	8
1	Expatriate Motivation	3			1	4
1	HCN integration	11			3	14
1	Host country location characteristics	3			1	4
1	Repatriate adjustment				2	2
1	Cultural Similarity	2			1	3
1	Life stage	3			2	5
1	Line Manager support	1			2	3
1	Home country networks	2			1	3
1	Timing	1			1	2
1	Organisational Support (Spousal support)				1	1
1	Trust				1	1
1	Coaching				1	1
1	Team Building				1	1
1	Work process improvement	1	1		1	3
1	Knowledge Development	1	1		3	5
1	Cultural Distance				1	1
1	Length of time on assignment	1				1
1	HCN Support	1			3	4
1	Local Support networks	3				3

1	Productivity	1					1
1	Effort	2					2
1	Expatriate Performance	7	1		1	1	10
1	Respect	1					1
1	Organisational Support (informal)	1					1
1	Accommodation	1					1
1	Connectedness To Headquarters	1					1
1	Job Satisfaction	1					1
1	Commitment	1					1
1	Travel	3					3
1	Perceived cultural similarity paradox	1					1
1	Financial Benefits	2					2
1	Internal Company Network	1		1			2
1	Social Media Technology	1					1
1	Adding Value	1					1
1	Reward and Recognition	1					1
1	Global Mobility Policy		7	1			8
1	Pandora's box		1				1
1	Family (Expatriate children)	1				1	2
1	Family Dimension - Trailing spouse career	1				2	3
1	Family Dimension - Teenage Adjustment		1				1
1	Global Mobility Roles		2				2
1	Family Dimension -Moving as a couple	1					1
1	Family Dimension -Trailing Spouse maladjustment					1	1
1	Global mindset	1					1

<b>1</b>	<b>Family Dimension - Spousal Maladjustment</b>	<b>1</b>					<b>1</b>
<b>1</b>	<b>Family Dimension - loss of spousal income</b>					<b>1</b>	<b>1</b>
<b>1</b>	<b>Documentation - Paperwork</b>	<b>3</b>				<b>4</b>	<b>7</b>
<b>1</b>	<b>Happiness on assignment</b>	<b>2</b>				<b>1</b>	<b>3</b>
<b>1</b>	<b>Family skillset for success</b>	<b>1</b>					<b>1</b>
<b>1</b>	<b>Employee Engagement</b>			<b>1</b>			<b>1</b>
<b>1</b>	<b>Sense of Achievement</b>	<b>1</b>					<b>1</b>
<b>129</b>	<b>Grand Total</b>	<b>167</b>	<b>130</b>	<b>44</b>	<b>9</b>	<b>122</b>	<b>472</b>

### Appendix G: Coding Round 3

	Count of Stakeholder Cohort	Column Labels					
	Success Criteria	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Grand Total
1	Achievement of assignment goals and objectives	1		1			2
1	Adding Value	1	2				3
1	Adjustment	4	1	2		6	13
1	Assignment Completion				1		1
1	Assignment Refusal		1				1
1	Boundary Spanner			1			1
1	Business Return		6	5		1	12
1	Coaching					1	1
1	Commitment	1					1
1	Communication	1	1	3			5
1	Connectedness To Headquarters	1					1
1	Cost		8	2	1		11
1	Cross-Cultural Training	3	2			2	7
1	Cultural Distance					1	1
1	Cultural Intelligence	7	2	2		5	16
1	Cultural Similarity	2				1	3
1	Diversity		1		1		2
1	Documentation - Paperwork	3				4	7
1	Effort	2					2

1	Employee Engagement			1			1
1	Exit		2		1		3
1	Expatriate Competencies and Skills	6	1			1	8
1	Expatriate Motivation	5	1			1	7
1	Expatriate Performance	8	1		1	1	11
1	Expatriate Readiness	5		1		2	8
1	Expatriate Visibility	1	1			1	3
1	Expatriation Willingness					2	2
1	Failure	3	1	1		6	11
1	Family Dimension	12	2	1		7	22
1	Feedback		2	1		1	4
1	Financial Benefits	2					2
1	Global Mobility Policy		7	1			8
1	Global Mobility Promotion		2				2
1	Global Mobility Roles		2				2
1	Happiness	2				1	3
1	HCN integration	11				3	14
1	HCN Support	1				3	4
1	Home Country Networks	2				1	3
1	Host country location characteristics	3				1	4
1	HR Readiness			1		1	2
1	Internal Company Network	2		1			3
1	Knowledge Development, Transfer and Application	2	12			7	21
1	Leadership Development	1		1			2
1	Length of time on assignment	1					1

1	Life stage	3					3
1	Line Manager Support	1				2	3
1	Local Support networks	3					3
1	Measurement		14				14
1	Mentoring	1	1			1	3
1	Mobility Advocates		4	1		1	6
1	Motives				1		1
1	Nature of the role	4				5	9
1	Non-Work Environment				1	6	7
1	Organisational Support	12	7	2		7	28
1	Out of comfort zone		1	1		2	4
1	Perceived cultural similarity paradox	1					1
1	perceived inequity home v. host	2	1				3
1	Personal Development	1	4	2	1	6	14
1	Personality	9		2		1	12
1	Preview Trip	1	1	2			4
1	Previous international experience	5	1			2	8
1	Professional Development		1				1
1	Promotion	1	1			1	3
1	Recognition of Success			1			1
1	Regular Check-Ins	1	1			2	4
1	Repatriation Readiness	1	1	2		3	7
1	Repatriation Support		3	2		5	10
1	Respect	1					1
1	Retention		3	1			4
1	Reward and Recognition	1					1

<b>1</b>	<b>ROI</b>		<b>1</b>				<b>1</b>
<b>1</b>	<b>Sense of Achievement</b>	<b>1</b>					<b>1</b>
<b>1</b>	<b>Social Capital</b>	<b>5</b>	<b>3</b>			<b>6</b>	<b>14</b>
<b>1</b>	<b>Strategic global mobility</b>		<b>3</b>				<b>3</b>
<b>1</b>	<b>Success</b>		<b>3</b>				<b>3</b>
<b>1</b>	<b>Talent Management</b>		<b>3</b>	<b>2</b>			<b>5</b>
<b>1</b>	<b>Teamwork</b>		<b>1</b>			<b>1</b>	<b>2</b>
<b>1</b>	<b>Third Party Relocation Vendors</b>			<b>1</b>		<b>1</b>	<b>2</b>
<b>1</b>	<b>Timing</b>	<b>1</b>				<b>1</b>	<b>2</b>
<b>1</b>	<b>Travel</b>	<b>3</b>					<b>3</b>
<b>1</b>	<b>Work process improvement</b>	<b>1</b>	<b>1</b>			<b>1</b>	<b>3</b>
<b>1</b>	<b>(blank)</b>		<b>1</b>				<b>1</b>
<b>1</b>	<b>Safety and Security</b>	<b>4</b>	<b>1</b>				<b>5</b>
<b>1</b>	<b>Career Capital</b>	<b>11</b>	<b>10</b>		<b>1</b>	<b>6</b>	<b>28</b>
<b>1</b>	<b>Readiness</b>					<b>2</b>	<b>2</b>
<b>85</b>	<b>Grand Total</b>	<b>167</b>	<b>129</b>	<b>44</b>	<b>9</b>	<b>122</b>	<b>471</b>

## Appendix H: Success Criteria Themes by Stakeholder Round 4

### International Assignment Success Criteria by Stakeholder

Success Criteria	Stakeholders					
	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Total
<b>Organisational Support</b>	12	7	2		7	28
Organisational Support (HR Support)						
Organisational Support (Financial)						
Organisational Support (Family)						
Organisational Support (Spousal Support)						
Financial Benefits	2					2
Organisational Support (informal)						
Repatriation Support		3	2		5	10
Cross-Cultural Training	3	2			2	7
Safety and Security	4	1				5
Third Party Relocation Vendors			1		1	2
Preview trip	1	1	2			4
Documentation - Paperwork Assistance	3				4	7
<b>Career Capital</b>	11	10		1	6	28
Career Development						
Career Progression						

Success Criteria	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Total
Wobble						
Career Support upon Repatriation						
Promotion	1	1			1	3
<b>Family Dimension</b>	12	2	1		7	22
Family (mal)adjustment						
Trailing Spouse (mal)adjustment						
Trailing Spouse Career						
Moving as a couple						
Loss of spousal income						
Family skillset for success						
<b>Knowledge Development, Transfer and Application</b>	2	12			7	21
Knowledge						
Knowledge Development						
Knowledge Transfer						
(Lack of) Application of knowledge						
<b>Cultural Intelligence</b>	7	2	2		5	16
Cultural Similarity	2				1	3
Cultural Distance					1	1
Perceived cultural similarity paradox	1					1
<b>Host Country National Integration</b>	11				3	14

Success Criteria	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Total
Host Country National Support	1				3	4
Host country location characteristics	3				1	4
Perceived inequity home v. host	2	1				3
<b>Measurement of Assignment Success</b>		14				14
Failure	3	1	1		6	11
Cost		8	2	1		11
ROI		1				1
Value	1	2				3
Exit		2		1		3
Success		3	1			4
Assignment Refusal		1				1
<b>Expatriate Development</b>						
Personal Development	1	4	2	1	6	14
Professional Development		1				1
Expatriate Competencies and Skills	6	1			1	8
Travel	3					3
Sense of Achievement	1					
Mentoring	1	1			1	3
Coaching					1	1
Leadership Development	1		1			2
Respect	1					1
Expatriate Visibility	1	1			1	3

Success Criteria	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Total
<b>Social Capital</b>	5	3			6	14
Home Country Networks	2				1	3
Internal Company Network	2		1			3
Local Support networks	3					3
Boundary Spanner			1			1
Connectedness To Headquarters	1					1
<b>Adjustment</b>	4	1	2		6	13
Expatriate Adjustment						
Repatriate Adjustment						
Family Adjustment						
Out of comfort zone		1	1		2	4
Happiness	2				1	3
Effort	2					
Non-Work Environment				1	6	7
<b>Business Value and Return</b>		6	5		1	12
Work process improvement	1	1			1	3
Teamwork		1			1	2
Business Development						
<b>Personality of the Expatriate</b>	9		2		1	12

Success Criteria	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Total
<b>Expatriate Performance</b>	8	1		1	1	11
Achievement of assignment goals and objectives	1		1			2
Assignment Completion				1		1
Employee Engagement			1			1
Commitment	1					1
<b>Role Dimension</b>	4				5	9
Role similarity						
Demotion						
Job Satisfaction						
<b>Readiness</b>						
Expatriate Readiness	5		1		2	8
Repatriation Readiness	1	1	2		3	7
HR Readiness			1		1	2
Motivation	5	1		1	1	8
Willingness					2	2
<b>Global Mobility Function Effectiveness</b>						
Global Mobility Policy		7	1			8
Strategic Orientation of global mobility		3				
Global Mobility Roles		2				
Global Mobility Promotion (Branding)		2				2

Success Criteria	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Total
Mobility Advocates		4	1		1	6
<b>Expatriate Characteristics</b>						
Life stage	3					3
Timing	1					1
Length of time on assignment	1					1
<b>Previous International Experience</b>	5	1			2	8
<b>Timely Communication and Feedback</b>						
Regular Check-Ins	1	1			2	4
Communication	1	1	3			5
Feedback		2	1		1	4
<b>Retention</b>		3	1			4
<b>Talent Management</b>		3	2			5
Pool						
Diversity		1		1		2
Reward and Recognition	1					1
<b>Line Manager Support</b>	1				2	3
<b>Total</b>	<b>167</b>	<b>128</b>	<b>44</b>	<b>9</b>	<b>119</b>	<b>459</b>

**Appendix I: Enablers and Outcomes by Stakeholder Final**

**International Assignment Success Criteria by Stakeholder**

Success Criteria	Enabler/ Outcome	Stakeholders					Total
		Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	
<b>Organisational Support</b>	<b>Enabler</b>	12	7	2		7	28
Organisational Support (HR Support)							
Organisational Support (Financial)							
Organisational Support (Family)							
Organisational Support (Spousal Support)							
Financial Benefits		2					2
Organisational Support (informal)							
Repatriation Support			3	2		5	10
Cross-Cultural Training		3	2			2	7
Safety and Security		4	1				5
Third Party Relocation Vendors				1		1	2
Preview trip		1	1	2			4
Documentation - Paperwork Assistance		3				4	7
<b>Career Capital</b>	<b>Outcome</b>	11	10		1	6	28
Career Development							
Career Progression							
Wobble							
Career Support upon Repatriation							

Success Criteria	Enabler/ Outcome	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Total
Promotion		1	1			1	3
<b>Family Dimension</b>	<b>Enabler</b>	12	2	1		7	22
Family (mal)adjustment							
Trailing Spouse (mal)adjustment							
Trailing Spouse Career							
Moving as a couple							
Loss of spousal income							
Family skillset for success							
<b>Knowledge Development, Transfer and Application</b>	<b>Outcome</b>	2	12			7	21
Knowledge							
Knowledge Development							
Knowledge Transfer							
(Lack of) Application of knowledge							
<b>Cultural Intelligence</b>	<b>Enabler &amp; Outcome</b>	7	2	2		5	16
Cultural Similarity		2				1	3
Cultural Distance						1	1
Perceived cultural similarity paradox		1					1

Success Criteria	Enabler/ Outcome	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Total
<b>Host Country National Integration and Buy-in</b>	<b>Enabler &amp; Outcome</b>	11				3	14
Host Country National Support		1				3	4
Host country location characteristics		3				1	4
Perceived inequity home v. host		2	1				3
<b>Measurement of Assignment Success</b>	<b>Contextual Issue</b>						
Failure							
Cost							
ROI							
Value							
Exit							
Success							
Assignment Refusal							
<b>Development</b>	<b>Outcome</b>						
Personal Development		1	4	2	1	6	14
Professional Development			1				1
Expatriate Competencies and Skills		6	1			1	8
Travel							
		3					3

Success Criteria		Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Total
Sense of Achievement		1					
Mentoring		1	1			1	3
Coaching						1	1
Leadership Development		1		1			2
Respect		1					1
Expatriate Visibility		1	1			1	3
<b>Social Capital</b>	<b>Outcome</b>	5	3			6	14
Home Country Networks		2				1	3
Internal Company Network		2		1			3
Local Support networks		3					3
Boundary Spanner				1			1
Connectedness To Headquarters		1					1
<b>Adjustment</b>	<b>Outcome</b>	4	1	2		6	13
Expatriate Adjustment							
Repatriate Adjustment							
Family Adjustment							
Out of comfort zone			1	1		2	4
Happiness		2				1	3
Effort		2					
Non-Work Environment					1	6	7
<b>Business Value and Return</b>	<b>Outcome</b>		6	5		1	12

Success Criteria	Enabler/ Outcome	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Total
Work process improvement		1	1			1	3
Teamwork			1			1	2
Business Development							
<b>Personality</b>	<b>Enabler</b>	9		2		1	12
<b>Performance</b>	<b>Outcome</b>	8	1		1	1	11
Achievement of assignment goals and objectives		1		1			2
Assignment Completion					1		1
Employee Engagement				1			1
Commitment		1					1
<b>Role Dimension</b>	<b>Outcome</b>	4				5	9
Role similarity							
Demotion							
Job Satisfaction							
<b>Readiness</b>	<b>Enabler</b>						
Expatriate Readiness		5		1		2	8
Repatriation Readiness		1	1	2		3	7
HR Readiness				1		1	2
Motivation		5	1		1	1	8
Willingness						2	2

Success Criteria	Enabler/ Outcome	Expatriate	Global Mobility	Human Resources	Line Manager	Repatriate	Total
<b>Global Mobility Function Effectiveness</b>	<b>Contextual Issue</b>						
Global Mobility Policy							
Strategic Orientation of global mobility							
Global Mobility Roles							
Global Mobility Promotion (Branding)							
Mobility Advocates							
<b>Characteristics</b>	<b>Enabler</b>						
Life stage		3					3
Timing		1					1
Length of time on assignment		1					1
<b>Previous International Experience</b>	<b>Enabler</b>	5	1			2	8
<b>Timely Communication and Feedback</b>	<b>Enabler</b>						
Regular Check-Ins		1	1			2	4
Communication		1	1	3			5
Feedback			2	1		1	4
<b>Retention</b>	<b>Outcome</b>		3	1			4
<b>Talent Management</b>	<b>Enabler</b>		3	2			5
Pool							
Diversity			1		1		2

<b>Success Criteria</b>	<b>Enabler/ Outcome</b>	<b>Expatriate</b>	<b>Global Mobility</b>	<b>Human Resources</b>	<b>Line Manager</b>	<b>Repatriate</b>	<b>Total</b>
Reward and Recognition		1					1
<b>Line Manager Support</b>	<b>Enabler</b>	1				2	3
<b>Total</b>		<b>163</b>	<b>78</b>	<b>38</b>	<b>7</b>	<b>112</b>	<b>395</b>