

# Constraining and contributing factors of an expatriate assignment life cycle



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**Orientation:** Globalisation necessitated the physical movement of talented employees, leading to expatriate assignments to foreign countries. Investigative studies and strategy development were needed to moderate the high failure rate of such assignments.

**Research purpose:** To explore the constraining and contributing factors of an expatriate assignment lifecycle.

**Motivation for the study:** With only 40% of assignments being successful, there is an urgent need to find and rectify the reasons for the failure in order to mitigate the associated financial losses and threatened sustainability of businesses.

**Research approach, design and method:** A qualitative research methodology within an exploratory research design was used. The opinions of the expatriates were compared using subjective, interpretivist and phenomenological dimensions.

**Main findings:** Based on the lived experience of the expatriates, the constraining factors were a lack of training and mentoring, inadequate cultural acclimatisation, ambiguous policies, unsupportive host organisation, low-quality logistics support and ineffective re-induction of the expatriates into the home country. The expatriates strongly consider career path planning, effective ongoing training and mentoring, a caring organisational culture, clear assignment policies and social relations to be decisive contributing factors.

**Practical and managerial implications:** The international human resource management process can use the findings to reduce the global assignment failure rates. It provides clear directions for driving relevant strategies and processes for successful expatriation operations.

**Contribution:** The study contributes to the existing body of knowledge on the constraining and contributing factors of the expatriate assignment. It sets a course to initiate further studies to evolve a sustainable framework for an efficient global mobility programme.

**Keywords:** Constraining factors; contributing factors; expat life cycle; multinational enterprise; qualitative research.

## Introduction

Increasing globalisation in today's business environment has significantly impacted the internationalisation of companies (Hooi, 2022). Cascio and Aguinis (2018) explain expatriation as the process where while being on the payroll of a multinational enterprise (MNE), people move or are moved from one country to another and are known as corporate-assigned expatriates (CAEs) in the host countries. The current study focuses on CAEs.

However, many expatriate assignments are susceptible to failure or premature terminations (Maurer, 2013). Unsuccessful assignments are a huge financial drain on the expatriate and the MNEs (McNulty & Brewster, 2017).

The financials per contract can work out between US \$250 000 to US \$1 000 000 or even more, subject to the variabilities of the company, job role, country of repatriation and assignment period (Nowak & Linder, 2016).

Development and initiation of any international human resource management (IHRM) strategy focused on improving the success of international assignments must consider the contributing and constraining factors during an assignment life cycle framework in a multinational enterprise.

This included a focus on the 'lived experience' of the participants. Identification and discussions of the contributing and constraining factors will clarify the challenge and help lead to a sustainable and effective global mobility solution.

To understand expatriate performance management (EPM) in more depth, future research could consider the whole cycle of expatriation, considering items such as goal setting and training prior to the expatriate assignment and/or feedback and career development after the expatriation assignment (Bader et al., 2021).

## Research problem and aim

Various studies have been conducted on the three-phase expatriate cycle of developing global human resources (Hooi, 2022), but limited research on the contributing and constraining factors of each phase is available. This study aims to address this research gap by uncovering the expatriate's perceptions of contributing and constraining factors based on their lived experience during various global assignments. This study will contribute to developing a robust IHRM policy aimed at mitigating assignment failure rates.

## Literature review

Multinational enterprises that operate in multiple institutional contexts have an expansive organisational structure and source and sell products and services in diverse markets (George & Schillebeeckx, 2022). The international expatriate assignment is one of the significant operations of the IHRM, wherein the assignee has to substantially adapt both physically and emotionally to confront the stiff challenges they face in a new culture, work and social environment and changed family settings to deliver to the expectations of the task and organisation (Bader et al., 2019). Furthermore, the CAEs are also obliged to share their expertise and train local talent during the assignment (Javidan et al., 2010).

A series of challenges are encountered well before the expatriation commences and continue beyond the expatriation process (Collings et al., 2011). They necessitate an appropriate focus on all stages of expatriation.

### The global assignment life cycle

According to Mossmann (2016), the global assignment life cycle has some steps that can be essentially built into the following three phases:

- The pre-assignment phase includes recruitment, selection and preparation for the career and physical relocation of the assignee.
- The across-assignment phase is the actual work period in the host company until completing the job or assignment.
- The repatriation or postassignment phase involves the timely preparation and support of assignees on returning home after successfully completing the assignment. Postassignment settlement is also a part of this stage.

## Pre-assignment phase

The selection, recruitment and preparation of assignees before their departure to the host country mark the pre-assignment phase.

Specific personal characteristics, such as adaptability to diverse conditions, behaviour and cultures; ability to work under stress; high tolerance for ambiguity; open-mindedness; patience; work ethic; independence; flexibility; creativity; self-confidence; attitude; and self-motivation seem compulsory to have for the proposed assignee (Abdullah & Jin, 2015). In addition, extraversion, amicability, emotional stability, openness, conscientiousness and intellect are also crucial features to look for in the assignee.

Guðmundsdóttir and Eðvarðsdóttir (2017) argue that neglect of leadership skills and organisational sensitivity and overstress on professional expertise might lead to failure of the assignment. The external recruitment process may involve the scrutiny of the biographical and other personal details, along with proof of expertise and experience and a thorough background check (Guðmundsdóttir & Eðvarðsdóttir, 2017). The major constraining factors in the pre-assignment stage of global assignments are inadequate training and development and low-quality logistics support (Koleša, 2021).

An exploratory visit to the host country with the family helps the assignee assess compatibility and builds confidence for the transition. Once appointed, the assignee may need technical and logistical assistance in immigration paperwork, the international relocation process and the sale of their home, furniture storage in the home country, tax advice and settlement preparations in the foreign country (O'Byrne, 2018). Other issues that need support and attention before settling in the host country are long-stay accommodation; transportation in the host country; children's schooling; banking, rates and taxes; social security issues; and health insurance (McNulty & Brewster, 2017).

O'Byrne (2018) also observes that it helps the family interact with host-country nationals, overcome language barriers and navigate social, political and religious differences. The various organisations may judge the person's suitability for the assignment differently. In conclusion, the literature suggests effective and ongoing training to enhance relevant work skills and adaptation to the new culture, as well as personalised mentoring to navigate through sociocultural challenges, to resolve the impediments of the pre-assignment stage successfully (Wortland, 2018).

## Across-assignment phase

The across-assignment phase refers to the period that includes the assignee's arrival in the foreign country and lasts until the completion of the contract before departure. It has been observed that during the assignment phase, ambiguous policies and an indifferent or unsupportive organisation can

severely demotivate the expatriate and lead to the undesirable termination of the assignment (Morris, 2020).

The support and encouragement received by the assignee during the assignment greatly influence his or her efficiency and adaptability to the new work environment. Job performance and satisfaction relate strongly to perceived organisational support (POS), social and professional networks and a caring organisation culture (Chen & Shaffer, 2017). Perceived organisational support includes a combination of motivators called financial POS, career POS and adjustment POS. Financial POS concerns monetary rewards and compensation and employment benefits like home leave, assignment bonuses, stipends, the cost of living and financial support for schooling, accommodation and other utilities (Kraimer et al., 2016).

## Repatriation

Breitenmoser and Bader (2016) explain repatriation as returning home after successfully completing the assignment, and it signifies the last phase of the assignment life cycle. It involves all the preparations and processes initiated by the expatriate and the IHRM for the journey back home (Baruch et al., 2016). With offshore experience and newly acquired skills, repatriates anticipate a secure, lucrative and appropriate position in their home country. The repatriation process is also stressful for the employee, and the family and information and education campaigns are therefore essential (Komakech & Orach, 2022). The assignee and family must be retrained for postrepatriation.

It is the responsibility of the HRM to resettle the expatriate back into the home country on completion of the assignment, if he or she is not re-assigned to other international projects (Breitenmoser & Bader, 2016). The high turnover within a year of repatriation is significant because of the gap between the repatriates and the company's expectations and offers (Chen & Shaffer, 2017; Naude & Vögel, 2018). It can be deduced from the literature that progressive career path planning, which includes postassignment engagement, can significantly reduce career anxiety and retain experienced talent in the organisation for a longer duration (Molinsky & Hahn, 2016).

## Research design

Implementing appropriate methods and processes and accurate data collection and analysis establishes an efficient research design and strategy (Flick, 2011). The research methodology employed for this study aligns with the research problem, aim and objectives, ontology and epistemology. The subjective research approach is based on the belief that multiple realities exist in the world of knowledge. Hence, an interpretivist epistemology was the most suitable in the context.

Some of the most relevant social research designs adopted are descriptive, explanatory and exploratory, of which an

exploratory research design was used in this study (Bless et al., 2013). Exploratory qualitative research aids effective cognition regarding unexplored areas of experiences (Cavana et al., 2001; Marshall & Rossman, 2006). Exploratory research necessitates an in-depth examination of the research problem to determine the scope, outcome and application. Typically, inductive research is applied to explore and discover data about specific aspects of the topic. Therefore, the exploratory research design was accepted to be the most appropriate for the current study.

## Research approach

The approach revolves around a qualitative research philosophy in which words and descriptions describe crucial global mobility aspects. The text was further coded and classified to direct the interpretation and construction of a new theory on the research topic, as employed by Bryman and Bell (2015).

## Research strategy

The research strategy starts with the relevant literature review. Further information will be disseminated about the research population, sample and sampling methods. It is followed by clarifying data collection techniques and tools (O'Gorman & MacIntosh, 2015). The discussion will also follow on the limitations of the research and data integrity. Finally, the ethical approach will conclude this section.

The qualitative study at hand used inductive inquiry and reasoning to discover and build on current research about contributing and constraining factors of global assignment. Inductive inquiry continuously compares the collected data with the existing theories to deduce new meanings and perspectives. An iterative data collection, comparison and interpretation process determined the research findings (Bryman & Bell, 2015; Neale, 2016).

## Research methodology

The research methodology consists of the research setting, sampling, data collection methods, data analysis and authenticity of data.

## Research setting

The research environment for this study is the 22 affiliates of a MNE across Africa and the Middle East. The target population comprises all units that meet the inclusion criteria in the research project (Burns & Grove, 2016). The target population included all expatriates across the 22 ecosystems of the multinational company for which the researcher worked. However, the large population size, as stated by Babbie (2013), prohibits including all of them in the research.

## Research participants and sampling methods

A mixed sample of 50 expatriates from finance, administration, technical and human resources (HR) domains represented

the target population. To ensure systematic global coverage, employees who had served in the past as expatriates were also included. The researchers adopted a nonprobability sampling technique, namely purposive sampling, to select the most suitable participants for collecting data. Purposeful sampling is widely used in qualitative research for the identification and selection of information-rich cases related to the phenomenon of interest (Staller, 2021). Belonging to different origins, ages and genders, the participants were from South Africa, Nigeria, Benin, Afghanistan, Ghana, Cameroon, Guinea Bissau, South Sudan and Uganda. Furthermore, the participants were unaware that some of their fellow expatriates were invited to the e-mail interviews. This way, they could not influence each other before or during the 3-month data collection period. No prediscussion of invitations and the e-mail interview content could be detected.

### Data collection methods

E-mail interviews were employed to collect relevant data. Through an e-mail interview, online information is collected by the researcher within a specified timeframe (Ratislavová & Ratislav, 2014). A semistructured e-mail interview where the questions started at a specific point, following the structure of the assignment life cycle, gave the participants a choice to either alter or add to their answers before returning the e-mail, as suggested by Bryman and Bell (2015) and Babbie (2013). Open-ended questions to obtain information about the contributing and constraining factors of the pre-assignment, across-assignment and repatriation phases were posed. Data saturation was reached after the 24th e-mail interview when no more e-mails were returned, and no new data could radically change the research outcome. This measure helped prevent irrational data from affecting the results.

### Strategies employed to ensure data quality and integrity

The trustworthiness of the data was ensured by taking the following steps.

#### Credibility:

- purposive selection of participants who have the experience and insights in providing valid data
- iterative questioning in data collection
- member checks of data collected and interpretations.

#### Confirmability:

- memoing during data analysis, particularly in coding
- reflective journaling during the research process
- use of evidence to demonstrate 'audit trail'.

#### Dependability:

- reflexive journal focusing on an expatriate life cycle
- e-mail-style interviews with purposively selected participants.

#### Transferability:

- reporting thick description of the context
- transferability is limited in this qualitative study because of contextual aspects.

### Data analysis

Data analysis gives order, structure and meaning to the body of raw data. It further provides perspective to the research design and develops an organised, detailed, plausible and transparent account of the meaning of data (Groenewald, 2019). Thematic analysis, a qualitative method of analysing qualitative data, such as text and interview scripts, was employed. It identifies, analyses and interprets patterns of meaning or themes and can be used to analyse large qualitative sets of data by research teams (Nowell et al. 2017). The inductive inquiry approach was used to articulate the collected data in the form of opinions and recommendations from different research sources. The different data sets were subjected to continuous comparison and analysis of the content to either create a new theory or reject data that did not contribute to the content. Hand-coding was used to analyse the data. Inductive (new codes) and deductive (codes derived from the literature review) were used to code the data. The process of coding continued until themes emerged from the data. The six data analysis phases discussed by Braun and Clarke (2006) were adopted to analyse the data:

- becoming accustomed to the raw data
- generating initial codes
- searching for themes against the codes
- reviewing the themes
- identifying and naming themes
- interpreting the meaning of themes.

### Presentation of findings

The participants' responses and their opinions about the contributing and constraining factors in global assignments are presented here. For better comprehension and analysis, the participants have been thematically categorised into constraining and contributing factors, which are further subdivided into pre-assignment, across-assignment and postassignment stages.

Based on the phases and the themes therein, the findings will lead to a better and more detailed understanding of the constraining and contributing factors experienced by the expatriates during their respective assignments.

### Constraining factors of an expatriate life cycle

One of the interview questions was: 'In your opinion, what are the constraining factors to completing an assignment successfully?' The reply to this question was categorised into various themes, as described below, relevant to different stages of the global assignment project.

#### Pre-assignment

The participants' experience also indicates that the significant constraining factors during the pre-assignment phase are

insufficient training, inadequate mentoring, deficient cultural acclimatisation when outside their regional frame of reference and substandard logistics and relocation assistance.

The analysis and interpretation of data presented were in response to the question included in the pre-assignment phase – ‘Tell me more about your problems experienced before starting your job in the new country (if any), and your experience of the company’s human resources support’. The received responses can be categorised into the following five themes.

### **Theme: A lack of training and mentoring**

Several expatriates felt that the pre-assignment was a rushed affair for them. Either the exploratory opportunity was not offered to them, or it was focused purely on the acquaintance of company matters rather than addressing any personal needs. The training was very elementary and nominal, devoid of any mentoring, pre- or postdeparture.

For participant P18, the first expatriation assignment was satisfactory, but for the second case the comments were: ‘The second assignment I received no assistance from either Group HR or the receiving subsidiary’.

The need for training and mentoring was evident, as many participants indicated that they needed more assistance. There was also a lack of attending to the personal matters of the participants. Many questions, uncertainties and fears led to the participants wanting personal guidance to better prepare themselves for the assignment.

Participant P6 commented on personal matters not being the key focus of the visit: ‘The look-and-see more focused on company matters than personal matters’.

### **Theme: A lack of technical support**

The issuance of work permits and visas, essential to the expatriation process, was not handled well and was a reason for stress to some expatriates. Frustrations and demotivation were results of this lack of technical support.

The personal experience of participant P1 was expressed as:

‘The main problem we faced was the issuing visa and work permit which caused a long delay and made it very difficult for myself and my family as we were waiting for 7 months without a clear reason for that delay.’ (P1, Male, 42, Cameroon, Assignment Tenure, 19 Months)

Relationships with relevant stakeholders are of the essence in order to produce proper support in the pre-assignment phase. It seems like governments need to step up in order to assist expatriates to successfully prepare for their assignments and not rely on third parties to obtain the work permits.

Participant P7’s exasperation on the issue was obvious when expressed as:

‘The work permit issuance process is a nightmare. We are at the mercy of the Government, and unlike other OPCOs, where ...

has good and deep relations with the Government ... does not have such relationships and depends on third party agencies whose capabilities are limited in delivering the experience and expediting the work permit process.’ (P7, Male, 38, South Sudan, Assignment Tenure, 20 Months)

### **Theme: A lack of logistics support**

To successfully adjust, the expatriates felt that they were not properly assisted. Housing and schooling were major concerns for the expatriates during the assignment, and these aspects were not up to their expectations.

Participant P10 was direct in his reply:

‘We have faced challenges related to schooling, housing and relocation sequencing. Initially it was required that I had to relocate first whilst my family would join later. This caused unnecessary stress to my family as it created uncertainty and an additional burden for my wife to live and travel alone with the kids. HR would have to play an important part but unfortunately there was no support provided in finding housing, school and arranging the most suitable logistics. Every step was in relocation was like a battle with HR.’ (P10, Female, 45, South Africa, Assignment Tenure, 12 months)

Human resources must play an important role in assisting expatriates in the pre-assignment phase. The lack of HR support during this phase led to the expatriates being demoralised and stressed. Expatriates indicated that this is not acceptable. Specific HR support is needed in terms of accommodation, finding schools for the children and other logistics.

### **Theme: A lack of caring organisation structure**

The general impression that prevailed based on the e-mailed responses was of an unempathetic and uncaring organisation when it came to onboarding, induction and adequate resources. The expatriates indicated that they were uncertain about settling in a new country and that they thought that HR was going to assist them. Unfortunately, there was a lack in how the organisation was structured, and even worse was the fact that HR did not have empathy:

‘The initial onboarding process is not very friendly and the HR support team sometimes don’t understand that things which are normal for them may not be normal for someone who is joining in a new country.’ (P3, Male, 44, Uganda, Assignment Tenure, 6 months)

Many of the expatriates had to seek help elsewhere, as the HR team did not assist them with induction and the necessary advice. As part of the pre-assignment phase, it is important to note that it is the responsibility of the organisation to properly assist expatriates. Colleagues can be used for advice, but it remains HR’s obligation to prepare and assist the expatriates.

‘There was no induction process or opportunity to walk me through settling into a new country and had to seek advice from colleagues who had previously moved’ was participant P11’s observation.

## Across-assignment

While working or just beginning to work in the host country, the major stressors experienced by the expatriates were ambiguous assignment policy, a lack of continued training and associated support and an unaccommodating and disconfirming organisation. Addressing these sore points can help the IHRM reduce the failure rates of global assignments.

The participants were asked to reply to the question, 'During your assignment phase – what have you found contributed to success or unhappiness?'

The factors contributing to the success have been discussed under the heading of contributing factors at the end of this section.

### Theme: A lack of mentoring and training

Even during the assignment, there was a need for continuous training and mentoring for the expatriate and the family. It helps manage the expectations of both the organisation and the family. Brief information sessions are not helpful. Rigorous information sessions, training, development and mentoring should be offered to the expatriates and their families to ensure a successful transition to the other country. Feedback and open discussion between the assignee and expatriate management must be ensured. The spouses of the expatriates also need specific attention and guidance.

Participant P5 had a relevant comment on this: 'I think the once off family briefing did not help the family much. In hindsight, I think spouses need bit more counselling sessions to manage expectations'.

Job and work environment factors, family factors, organisational support and contextual factors in the host country must be attended to during the assignment phase. Support and unambiguous communication are essential during the assignment phase. On a personal level, there needs to be an understanding from the organisation. Diversity training is another element that needs to be properly addressed. Training and mentoring strategies seem to be an important part to assist the expatriates with adapting in the new country.

Participant P16 felt that being an expatriate seemed like a liability for the nation and communication was a real challenge and observed that:

'The difficulties always emerged when there was no support from the Group and the conflicting messages about events. Understanding the psyche of the nationals had its influence on one's survival. The diversity was real and needed to be understood in order to progress. I got to understand that being an expatriate was a liability to the nationals and strategies were required to ease the discomfort.' (P16, Male, 39, South Sudan, Assignment Tenure, 11 Months)

### Theme: A lack of assignment policy

The lack of an assignment policy was one of the serious stressors experienced during the course of the assignment.

Ambiguous, unfriendly and vague assignment policies were found to be a severe stressor for a good number of expatriates.

Participant P3 commented:

'Also on an assignment with ... you never fully understand what are your benefits and these things always you understand as you spend time and discuss things with other expats then you get to find out that you are actually entitled to some benefit so basically it is not well documented for an expat what are his overall benefits both from the group or local OPCO [*operating company*].' (P3, Male, 44, Uganda, Assignment Tenure, 6 months)

Clear communication about the salary and employment benefits is therefore essential. The employment contract therefore needs to be updated and comprehensive and not a generic version to all expatriates. Contract negotiations and consultations are also important or else the expatriates may feel that they are left in the dark and treated unfairly. This may lead to a high turnover rate and a huge loss for the organisation. Human resources therefore needs to ensure that all the relevant policies, contracts and documents are in place in order to ensure expatriate success and retention. Fair and objective treatment regarding contract renewal and other relevant documents is of utmost importance.

Participant P2's displeasure was very evident from his reply:

'Latest Expat policy changes came into effect without proper consultation. Although the OPCO motivated for the need of my extension, the HCC [*head of corporate communications*] rejected their motivation and no extension was granted. I feel I was unfairly treated and will most probably have to leave ... employment.' (P2, Male, 43, South Africa, Assignment Tenure, 23 Months)

## Repatriation

The participants shared their concerns and stress when asked: 'What are or were your greatest concerns when having to return to your home office and country?'

The corresponding e-mail replies confirmed the findings of the literature, wherein the major dissatisfaction was concerning the uncertainty of career postassignment and poor re-induction of the expatriates in the home country.

### Theme: Uncertainty

During the course of expatriation, a sense of uncertainty bothered the assignees, who were unsure about the renewal of their contracts. The unfair treatment and bias during the repatriation phase caused stress and anxiety among the expatriates and their families. Open and transparent conversations between the expatriates, HR and management are needed in order to ensure successful a repatriation phase.

Participant P11 found the renewals to be biased: 'Renewal of contracts was also subjective and biased'. Meanwhile,

participant P13 was clearly stressed out because of the uncertainty, as seen from his reply:

'Sources of unhappiness are always the stress and anxiety that happen before you need to move again and after establishing roots in a country'. (P11, Male, 39, Uganda, Assignment Tenure, 11 Months)

### Theme: Job availability

The limited job opportunity and uncertainty of finding a suitable job back home was a serious concern shared by most expatriates, reflecting poorly on their performance:

'It's finding a vacant role wherein you can commence work on your return. Since in ... you lose your role when you go on an assignment that means you lose job security when you take up an assignment. That's the biggest concern. I have seen people wandering around in the office not knowing what to do.' (P5, Male, 41, Nigeria, Assignment Tenure, 8 Months)

Stress and strain were caused because of finding work in the country after repatriation. A lack of social networks because of the overseas assignment may lead to difficulty in finding work again. The pool in which expatriates are placed also causes considerable stress. Going back into the expatriate pool knowing that only 3 months are allocated to secure a job within the organisation was one of the most dreaded experiences every assignee went through. Job availability should therefore have already been discussed towards the end of the assignment and not only when the expatriate manager arrived in the country:

'The main concern is the ability to find a job within ... and because you have been out of the country you have lost your social networks and it is not easy to job hunt. The 3 months in the pool puts a lot of stress and strain.' (P18, Male, 50, Cameroon, Assignment Tenure, 20 Months)

### Theme: Career planning and development

Although finding a job immediately in the home country was the primary concern, career planning utilising the new experience and skills acquired during expatriation was equally challenging. Many participants experience a low probability of maintaining or having a better position after repatriation:

'A return to my home country will mean an end in my tenure and my greatest concern therein would be to join a role that has given me the exposure and ability to apply myself as much as my current assignment has given me.' (P2, Male, 43, South Africa, Assignment Tenure, 23 Months)

Career planning and development seem to be lacking in the repatriation phase. The expatriates obtained new skills and experiences during the assignment and therefore need to rethink their career and job prospects. Many of them indicated that they will not necessarily want to be reappointed in their previous jobs:

'To find an appropriate role, as during assignment the expat gathers new experiences and develops further, hence expat is unlikely willing to do the old job.' (P10, Female, 45, South Africa, Assignment Tenure, 12 months)

### Theme: Readjustment

Readjustment in the home country was also seen by many as a challenge once back from the assignment. The change in schooling, culture and lifestyles seemed challenging to handle. For the family, adjustment to their home country environment and culture needs special assistance:

'Adapting to a new environment and new style of working may be a learning curve.' (P19, Female, 35, Ghana, Assignment Tenure, 9 Months)

All the participants mentioned that they needed to start over again during repatriation. Readjustment for them and their families is not easy, and interventions need to be put in place to assist them with this transition and uncertainty:

'Nothing is certain. Starting all over again. Getting a home, a school for the children and generally settling down.' (P22, Male, 31, Guinea Bissau, Assignment Tenure, 9 Months)

### Theme: Remuneration

The concern that returning to their home country will see a drop in their remuneration unsettled many expatriates. This lowering of income causes them to obtain financial planning assistance so that the repatriation phase is undertaken in an effective manner. Then also they need to be informed about their remuneration package, with specific reference to their bonus and taxation:

'What happens to my bonus for the period I was on the assignment during the year? Will I receive any documents related to in-country salary and taxation?' (P12, Female, 35, Cameroon, Assignment Tenure, 7 months)

### Contributing factors of an expatriate life cycle

Based on the survey of expatriates about their experience of the global assignment cycle, generally, it can be deduced that the contributing factors were career-path planning, effective and ongoing training and mentoring, a caring organisational culture, clear assignment policy and social relations. These factors are relevant and effective in different assignment stages, and the findings have been categorised accordingly to make the analysis more credible and precise.

One of the interview questions was, 'In your opinion, what are the contributing factors to completing an assignment successfully?', and the reply to this question was categorised into five themes as described below, relevant to different stages of the global assignment project.

### Pre-assignment stage

#### Theme: Mentoring and training for the new role

Including a continuous mentoring and training process across the assignment life cycle is highly desirable. Mentors appointed during pre-assignment should serve as intermediaries between company management and the assignee, enabling effective communication for successful job completion. Participants desired a dedicated mentor for

feedback and communication between all people concerned. A mentor can be a precious asset for the family as well:

‘Constant communication and feedback to both group and local HR as well as to my supervisor have also contributed to the effectiveness.’ (P24, Male, 46, Benin, Assignment Tenure, 33 Months)

Various participants mentioned that training for the new role is of utmost importance in the pre-assignment phase. This contributing factor will set the expatriate up for success:

‘Clear objective setting; Training for a new role; Career discussion prior and during an assignment for preparation for Repatriation Mentoring.’ (P10, Female, 45, South Africa, Assignment Tenure, 12 Months)

## Assignment stage

### Theme: Career-path planning and development

The participants strongly felt the need for a clear and crisp career-path planning and development. The objectives and action plan should be spelt out unambiguously, and no adjustment or learning should happen along the way. Everything needs to be accounted for in the plan. Adequate job authority was accepted as a vital element for a successful expatriate operation. The participants also expressed the need for regular follow-up and feedback sessions with open discussions between the assignee and expatriate management:

‘From my point of view, it needs to be considered as a journey and have a clear action plan and clarification for every step to ensure the expats will be clear on the new environment and can address the issues on time rather than expect them to learn it on their own during long-time.’ (P1, Male, 42, Cameroon, Assignment Tenure, 19 Months)

As part of career development, expatriates need to obtain regular feedback and open discussions. A performance management system should therefore be put in place.

Stressing the communication and feedback, participant P12 replied, ‘A quarterly/half yearly feedback or open discussion with the assignee and expatriate management. The assignee should also get feedback about the assignment’.

### Theme: Caring organisational culture

An enabling, healthy and conducive organisational culture and excellent organisational performance contributes to the expatriate’s future growth opportunities, success and career development. It requires a group effort to familiarise the assignee with the job and foreign work culture:

‘An enabling and conducive Organisational climate ... Good organisational performance, healthy organisational brand and one that is growing – further growth opportunities.’ (P7, Male, 38, South Sudan, Assignment Tenure, 20 Months)

An expatriate should be open to learning from colleagues. This mindset and openness will assist the expatriate in successfully completing the assignment phase. The expatriate must also share his or her experiences during this phase in order to enhance a learning culture:

‘Allowing your new work colleagues to teach you about their environment but also being equally prepared to share with them your own experiences, from which they can learn also.’ (P5, Male, 41, Nigeria, Assignment Tenure, 8 months)

### Theme: Clear assignment policy and implementation

The lack of an assignment policy is a significant stressor throughout the assignment life cycle. A well-defined assignment policy and proper implementation of the process were professed as contributing to the persistence and successful completion of current and future assignments.

‘Expatriate policy must be communicated and shared so that the assignee can fully understand the policy and know what to expect before making the final decision.’ (P8, Male, 41, South Africa, Assignment Tenure, 17 Months)

Policy changes must be communicated regularly for the successful completion of the assignment phase and the preparation for repatriation. This will assist the expatriate in constantly being informed in order to make the right decisions:

‘Equally important, expats being kept informed about any policy changes.’ (P16, Male, 39, South Sudan, Assignment Tenure, 11 Months)

### Theme: Social relations

Social relations turned out to be significant for the adjustment and successful completion of an assignment. Building a friendship with local employees and existing expatriates was regarded as a way for expatriates and their families to immerse themselves in the culture and fabric of the country. Building strong social relations supported the family in adapting to the unfamiliar environment and simultaneously supported the expatriate in successful job performance:

‘Fully embrace the culture of the country you are in. If you become too entrenched in expat communities, you never fully understand the country’s dynamics. Connecting with local staff.’ (P6, Male, 53, Guinea Bissau, Assignment Tenure, 38 Months)

## Repatriation stage

Out of the 24 repatriates surveyed, 16 assignees did not find the repatriation process effective for different reasons. Five of the 16 expatriates were on their first assignment. Ten of the 16 assignees had not experienced a repatriation process because they were moved between offices in the MNE to complete their assignments. Three participants shared their discontent with the preparation process and repatriation because of no communication, the lack of assignment policy and unfair treatment.

The interpretation is that there is little clarity or expatriate awareness of what reintegration planning and repatriation procedures entail. A lack of assignment policy caused unawareness and feelings of anxiety or unfair treatment during repatriation. There was also no easy way to tap into the reintegration planning process information. However, based on the survey of stressors during repatriation, it had been communicated and deduced that re-induction in the home

country and finding a suitable career post–global assignment was stressful for the participants, and based on this, it can be concluded that a mutually acceptable and beneficial re-induction of the expatriates in the home country could reduce a great deal of stress and result in a positive and more engaging experience for the employer and the employee.

## Discussion of findings

Deliberation on the findings led to better insights and a grasp of the constraining and contributing factors.

All three phases of the assignment life cycle depend on trust, engagement and communication, as framed by the psychological contract theory of seminal author Argyris (1957) and POS theory as discussed in Kurtessis et al. (2017).

### Constraining factors

#### Pre-assignment

Most expatriates perceived pre-assignment support as disappointing before commencing their assignment abroad. Contract negotiations and policies seemed vague, while a lack of HRM support caused insecurity and discontent in the early stages of the assignment period. The general agreement was that training and mentoring are crucial in the pre-assignment phase. Mentoring and support delivered through a caring organisation were perceived as major factors in overall job performance and adjustments. Koleša (2021) concurs with the findings of this study in the sense that inadequate training, development and mentoring of global assignments are constraints during the pre-assignment phase.

O'Byrne (2018) agrees that once appointed, the assignee may need technical assistance to properly settle in the foreign country. In many cases, expatriates perceived HR logistical support for relocation, accommodation and schooling as either unavailable or inadequate at some foreign affiliates. During their e-mail interviews, expatriates recommended several improvements to IHRM support and procedures in the pre-assignment phase. A good process ensures satisfied and experienced expatriates and the retention of experts by the company (Naude & Vögel, 2018). Koleša (2021) concurs with the findings of this study in the sense that low-quality logistics support is a constraint during the pre-assignment phase.

Guðmundsdóttir and Eðvarðsdóttir (2017) also found that the organisation must be sensitive and caring towards expatriates, and this finding concurs with the finding in the current study. Morris (2020) concurs that an indifferent or unsupportive organisation can lead to the undesirable termination of the assignment.

#### Across-assignment

In the current study, it was clear that a lack of mentoring and training seems to be a constraint during the assignment phase. Morris (2020) found that ambiguity can severely demotivate the expatriate (Morris, 2020). The lack of an

assignment policy and procedures to cover career planning and development prompted the failure of the company to retain expatriates after the completion of their assignments (Chen & Schaffer, 2017). This concurs with the finding of a lack of assignment policy as a constraining factor in the current study.

### Repatriation

Various participants indicated that being uncertain was a constraining factor. Komakech and Orach (2022) also found that the repatriation process is stressful for the expatriates and their families, and information and education campaigns are therefore essential to alleviate uncertainty. In the current study, job availability was a constraining factor. The awareness of not finding another job caused an urgent need for a vacant position within the same multinational enterprise (Baruch et al., 2016; Breitenmoser & Bader, 2016).

Career planning and development were prominent constraining factors in the current study. Concern and unease about communication and career path planning peaked just before repatriation (Baruch et al., 2016; Breitenmoser & Bader, 2016). Molinsky and Hahn (2016) also found that career path planning is essential or else career anxiety may occur among the expatriates.

Readjustment of expatriates can be a constraining factor if HR does not give proper assistance and guidance. Breitenmoser and Bader (2016) also found that it is the responsibility of the HRM to resettle the expatriate back into the home country on completion of the assignment if not re-assigned to other international projects or else it will constrain the expatriates.

Remuneration can be a constraining factor if expatriates are not rewarded to fulfil their needs. Kraimer et al. (2016) also found that monetary rewards, compensation and employment benefits like home leave, assignment bonuses, stipends, the cost of living and financial support for schooling, accommodation and other utilities for expatriates are essential in this phase. The high turnover within a year of repatriation is significant because of the gap between the repatriates and the company's expectations and offers (Chen & Shaffer, 2017; Naude & Vögel, 2018), and this concurs with the constraints found in the current study.

### Contributing factors

#### Pre-assignment stage

In the current study, it was found that mentoring and training for the new role of expatriates can contribute to successful preparation. Kurtessis et al. (2017) are in agreement that training and mentoring contribute to the successful preparation of expatriates.

#### Assignment stage

According to the finding of the current study, career path planning and development are essential contributing factors

in the pre-assignment phase. Expatriates regard performance appraisal as imperative for job satisfaction, work performance and a successful managerial outcome (McNulty & Vance, 2017). In this current study, a caring organisational culture is of utmost importance, and Chen and Shaffer (2017) also found that a caring organisation culture and organisational support are essential in this phase. A clear assignment policy and implementation, as well as social relations, are also important contributors found in this current study. O'Byrne (2018) found that it helps the expatriate family to interact with host-country nationals, overcome language barriers and navigate social, political and religious differences. Wortland (2018) agrees that the expatriates should be guided through sociocultural challenges (Wortland, 2018).

### Repatriation stage

There is little clarity or expatriate awareness of what reintegration planning and repatriation procedures comprise. A lack of an assignment policy caused unawareness and feelings of anxiety or unfair treatment during repatriation. There was also no easy way to tap into the reintegration planning process information.

### Practical implications

The findings and the discussion from this study can be an impetus for further research in the field of global mobility. This research study can also form the basis to formulate or design a framework to suitably accommodate all the concerns and constraining factors. The study is a great insight for HR managers into the various reasons that derail international assignments at multiple stages. Appropriate corrective actions can be formulated by the group and local officials to ensure better return on investment (ROI) on international assignment projects.

The contributing factors chart an optimistic roadmap for the HR strategists and planners to lead the initiative towards a successful international assignment life cycle.

### Limitations and recommendations

Despite deploying the most suitable design and quality parameters, the specific limitation of conducting face-to-face interviews and group discussions could not be avoided, given that the research covered multiple geographies.

The data analysis and interpretation relied on the researcher's subjective philosophical approach to the research. Subjectivity may reduce the reliability of the data, as the information may be interpreted differently and draw different answers to the research questions.

One of the researchers was an HR practitioner as well as an expatriate. Bias may influence data collection, analysis and interpretation of the e-mail interview. As a solution, this researcher used the company's internal satisfaction survey outcomes to confirm his research findings.

Not all expatriates were well versed in English and might have understood the questions from their background, culture and reality. The researcher tried to set the interview questions as clearly and modestly as possible – after the input from a group of expatriates in a pilot test of the interview guide.

Some expatriates were assigned to war-torn countries or foreign offices with different attitudes, cultures and work ethics. Therefore, participants did not similarly experience their global assignment life cycle and HR support. These issues could have affected the overall perceptions of the expatriates if drawn from a different sample. Research in a global company with a different footprint might also render different results.

For future research, it is recommended that a quantitative study be conducted to investigate the demographic differences regarding the contributing and constraining factors during an assignment life cycle framework in a multinational enterprise.

### Ethical considerations

The researcher needed to ensure that the research design was methodologically sound and morally defensible. The law protects people's rights to privacy and their right to refuse to participate in a research study (Banks, 2013). For this reason, the researcher requested permission from each participant before conducting the interviews. Participants gave their consent by replying to the e-mails. Ethical approval to conduct this study was obtained from the Ethics Committee of the Da Vinci Business School (ref. no. 8663).

The researchers had to show respect for the participants' views, beliefs and attitudes during the execution of the e-mail interviews. Confidentiality of their records and anonymity of their accounts were essential. The participants' names were replaced with codes, for example, P1, P2. For 5 years, all the documents will be stored safely on secure private cloud technology software. After that, data will be destroyed by deleting the records from the software.

Furthermore, the researcher guaranteed that no information would be used for nonresearch purposes, except where improvements could be encouraged to the global mobility process. The research findings were reported so that neither the individuals nor the MNE could be identified. The researchers also ensured no conflict of interest when the participants were invited for the e-mail interviews, as suggested by Zikmund et al. (2013). Permission was granted from the MNE as well as from the university where the study was conducted.

### Conclusion

Using qualitative research and adopting interpretivism, the researcher analysed the e-mail data to deduce the contributing

and constraining factors associated with the various stages of the expatriation life cycle. The major constraining factors revealed were a lack of training and mentoring, inadequate cultural acclimatisation, ambiguous policies, a less empathetic and caring organisation, low-quality logistics support and ineffective re-induction of the expatriates into the home country. The findings converge with the literature review and the independent internal satisfaction survey document of the MNE, leading to successful triangulation and lending due credibility to the research. The respective factors, categorised into various themes, can be used with great advantage to reduce the financially painful failure rate of international assignments. The considerable cost and subsequent losses, monetary and otherwise, warrant immediate and efficacious remedy of the international assignments.

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## Competing interests

The author(s) declare that they have no financial or personal relationship(s) that may have inappropriately influenced them in writing this article.

## Authors' contributions

Z.D.R. conducted this research and C.M.S. was the supervisor.

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## Data availability

The data were kept electronically. The original completed e-mail interviews were also stored.

## Disclaimer

The views expressed in this article are those of the authors and do not necessarily reflect the official policy or position of any affiliated agency of the authors.

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