



## Exploration of challenges in expatriate management of multinational corporations in South Africa – an expatriate perspective



Thesis submitted in fulfillment of the requirements for the degree **Master of International Business** at The Independent Institute of Education, IIEMSA.

***Lena Hemker***



*Supervisor: Dr. C. Van Greunen*

30 / 10 / 2023

## DECLARATION

I, Lena Hemker, declare that this Research Report entitled “Exploration of challenges in expatriate management of multinational corporations in South Africa – an expatriate perspective” submitted for the Master of International Business degree to The Independent Institute of Education is my own, unaided work and has not been previously submitted to another University or Higher Education Institution for degree purposes. Any assistance that I have received has been duly acknowledged in the report.

Except where reference is made in the text, this report contains no material published elsewhere or extracted in whole or part from a thesis or report presented by me for another qualification. No other person’s work has been used without due acknowledgement in the main text of the report.

Signed:

A black rectangular box redacting the signature.

Date: 30 October 2023

## **ABSTRACT**

With globalisation advancing constantly, international management and business expansion play a significant role in the quest of multinational corporations (MNCs) to remain competitive. To maintain competitive advantage, a local and global workforce is needed, which has led to an increasing number of expatriate managers in recent years. Expatriate managers are therefore of high importance to MNCs and often play a crucial role in their operations. It is also important that the expatriate process is strategically developed for the success of an international assignment. However, literature on expatriate management reveals that several challenges relating to the expatriate process affect international assignments. In the worst case these assignments lead to expatriate failure and premature termination of the assignment.

The challenges identified in the existing body of knowledge on expatriate management are rather general and not linked to a specific country or region. Furthermore, a general lack of empirical research on expatriate management through a diverse cultural lens and from the perspective of expatriate managers in the host country exists. Challenges typically reflect the perspective of headquarters and rarely incorporate the viewpoint of expatriate managers in the host country. The purpose of this study was to explore the challenges that expatriate managers experienced (and expected to experience with regard to their repatriation) relating to the MNC's expatriate management process during and after their international assignment in South Africa. By identifying and managing the challenges, the likelihood of expatriate failure and premature termination of the international assignment can be reduced.

To address the purpose of this study, an interpretivist philosophy and inductive research approach were adopted. The research was therefore qualitative in nature and semi-structured interviews were conducted with expatriate managers working for two different German MNCs in Gauteng, South Africa. Convenience and snowball sampling were used in this regard to identify research participants as no database was available to access the whole population (or even the accessible population) of expatriate managers in South Africa or Gauteng. The collected data was analysed by means of thematic analysis and led to six themes. Each theme represents the answer to challenges in one stage or substage of the expatriate process.

The findings of this study revealed several new challenges that make a valuable contribution to the body of knowledge on expatriate management as they have not been identified in existing literature. Notable newly identified challenges include, but are not limited to, uncertainties for the expatriate manager due to challenges with company processes, poor internal communication by the MNCs, unfamiliar living and working conditions in the host country, and managing unexpected situations. MNCs and expatriate managers can address the challenges associated with the expatriate management process through the practical recommendations proposed in this study. For example, open, effective and transparent communication by the MNC is a key recommendation, and offering briefing sessions about the expatriate management process. Other recommendations include comprehensive expatriate partner support, comprehensive cross-cultural training that include aspects of cultural intelligence, a look-and-see visit to the host country, and a yearly visit to the headquarters.

# TABLE OF CONTENTS

|                                                                          |           |
|--------------------------------------------------------------------------|-----------|
| <b>DECLARATION.....</b>                                                  | <b>2</b>  |
| <b>ABSTRACT .....</b>                                                    | <b>3</b>  |
| <b>LIST OF TABLES .....</b>                                              | <b>10</b> |
| <b>LIST OF FIGURES .....</b>                                             | <b>11</b> |
| <b>LIST OF ABBREVIATIONS .....</b>                                       | <b>12</b> |
| <b>CHAPTER ONE: INTRODUCTION .....</b>                                   | <b>13</b> |
| <b>1.1 INTRODUCTION AND BACKGROUND.....</b>                              | <b>13</b> |
| <b>1.2 PROBLEM STATEMENT .....</b>                                       | <b>14</b> |
| <b>1.3 RATIONALE AND SIGNIFICANCE OF THE STUDY.....</b>                  | <b>14</b> |
| <b>1.4 RESEARCH PURPOSE, OBJECTIVES AND QUESTIONS.....</b>               | <b>16</b> |
| <b>1.5 RESEARCH DESIGN AND METHODOLOGY .....</b>                         | <b>17</b> |
| 1.5.1 RESEARCH PHILOSOPHY .....                                          | 18        |
| 1.5.2 RESEARCH APPROACH TO THEORY DEVELOPMENT .....                      | 18        |
| 1.5.3 METHODOLOGICAL CHOICE .....                                        | 18        |
| 1.5.4 RESEARCH STRATEGY .....                                            | 18        |
| 1.5.5 TIME HORIZON.....                                                  | 18        |
| 1.5.6 DATA COLLECTION.....                                               | 18        |
| 1.5.7 DATA ANALYSIS .....                                                | 19        |
| <b>1.6 SCOPE OF THE STUDY .....</b>                                      | <b>19</b> |
| <b>1.7 ETHICAL CONSIDERATIONS.....</b>                                   | <b>20</b> |
| <b>1.8 DEFINITIONS OF KEY CONCEPTS.....</b>                              | <b>20</b> |
| <b>1.9 CHAPTER OUTLINE .....</b>                                         | <b>21</b> |
| <b>1.10 CONCLUSION .....</b>                                             | <b>23</b> |
| <b>CHAPTER TWO: LITERATURE REVIEW .....</b>                              | <b>24</b> |
| <b>2.1 INTRODUCTION TO AND BACKGROUND OF EXPATRIATE MANAGEMENT .....</b> | <b>24</b> |
| 2.1.1 CONTEXTUALISATION AND DEFINITION OF EXPATRIATE MANAGEMENT .....    | 24        |
| 2.1.2 RATIONALES FOR EXPATRIATE MANAGEMENT .....                         | 25        |
| <b>2.2 EXPATRIATE MANAGEMENT IN A BROADER CONTEXT.....</b>               | <b>26</b> |

|                                                                                                        |               |
|--------------------------------------------------------------------------------------------------------|---------------|
| 2.2.1 INTERNATIONAL ASSIGNMENTS .....                                                                  | 27            |
| 2.2.2 GLOBAL TALENT MANAGEMENT .....                                                                   | 27            |
| 2.2.3 CULTURAL DIFFERENCES BETWEEN SOUTH AFRICA AND GERMANY .....                                      | 28            |
| 2.2.3.1 Hofstede's cultural dimensions.....                                                            | 29            |
| 2.2.3.2 Hall's context theory .....                                                                    | 33            |
| 2.2.4 MODELS USED FOR THE THEORETICAL FRAMEWORK.....                                                   | 35            |
| <b>2.3 CHALLENGES EXPERIENCED IN THE EXPATRIATE MANAGEMENT PROCESS AND<br/>EXPATRIATE FAILURE.....</b> | <b>38</b>     |
| 2.3.1 CHALLENGES EXPERIENCED REGARDING RECRUITMENT AND SELECTION .....                                 | 39            |
| 2.3.2 CHALLENGES EXPERIENCED REGARDING PRE-DEPARTURE PREPARATION .....                                 | 40            |
| 2.3.3 CHALLENGES EXPERIENCED REGARDING EXPATRIATE ADJUSTMENT.....                                      | 41            |
| 2.3.4 CHALLENGES EXPERIENCED REGARDING REPATRIATION .....                                              | 43            |
| 2.3.5 EXPATRIATE FAILURE.....                                                                          | 44            |
| <b>2.4 SIMILAR STUDIES .....</b>                                                                       | <b>46</b>     |
| <b>2.5 CONCLUSION .....</b>                                                                            | <b>49</b>     |
| <br><b>CHAPTER THREE: RESEARCH DESIGN AND METHODOLOGY.....</b>                                         | <br><b>51</b> |
| <b>3.1 INTRODUCTION .....</b>                                                                          | <b>51</b>     |
| <b>3.2 RESEARCH PHILOSOPHY .....</b>                                                                   | <b>51</b>     |
| <b>3.3 RESEARCH APPROACH TO THEORY DEVELOPMENT .....</b>                                               | <b>52</b>     |
| <b>3.4 METHODOLOGICAL CHOICE .....</b>                                                                 | <b>52</b>     |
| <b>3.5 RESEARCH STRATEGY AND CONTEXT .....</b>                                                         | <b>53</b>     |
| <b>3.6 TIME HORIZON .....</b>                                                                          | <b>53</b>     |
| <b>3.7 DATA COLLECTION AND ANALYSIS.....</b>                                                           | <b>54</b>     |
| 3.7.1 RESEARCH POPULATION .....                                                                        | 54            |
| 3.7.2 SAMPLING METHOD .....                                                                            | 54            |
| 3.7.3 SAMPLING SIZE .....                                                                              | 55            |
| 3.7.4 DATA COLLECTION PROCEDURE.....                                                                   | 56            |
| 3.7.5 ETHICAL CONSIDERATIONS .....                                                                     | 57            |
| 3.7.6 DATA ANALYSIS .....                                                                              | 59            |
| <b>3.8 CONCLUSION .....</b>                                                                            | <b>62</b>     |
| <br><b>CHAPTER FOUR: DATA ANALYSIS AND INTERPRETATION .....</b>                                        | <br><b>63</b> |
| <b>4.1 INTRODUCTION .....</b>                                                                          | <b>63</b>     |
| <b>4.2 DEMOGRAPHIC PROFILE .....</b>                                                                   | <b>63</b>     |
| 4.2.1 SAMPLE SIZE.....                                                                                 | 63            |

|                                                                                                                                                                  |           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| 4.2.2 DESCRIPTION OF RESPONDENTS .....                                                                                                                           | 64        |
| <b>4.3 DATA COLLECTION STRATEGIES .....</b>                                                                                                                      | <b>65</b> |
| 4.3.1 EFFECTIVE LISTENING .....                                                                                                                                  | 66        |
| 4.3.2 GATHERING OF NON-VERBAL DATA .....                                                                                                                         | 66        |
| 4.3.3 TRUSTWORTHINESS AND RIGOUR OF THE STUDY .....                                                                                                              | 66        |
| <b>4.4 DATA ANALYSIS PROCESS.....</b>                                                                                                                            | <b>67</b> |
| <b>4.5 EMPIRICAL FINDINGS .....</b>                                                                                                                              | <b>68</b> |
| 4.5.1 THEME ONE: CHALLENGES EXPERIENCED DURING RECRUITMENT AND SELECTION FOR<br>THE CURRENT POSITION .....                                                       | 72        |
| 4.5.1.1 Category 1.1: Ignoring soft skills during selection .....                                                                                                | 72        |
| 4.5.1.2 Category 1.2: Poor internal communication .....                                                                                                          | 73        |
| 4.5.1.3 Category 1.3: Uncertainty due to company processes and circumstances .....                                                                               | 73        |
| 4.5.1.4 Category 1.4: Uncertainty due to external factors .....                                                                                                  | 74        |
| 4.5.2 THEME TWO: CHALLENGES EXPERIENCED DURING THE PREPARATION FOR THE<br>INTERNATIONAL ASSIGNMENT .....                                                         | 75        |
| 4.5.2.1 Category 2.1: COVID-related uncertainties.....                                                                                                           | 75        |
| 4.5.2.2 Category 2.2: Unfamiliar living and working conditions .....                                                                                             | 76        |
| 4.5.2.3 Category 2.3: Poor internal communication on process of expatriate management ..                                                                         | 76        |
| 4.5.2.4 Category 2.4: Unclear situation for partner.....                                                                                                         | 77        |
| 4.5.2.5 Category 2.5: Dealing with administrative processes by showing self-initiative .....                                                                     | 78        |
| 4.5.2.6 Category 2.6: Training not adequately preparing for assignment .....                                                                                     | 79        |
| 4.5.2.7 Category 2.7: Difficulties obtaining a visa .....                                                                                                        | 80        |
| 4.5.3 THEME THREE: CHALLENGES EXPERIENCED REGARDING POSITION, TASKS AND<br>RESPONSIBILITIES WHILE BEING ON INTERNATIONAL ASSIGNMENT .....                        | 82        |
| 4.5.3.1 Category 3.1: Dealing with and working in the unknown .....                                                                                              | 82        |
| 4.5.3.2 Category 3.2: Dealing with unexpected situations.....                                                                                                    | 83        |
| 4.5.3.3 Category 3.3: Distance disrupting relationships .....                                                                                                    | 84        |
| 4.5.3.4 Category 3.4: Working in a different organisational structure and culture.....                                                                           | 85        |
| 4.5.4 THEME FOUR: CHALLENGES EXPERIENCED REGARDING INTERACTION AND<br>COMMUNICATION WITH HOST-COUNTRY NATIONALS WHILE BEING ON INTERNATIONAL<br>ASSIGNMENT ..... | 86        |
| 4.5.4.1 Category 4.1: Navigating emotional communication in a sensitive culture .....                                                                            | 87        |
| 4.5.4.2 Category 4.2: Dealing with cultural peculiarities .....                                                                                                  | 88        |
| 4.5.4.3 Category 4.3: Establishing relationships with locals .....                                                                                               | 88        |
| 4.5.4.4 Category 4.4: Cultural diversity.....                                                                                                                    | 89        |
| 4.5.5 THEME FIVE: CHALLENGES EXPERIENCED REGARDING GENERAL ADJUSTMENT WHILE<br>BEING ON INTERNATIONAL ASSIGNMENT .....                                           | 90        |
| 4.5.5.1 Category 5.1: Changes in family set-up may affect success of international                                                                               |           |

|                                                                                                                                                              |                |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| assignment.....                                                                                                                                              | 90             |
| 4.5.5.2 Category 5.2: The lack of basic needs .....                                                                                                          | 92             |
| 4.5.5.3 Category 5.3: Settling in completely requires time.....                                                                                              | 93             |
| 4.5.6 THEME SIX: CHALLENGES EXPECTED TO EXPERIENCE DURING THE REPATRIATION.....                                                                              | 95             |
| 4.5.6.1 Category 6.1: Having to show a higher degree of flexibility .....                                                                                    | 95             |
| 4.5.6.2 Category 6.2: No planning of future career .....                                                                                                     | 96             |
| 4.5.6.3 Category 6.3: Struggle to adapt to the home country again.....                                                                                       | 97             |
| 4.5.6.4 Category 6.4: Repatriation not seen as important as other stages .....                                                                               | 99             |
| 4.5.6.5 Category 6.5: Uncertainty about the future.....                                                                                                      | 100            |
| <b>4.6 CONCLUSION .....</b>                                                                                                                                  | <b>101</b>     |
| <br><b>CHAPTER FIVE: CONCLUSIONS AND RECOMMENDATIONS .....</b>                                                                                               | <br><b>103</b> |
| <br><b>5.1 INTRODUCTION .....</b>                                                                                                                            | <br><b>103</b> |
| <b>5.2 OVERVIEW OF RESEARCH .....</b>                                                                                                                        | <b>103</b>     |
| 5.2.1 RESEARCH PROCESS .....                                                                                                                                 | 103            |
| 5.2.2 RESEARCH OBJECTIVES ADDRESSED .....                                                                                                                    | 104            |
| <b>5.3 SUMMARY OF EMPIRICAL RESULTS .....</b>                                                                                                                | <b>106</b>     |
| 5.3.1 PROFILE OF RESPONDENTS .....                                                                                                                           | 106            |
| 5.3.2 TRUSTWORTHINESS AND RIGOUR OF THE STUDY .....                                                                                                          | 106            |
| 5.3.3 DISCUSSION AND RECOMMENDATIONS FROM THEMATIC ANALYSIS .....                                                                                            | 106            |
| 5.3.3.1 Theme one: Challenges experienced during recruitment and selection for the current position.....                                                     | 107            |
| 5.3.3.2 Theme two: Challenges experienced during the preparation for the international assignment.....                                                       | 108            |
| 5.3.3.3 Theme three: Challenges experienced regarding position, tasks and responsibilities while being on international assignment.....                      | 113            |
| 5.3.3.4 Theme four: Challenges experienced regarding interaction and communication with host-country nationals while being on international assignment ..... | 115            |
| 5.3.3.5 Theme five: Challenges experienced regarding general adjustment while being on international assignment .....                                        | 117            |
| 5.3.3.6 Theme six: Challenges expected to experience during the repatriation.....                                                                            | 119            |
| <b>5.4 CONTRIBUTION OF THE STUDY .....</b>                                                                                                                   | <b>121</b>     |
| <b>5.5 LIMITATIONS OF THE STUDY AND RECOMMENDATIONS FOR FUTURE RESEARCH ...</b>                                                                              | <b>122</b>     |
| <b>5.6 CONCLUSION .....</b>                                                                                                                                  | <b>123</b>     |
| <br><b>REFERENCE LIST .....</b>                                                                                                                              | <br><b>125</b> |

|                                                                             |            |
|-----------------------------------------------------------------------------|------------|
| <b>ANNEXURE A: SAMPLE OF MEASUREMENT INSTRUMENT .....</b>                   | <b>138</b> |
| <b>ANNEXURE B: SAMPLE OF INFORMED CONSENT FORM .....</b>                    | <b>139</b> |
| <b>ANNEXURE C: SAMPLE OF AUDIO OR VIDEO RECORDING FORM .....</b>            | <b>141</b> |
| <b>ANNEXURE D: SAMPLE OF GATEKEEPER’S LETTER .....</b>                      | <b>142</b> |
| <b>ANNEXURE E: ETHICAL CLEARANCE LETTER .....</b>                           | <b>143</b> |
| <b>ANNEXURE F: COMPLETE TABLE OF THEMES, CATEGORIES AND CODES<br/>.....</b> | <b>144</b> |
| <b>ANNEXURE G: CERTIFICATE OF EDITING .....</b>                             | <b>152</b> |
| <b>ANNEXURE H: SIMILARITY REPORT .....</b>                                  | <b>153</b> |
| <b>ANNEXURE I: SUPERVISORS PERMISSION TO SUBMIT .....</b>                   | <b>154</b> |

## LIST OF TABLES

|                                                                                   |     |
|-----------------------------------------------------------------------------------|-----|
| Table 4.1: An overview of the participants.....                                   | 64  |
| Table 4.2: An overview of the themes, categories and codes .....                  | 69  |
| Table 5.1: Research questions and objectives addressed in the current study ..... | 105 |

## LIST OF FIGURES

|                                                                                        |    |
|----------------------------------------------------------------------------------------|----|
| Figure 2.1: Values of Hofstede's cultural dimensions for Germany and South Africa..... | 31 |
| Figure 2.2: Low-context and high-context cultures .....                                | 34 |
| Figure 2.3: Expatriate management process .....                                        | 36 |
| Figure 2.4: Theoretical model.....                                                     | 38 |
| Figure 2.5: Conceptual model .....                                                     | 45 |
| Figure 3.1: Research design and methodology for the present study.....                 | 62 |

## LIST OF ABBREVIATIONS

|         |                                                        |
|---------|--------------------------------------------------------|
| CQ      | Cultural intelligence                                  |
| eg      | exempli gratia                                         |
| et al.  | et alia                                                |
| etc     | et cetera                                              |
| FDI     | Foreign direct investment                              |
| GTM     | Global talent management                               |
| HCN     | Host-country nationals                                 |
| ie      | id est                                                 |
| IHRM    | International human resource management                |
| IIE MSA | Independent Institute of Education Monash South Africa |
| MNC     | Multinational corporation                              |
| PCN     | Parent-country nationals                               |
| RO      | Research objective                                     |
| RQ      | Research question                                      |
| TCN     | Third-country nationals                                |
| UAE     | United Arab Emirates                                   |
| UK      | United Kingdom                                         |
| US      | United States                                          |

# CHAPTER ONE: INTRODUCTION

## 1.1 INTRODUCTION AND BACKGROUND

With globalisation advancing rapidly and geographical and cultural borders being less restrictive to populations and workforces, international management – together with its challenges – plays an increasingly relevant role for multinational corporations (MNCs) (Ozdemir & Cizel, 2007; Tarique & Schuler, 2018). International activities are constantly escalating to realise the MNCs' quest for increasing their sales while minimising their costs and risks at the same time (Ozdemir & Cizel, 2007; Michie, 2019). Multinational corporations are expanding and relocating their business activities throughout the world to remain competitive globally and locally (Schuler, Tarique & Jackson, 2011; Michie, 2019). However, to transfer and maintain the competitive advantage of the MNC within and between their subsidiaries, both local and global workforces are needed (Tarique & Schuler, 2018). With the MNCs' increasing number of foreign subsidiaries, the number of foreign assignments has also increased over the past years and so has the number of expatriates working in an MNC's subsidiary (Caligiuri & Bonache, 2016; Tahir & Egleston, 2019). As cultural and geographic boundaries become less of a barrier to employees (Tarique & Schuler, 2018) and increasing competition between MNCs urges them to source new employees irrespective of their global location (Collings, 2014), the number of expatriates may even grow further in the near future. Nowadays, foreign assignments in a multinational company are no longer seen as something unique, but as a usual experience for the company's employees (Tahir, 2018). Apart from the key role that employees play, the expatriates among them are of high importance to MNCs as they often play a crucial role in the MNCs' operations (Caligiuri & Bonache, 2016; Tahir, 2018).

Expatriate managers are typically placed on international assignments for three reasons: firstly, leadership and career development are realised by expatriate managers being exposed to a new culture; secondly, organisational development occurs by sustaining well-developed links between the MNC's headquarters and their foreign subsidiaries; and, thirdly, a position is filled when local talent shortages are experienced (Collings, 2014; Caligiuri & Bonache, 2016; Tarique & Schuler, 2018). For the expatriate manager to execute their assignment successfully, it is essential that the ex-

patriate has the necessary skills and that the expatriate process is strategically developed (Ozdemir & Cizel, 2007; Tahir & Egleston, 2019).

## **1.2 PROBLEM STATEMENT**

Although it is important that the expatriate process is strategically developed for the success of an international assignment, the literature reveals that international assignments are influenced negatively by several challenges relating to the expatriate process, which – in the worst case – can lead to expatriate failure and eventual termination of the assignment (Tahir, 2018). In view of this research problem, Tahir and Egleston (2019) assert that the failure rate of international assignments ranges between 10 and 80 per cent, leading to an estimated cost of between US \$40 000 and \$1 million per failed or non-completed assignment.

Challenges concerning international assignments that have been identified in the literature review are about expatriate management in general and include both talent shortages (especially in emerging markets) and talent surpluses. These challenges involve the capability to recruit, train, mobilise and retain the expatriate managers, linking them with and coordinating them across foreign subsidiaries, and finding the adequate compensation levels (Schuler *et al.*, 2011; Tarique & Schuler, 2018). On the other hand, the challenges about the expatriate management process have been identified as the following: unsystematic, informal and rushed recruitment of expatriate managers; ignorance towards the candidate's interpersonal and intercultural skills; cross-cultural differences between the countries involved; deficient cross-cultural skills and insufficient cross-cultural training; the expatriate's inability to adapt to the host culture; disrupted relations between headquarters and their subsidiaries; and neglecting the repatriation process or part of the process (Orpen, 2003; Jassawalla, Truglia & Garvey, 2004; Ozdemir & Cizel, 2007; Collings, 2014; Stahl, 2017; Tahir & Ertek, 2018; Waxin, 2018; Tahir & Egleston, 2019).

## **1.3 RATIONALE AND SIGNIFICANCE OF THE STUDY**

Although several different challenges in expatriate management have been identified in the literature review (see Chapter Two), these challenges are rather general. Most of the studies in expatriate management focus on expatriate management in general and not on a specific region or country (Tahir & Egleston, 2019). In studies where

the focus falls on specific countries or regions, these are mostly Western countries, Japan or China (Tahir, 2018; Tahir & Egleston, 2019). However, these studies represent the headquarters' view and rarely include the expatriate managers' perspective of expatriate management (Tarique & Schuler, 2018).

In three studies similar to the current study, the expatriate managers' views were investigated and interviews with them were conducted. Firstly, Tahir (2018) explored the ways in which expatriate managers were selected, trained, deployed and supported throughout their expatriation to the United Arab Emirates (UAE); secondly, Tahir and Egleston (2019) examined the challenges and impediments that expatriate managers experienced throughout their assignment in the UAE, whereas Dousin and Sulong (2019) studied the cross-cultural challenges expatriate managers encountered during their international assignment in the Kingdom of Saudi Arabia. However, these studies cannot be readily applied to South Africa, because of cultural differences, among other factors. Therefore, the findings of the current study and subsequent recommendations can provide valuable insights to MNCs on ways to manage the challenges that expatriate managers experience and possibly reduce the costs associated with expatriate failure.

Considering the lack of empirical research on expatriate management through a diverse cultural lens and from the perspective of expatriate managers in the host country, South Africa was chosen as the focus of this study. The country was selected for two reasons, which also differentiate South Africa from most other (especially Western) countries. Firstly, South Africa has a rich cultural diversity (Khumalo & Zondo, 2021). Cross-cultural differences were identified as a challenge in the expatriate process; therefore, South Africa could present an even more difficult challenge for expatriates. Secondly, South Africa is, like most emerging markets, characterised by talent shortages and in need of highly skilled employees (Tarique & Schuler, 2018; Harry, Chinyamurindi & Dodd, 2019), especially in the areas of management, engineering and IT (Kirlidog, van der Vyver, Zeeman and Coetzee, 2018). This shortage is intensified by the loss of highly qualified and trained individuals that is prevalent in South Africa (Harry *et al.*, 2019).

Consequently, the literature review revealed a gap in expatriate management research focusing on the perspective of expatriate managers in the host country, and especially

on challenges expatriate managers experience in countries other than Japan, China, and Western countries. Emerging markets, and especially South Africa, were identified as an interesting focus of the current study. The challenges in the context of this study did not concentrate on the general challenges that MNCs encountered but rather on the challenges that expatriate managers experienced during the expatriate management process.

#### **1.4 RESEARCH PURPOSE, OBJECTIVES AND QUESTIONS**

In view of the research gap alluded to in the preceding sections, the purpose and primary objective of this study was to explore the challenges that expatriate managers experienced (and expected to experience with regard to their repatriation) relating to the MNC's expatriate management process during and after their international assignment in South Africa. For the purpose of this study, the expatriate management process was based on two models that informed the research problem, namely the model of Ozdemir and Cizel (2007) and the model of Black (1988), which are explained and justified in more detail in the literature review chapter (see Chapter Two, section 2.2). The expatriate management process entails the following steps: selection and recruitment, pre-departure preparation, foreign assignment/adaption, and repatriation.

The (secondary) research objectives of this study were the following:

1. To identify and empirically investigate the challenges that expatriate managers experienced during their selection and recruitment.
2. To identify and empirically investigate the challenges that expatriate managers experienced during their preparation for their international assignment.
3. To identify and empirically investigate the challenges that expatriate managers experienced during their foreign assignment, especially with regard to adaptation in the following areas:
  - a. adjustment to work;
  - b. adjustment to interacting with host-country nationals; and
  - c. adjustment to the general non-work environment.
4. To identify and empirically investigate the challenges that expatriate managers expected to experience during and after their repatriation to their country of origin.

The research was conducted among MNCs with subsidiaries in South Africa. Semi-structured interviews were conducted with the expatriate managers working for these MNCs in South Africa after obtaining all relevant permissions. As the participants were in the third step of the expatriate management process at the time of the study, research objectives one to three were based on the expatriates' already lived experiences. In contrast, research objective four was based on the challenges that the participants expected to experience during their repatriation.

This study was further guided by the main research question: What are the challenges that expatriate managers experienced and expected to experience about their recruitment and selection, preparation, adaptation and repatriation, during and after their foreign assignment in South Africa?

In view of the aforementioned, the primary research question was divided into the following subquestions:

1. What are the challenges that expatriate managers experienced during their recruitment and selection for their international assignment?
2. What are the challenges that expatriate managers experienced during their preparation for their international assignment?
3. What are the challenges that expatriate managers experienced during their foreign assignment, especially about their adaptation in the following areas:
  - a. adjustment to work;
  - b. adjustment to interacting with host-country nationals;
  - c. adjustment to the general non-work environment.
4. What are the challenges that expatriate managers expected to experience during and after their repatriation to their country of origin?

## **1.5 RESEARCH DESIGN AND METHODOLOGY**

The research design and methodology involved a detailed explanation of the different research and methodology aspects based on Saunders, Lewis and Thornhill's (2019) 'research onion'. The following section briefly outlines the current study's research philosophy, research approach to theory development, methodological choice, research strategy, time horizon, data collection and analysis techniques and procedures. In Chapter Three, a detailed overview of these elements is presented and justified.

### 1.5.1 RESEARCH PHILOSOPHY

This research followed the interpretivism paradigm. This paradigm involves developing an in-depth understanding of reality. Interpretivists seek to understand the behaviour of human beings and to observe the world through their eyes to explore what is important to them (Du Plooy-Cilliers, 2021).

### 1.5.2 RESEARCH APPROACH TO THEORY DEVELOPMENT

An inductive approach to theory development was used in this research, which involves starting with observations (Leedy & Ormrod, 2015; Saunders *et al.*, 2019), followed by a qualitative analysis of the observations to ultimately develop a theory (Miessler, 2020).

### 1.5.3 METHODOLOGICAL CHOICE

A qualitative research methodology was employed, which implies exploring the subjective experiences participants associate with a phenomenon. This methodology means that an in-depth analysis is conducted of what the participant experiences, perceives and attaches to a specific situation (Bezuidenhout & Strydom, 2021).

### 1.5.4 RESEARCH STRATEGY

The study followed the case study strategy that explores a research topic in its context (Saunders *et al.*, 2019), which further involves exploring the phenomenon in depth to obtain a full understanding (Bezuidenhout & Strydom, 2021).

### 1.5.5 TIME HORIZON

The study was a cross-sectional study, which means that data were collected at a specific point in time.

### 1.5.6 DATA COLLECTION

The research population consisted of all expatriates from foreign countries who were on an international assignment in South Africa at the time of the study, whereas the accessible population were expatriate managers from foreign countries who were on an international assignment in the Gauteng province of South Africa. The data were

collected from expatriate managers working at two German MNCs in Gauteng. The sampling method entailed a combination of convenience sampling and snowball sampling.

#### 1.5.7 DATA ANALYSIS

The data collected in the semi-structured interviews were analysed by means of thematic analysis.

The research design and methodology is discussed and justified in detail in Chapter Three.

### 1.6 SCOPE OF THE STUDY

The scope of the current study encompassed expatriate managers who worked for German MNCs and were at the time of this study at least for six months on their international assignment in South Africa. The research objective of this study was to identify and empirically investigate the challenges that expatriate managers experienced (and expected to experience with regard to their repatriation) during and after their international assignment. In order to do so, the study focused on the views of expatriate managers in the host country, as opposed to the perspective of the headquarters. The study further focalised on German MNCs in South Africa and did not include MNCs with headquarters in countries other than Germany. The last boundary of this study was the geographical scope, which focused solely on Gauteng, South Africa. The previously mentioned delimitations, while serving to define the scope of the study, could also be acknowledged as limitations, as they impact the generalisability of the findings to some extent. Considering the different types of international assignments (see Chapter 2, section 2.2.1), the current study interviewed expatriate managers who are on long-term assignments. Thus, other types of international assignments (ie, short-term assignments, commuter assignments, virtual assignments, and permanent transfers) were not included in the current study. With the focal point of this study being on long-term assignments, it needs to be clarified that the identified challenges might have been different if expatriate managers on other forms of international assignments had been interviewed.

## **1.7 ETHICAL CONSIDERATIONS**

In this research, the ethical guidelines provided in the Independent Institute of Education Monash South Africa (IIE MSA) Research and Postgraduate Studies Policy were followed. Before the interviews commenced, the researcher handed out an informed consent form to the participant. This form informed the participant about the purpose of the study, the approximate length of the requested interview, the details of what would be required from them as participants, and how the data collected from the interviews would be used. The consent form further informed the participant about the confidentiality of their data and the anonymity of their identity.

To transcribe the interviews, the researcher asked the participants for their permission to record the interviews. These interviews consisted of an audio recording for physical meetings and a video recording for the interviews conducted via Microsoft Teams. The document the participants signed informed them about the confidentiality and storage of the recordings.

Because the participants were asked about the challenges they had experienced and expected to experience during their international assignment, and the fact that their responses referred to the processes implemented at the company they had worked for, permission from the company's Human Resources Department or Managing Director to interview the participants was obtained prior to the interviews.

As no vulnerable groups were interviewed and no sensitive topics were covered, no major ethical risk was identified.

The ethical considerations are covered in detail in Chapter 3 (see section 3.7.5).

## **1.8 DEFINITIONS OF KEY CONCEPTS**

The following provides an overview of definitions of key concepts being used in this study:

Expatriate management process = The process expatriate managers go through in terms of their international assignment with the four stages: recruitment and selection, pre-departure preparation, foreign assignment and repatriation (Ozdemir &

Cizel, 2007).

Expatriate managers = ‘legally working individuals who reside temporarily in a country of which they are not a citizen in order to accomplish a career-related goal’ (Ren, Chadee and Presbitero, 2020: 571).

Expatriation = ‘an intentional, impermanent relocation of a person abroad for a commitment with an eventual return to his/her home country’ (Tahir, 2018: 418).

Host country = The country where the expatriate managers relocates to for their international assignment (Cavusgil, Knight and Riesenberger, 2012).

Host-country nationals = Employees of an MNC that are nationals of the country in which the subsidiary they are working for is located (Collings, Dowling & Scullion, 2006).

International assignment = ‘An international assignment refers to the organisational practice of sending an employee between a multinational company's (MNCs) units for a finite period.’ (Ridgway, 2023: 203).

Multinational corporation = ‘a large company with substantial resources that performs various business activities through a network of subsidiaries and affiliates located in multiple countries’ (Cavusgil, *et al.*, 2012: 12).

Parent-country nationals = Expatriates who are nationals of the same country in which the MNC has their headquarters, but are temporarily working for one of the MNC’s foreign subsidiaries (Collings, Scullion & Dowling, 2009).

Third-country nationals = Expatriates who are neither from the same country as the MNC nor from the same country in which the international subsidiary they are working for is located (Collings *et al.*, 2009).

## **1.9 CHAPTER OUTLINE**

The chapters of this study are outlined as follows:

Chapter One – This chapter introduced the topic and the research problem of the study, explained the rationale and significance of the study and presented the research purpose and research objectives. The chapter further provided a brief overview of the research design and methodology that was used, the scope of the study, ethical considerations and definitions of key concepts and concluded with a brief chapter outline.

Chapter Two – This chapter presents the literature review, which includes an introduction of and background to expatriate management. It further places expatriate management in a broader context by explaining the terms ‘international assignments’, ‘global talent management’ (GTM) and the cultural differences between South Africa and Germany in particular. After introducing and discussing the two models that were chosen to underpin this study, the challenges that expatriate managers typically experience are analysed based on the literature review. The chapter concludes with an overview of similar studies with respect to expatriate management.

Chapter Three – In this chapter, the research design and methodology is introduced. The methodology that was employed in this study is based on the ‘research onion’ by Saunders *et al.* (2019). In this respect, the chapter focuses on the research philosophy, research approach to theory development, methodological choice, research strategy, time horizon, data collection and analysis techniques and procedures.

Chapter Four – In this chapter, the analysis and interpretation of the data collected in the semi-structured interviews are presented. The relevant findings are discussed and comparisons to previous research and theories are made.

Chapter Five – In this final chapter, the conclusions and recommendations of the study are discussed. The chapter starts with a general overview of the research, its purpose and the achievement of the research objectives. The empirical findings are then summarised and conclusions and recommendations based on the findings are made. The chapter concludes with the contributions of the study, its limitations, and suggestions for future research.

## **1.10 CONCLUSION**

Chapter One introduced the topic and the research problem of the study, explained the rationale and significance of the study and presented the research purpose and research objectives. The chapter further provided a brief overview of the research design and methodology that was used, the scope of the study, ethical considerations and definitions of key concepts and concluded with a brief chapter outline.

## **CHAPTER TWO: LITERATURE REVIEW**

Chapter One provided an introduction and background to the study, with specific reference to the challenges expatriate managers experience. It presented the research problem, explained the rationale and significance of the study and stated the purpose and the research objectives. The chapter further provided a brief overview of the research design and methodology that was used, the scope of the study, ethical considerations and definitions of key concepts and concluded with a brief chapter outline.

Chapter Two follows up on the introduction to and background of expatriate management by contextualising and defining the term and pointing out the rationales for expatriate management. Expatriate management is further discussed in a broader context and the terms ‘international assignments’ and ‘global talent management’ are explained. Following this, the cultural differences between South Africa and Germany are analysed according to Hofstede’s (1980) cultural dimensions and Hall’s (1976) context theory. Further, the two models used for the theoretical framework are introduced and discussed, followed by other selected studies that identified challenges expatriate managers experienced in the expatriate management process. The chapter concludes by outlining the phenomenon of expatriate failure and summarising the work that has been done in similar studies in the field of expatriate management.

### **2.1 INTRODUCTION TO AND BACKGROUND OF EXPATRIATE MANAGEMENT**

In the following section, the concept of expatriate management is defined and conceptualised. Thereafter, the rationales for expatriate management are considered. This discussion is followed by explaining expatriate management in a broader context.

#### **2.1.1 CONTEXTUALISATION AND DEFINITION OF EXPATRIATE MANAGEMENT**

Expatriation can be defined as ‘an intentional, impermanent relocation of a person abroad for a commitment with an eventual return to his/her home country’ (Tahir, 2018: 418). Expatriate managers, who are also referred to as ‘expatriates’ in the liter-

ature, are globally mobile employees or international assignees (Caligiuri & Bonache, 2016). Ren *et al.* (2020: 571) define expatriates as ‘legally working individuals who reside temporarily in a country of which they are not a citizen in order to accomplish a career-related goal’. Expatriate managers can be divided into two groups: corporate expatriates and self-initiated expatriates (Harrison, Shaffer & Bhaskar-Shrinivas, 2004; Shaffer, Kraimer, Chen & Bolino, 2012). Corporate expatriates can be defined as ‘employees who are temporarily relocated by their organisation to another country, usually for several years, to complete a specific task or accomplish an organizational goal’ (Shaffer *et al.*, 2012: 1287). In contrast to corporate expatriates, self-initiated expatriates relocate to another country to work on their own, that is, without an MNC sending and/or financing them (Shaffer *et al.*, 2012, Dousin and Sulong, 2021). As the purpose of the current study was to explore the challenges expatriate managers experienced during the process of their international assignment with an MNC, this study focused on corporate expatriates. Therefore, the terms expatriates and expatriate managers are used interchangeably and as synonyms for corporate expatriates.

Besides the classification of expatriate managers as corporate expatriates and self-initiated expatriates, expatriate managers can also be categorised as parent-country nationals (PCNs) and third-country nationals (TCNs). PCNs are expatriates who are nationals of the same country in which the MNC has their headquarters, but are temporarily working for one of the MNC’s foreign subsidiaries. TCNs are neither from the same country as the MNC nor from the same country in which the international subsidiary is located (Collings *et al.*, 2009). A third group being considered as global staffing are the host-country nationals (HCNs), who are nationals of the country in which the subsidiary is located (Collings *et al.*, 2006). However, expatriates only cover PCNs and TCNs, both of which formed part of this study.

### 2.1.2 RATIONALES FOR EXPATRIATE MANAGEMENT

As mentioned earlier, expatriate managers are of growing importance to MNCs due to their expanding number of foreign subsidiaries and resultant upsurge in the number of expatriate managers (Caligiuri & Bonache, 2016). Although the world financial crisis in 2008 caused a decrease in international assignments, the numbers have recovered and are now constantly increasing (Tahir & Egleston, 2019). One reason

for MNCs sending expatriate managers on international assignments is to sustain a competitive advantage in an era of fierce global competition, as it is the expatriate manager's job to manage the subsidiary effectively (Ozdemir & Cizel, 2007).

Further, Tahir and Egleston (2019: 520) describe the job of an expatriate manager as 'that of a facilitator who can stimulate the transfer of knowledge, enrich cohesion and align coordination and control between the MNC practices and local demands', which supports a further rationale for MNCs to send employees on international assignments: to enhance organisational development through well-developed links between the MNCs headquarters and their foreign subsidiaries (Tarique & Schuler, 2018). The rationales for international assignments that have been mentioned most in the literature, however, are firstly, leadership and career development; secondly, organisational development; and, thirdly, position filling (Collings, 2014; Caligiuri & Bonache, 2016; Tarique & Schuler, 2018). Leadership and career development will be experienced by being exposed to a new culture, which includes not only learning about the local culture, but also transferring the learning acquired to the headquarters and the home country. Organisational development will be achieved through sustaining well-developed links between the MNC's headquarters and its foreign subsidiaries, as the expatriate manager experiences both sides. The links refer specifically to communication and coordination. Position filling as a rationale is mostly applicable in host countries that have a lack of a highly qualified workforce (Collings, 2014; Caligiuri & Bonache, 2016; Tarique & Schuler, 2018). The study conducted by Hilldrup (2015) mentions four further rationales for expatriate management: developing local business relationships, starting new ventures, transferring technology and transferring the corporate culture to subsidiaries.

The extent to which the expatriate manager completes their international assignment successfully and therefore also reaches the objectives and rationales of the assignment depends on several factors. These factors include not only the expatriate's skills and abilities, but also the extent to which the MNC implements and manages the expatriate management process successfully (Tahir & Ertek, 2018).

## **2.2 EXPATRIATE MANAGEMENT IN A BROADER CONTEXT**

The term 'international assignment' has been broadened in the past few years and

nowadays includes several elements, which are discussed in the subsequent section. Expatriate management is also examined in the broader context of global talent management, while the cultural differences between South Africa and Germany are also considered.

### 2.2.1 INTERNATIONAL ASSIGNMENTS

International assignments refer ‘to the organisational practice of sending an employee between a multinational company's (MNCs) units for a finite period’ (Ridgway, 2023: 203) and can be grouped into five elements: long-term assignments, short-term assignments, commuter assignments, virtual assignments, and permanent transfers (Collings, Morley & Scullion, 2007). Long-term assignments are traditional international assignments (Collings *et al.*, 2007), which are also the focus of this study as this focal point will allow for a more comprehensive data collection on the challenges experienced during the expatriate management process. Moreover, previous research, including the study by Harzing and Pudelko (2013) revealed that long-term expatriate assignments are still the most effective way to reach the MNC’s objectives of international assignments. Short-term assignments also describe a transfer to an international subsidiary but are limited to a period of one to 12 months (Collings *et al.*, 2007). Expatriates on commuter assignments commute weekly or bi-weekly between their home base and another subsidiary of the MNC (Collings *et al.*, 2007). In virtual assignments, managers do not relocate but are responsible for employees in foreign subsidiaries of the MNC (Collings *et al.*, 2006). Permanent transfers describe the transfer of expatriates to another country permanently, meaning that they are not planned to return to their country of origin (Collings *et al.*, 2006).

### 2.2.2 GLOBAL TALENT MANAGEMENT

Expatriate management in general forms part of global talent management (GTM) (Przytuła, 2018). Tarique and Schuler (2010: 124) define GTM as ‘IHRM activities (complementary HRM policies and practices) to attract, develop, and retain individuals with high levels of human capital (eg, competency, personality, motivation) consistent with the strategic directions of the multinational enterprise in a dynamic, highly competitive, and global environment’. Global talent management differs from international human resource management (IHRM) in that IHRM includes more stakeholders, such as suppliers, investors, customers, and employees. International human

resource management can thus be seen as a broader concept that makes provision for issues such as employee morale, organisational productivity, and policies and practices (Tarique & Schuler, 2010). Conversely, Mellahi and Collings (2014) suggest that GTM has three major roles that MNCs should consider: firstly, identifying the key positions that have a major influence on the MNC's competitive advantage; secondly, constructing a talent pool for high-performing colleagues to accept these roles; and, thirdly, developing a framework to enhance filling these key positions with the most suitable employee. With regard to GTM, MNCs often face the challenge of balancing their personnel management strategies between global coordination and local adaptation (Vaiman, Haslberger & Vance, 2015). Therefore, effective GTM is of critical importance to the subsidiaries' success and performance (Tarique & Schuler, 2018).

### 2.2.3 CULTURAL DIFFERENCES BETWEEN SOUTH AFRICA AND GERMANY

Given the global context of expatriate management, it is essential to understand the cultural differences that exist between different countries. Thus, the following section outlines the cultural differences and similarities between South Africa and Germany. As this study was conducted in the South African context and the two MNCs' where interviews were conducted are German MNC's (see Chapter Three, section 3.7.2), the spotlight in this section falls on these two countries. Further to that, Germany is one of the most active Western investors of foreign direct investment (FDI) in South Africa (Standard Bank, 2023), which emphasises the importance of understanding the cultural differences between these two countries. Other countries such as the United States (US), the United Kingdom (UK), Japan and China are also relevant when it comes to FDI in South Africa (Standard Bank, 2023), but as the interviews in this study were conducted in South Africa with employees from German MNCs, other countries were not deemed relevant in this context. The cultural differences were analysed according to Hofstede's (1980) cultural dimensions theory and Hall's (1976) context theory as they are the most influential theories in the literature on national culture (Cavusgil, *et al.*, 2012; Sharjeel, Haider & Aslam, 2021). The context theory and cultural dimensions theory provide insights about the challenges expatriate managers experience, as some of these challenges might result from cultural differences between the home- and the host country.

### 2.2.3.1 Hofstede's cultural dimensions

Hofstede (1980) introduced his theory of cultural dimensions to help understand how and why different cultures behave in the way they do. The theory was initially introduced with the four dimensions of power distance, individualism, masculinity and uncertainty avoidance. These dimensions have later been extended by the two dimensions of long-term orientation and indulgence (Luthans & Doh, 2012; Matharu, Von der Heide, Sorwar and Sivapalan, 2023).

The dimension of power distance refers to the degree to which differences in power and inequalities is accepted by less powerful individuals in a culture (Hofstede, Hofstede & Minkov, 2010). Cultures with a high level of power distance are characterised by individuals who strictly obey orders and centralised organisations with tall organisational structures. In contrast to that, cultures with a low level of power distance are characterised by decentralised and flatter organisations and an equal power distribution (Luthans & Doh, 2012; Hofstede Insights, 2023a; Matharu *et al.*, 2023).

The dimension of individualism describes the extent to which individuals of a culture is bound to each other. In an individualistic culture, individuals tend to look after their immediate family and themselves only, whereas people from collectivistic cultures have a strong sense of group belonging (Hofstede, Hofstede & Minkov, 2010; Luthans & Doh, 2012; Hofstede Insights, 2023a; Matharu *et al.*, 2023).

Regarding the dimension of masculinity, a culture or country can either be masculine or feminine. In a masculine culture gender roles are clearly distinguished from each other. Men are generally expected to exhibit toughness, assertiveness, and a strong drive for material success, whereas women are commonly perceived as tender, modest, and oriented towards enhancing their quality of life. In contrast to that, both genders are seen as tender, modest and focused on the quality of life in a feminine culture, as the gender roles overlap (Hofstede *et al.*, 2010; Hofstede Insights, 2023a; Matharu *et al.*, 2023).

The dimension of uncertainty avoidance is described as 'the degree to which the members of a culture feel threatened by ambiguous or unknown situations' (Hofstede *et al.*, 2010: 191) and is related to the way individuals deal with their future. Individ-

uals of a culture with a high level of uncertainty avoidance tend to have a strong need for security, written rules and well-structured organisational activities, whereas individuals of a culture with a low level of uncertainty avoidance are usually more open to the risks of the unknown (Luthans & Doh, 2012; Hofstede Insights, 2023a; Matharu *et al.*, 2023).

Long-term orientation describes the ways a culture manages its connections to its history while simultaneously addressing the demands of the present and future. Cultures with a short-term orientation prioritise traditions and norms and tend to approach societal changes with scepticism. In contrast to that, long-term oriented cultures promote thriftiness, emphasising contemporary education efforts as a means to prepare for the future (Hofstede *et al.*, 2010; Hofstede Insights, 2023a; Matharu *et al.*, 2023).

Hofstede's latest dimension, indulgence, refers to the degree to which human desires and impulses is controlled. Countries with a high score in this dimension tend to not control their desires and impulses very much and rather focus on enjoying life and having fun (indulgent countries). In contrast to indulgent countries stand restraint countries, which are characterised by strict norms and regulations that control human desires and impulses (Hofstede *et al.*, 2010; Hofstede Insights, 2023a; Matharu *et al.*, 2023).

The values attached to each cultural dimension in South Africa and Germany are illustrated in Figure 2.1 and discussed next.

When considering South Africa's cultural dimensions as shown in Figure 2.1, the country's scores are as follows: power distance: 49, individualism: 65, masculinity: 63, uncertainty avoidance: 49, long-term orientation: 34, and indulgence: 63 (Hofstede Insights, 2023a). A score of 49 in the power distance dimension indicates that South Africa has a moderate power distribution and that hierarchical orders are widely accepted, as long as 'everybody has a place'. Centralisation of organisations is common with employees expecting their managers to give clear instructions. With a score of 65, South Africa is seen as an individualistic country, meaning that South Africans are expected to look after their immediate family and themselves only. Further, in an organisational framework, contracts between the employer and the em-

ployee are based on mutual advantage and management is about managing individuals, not groups.

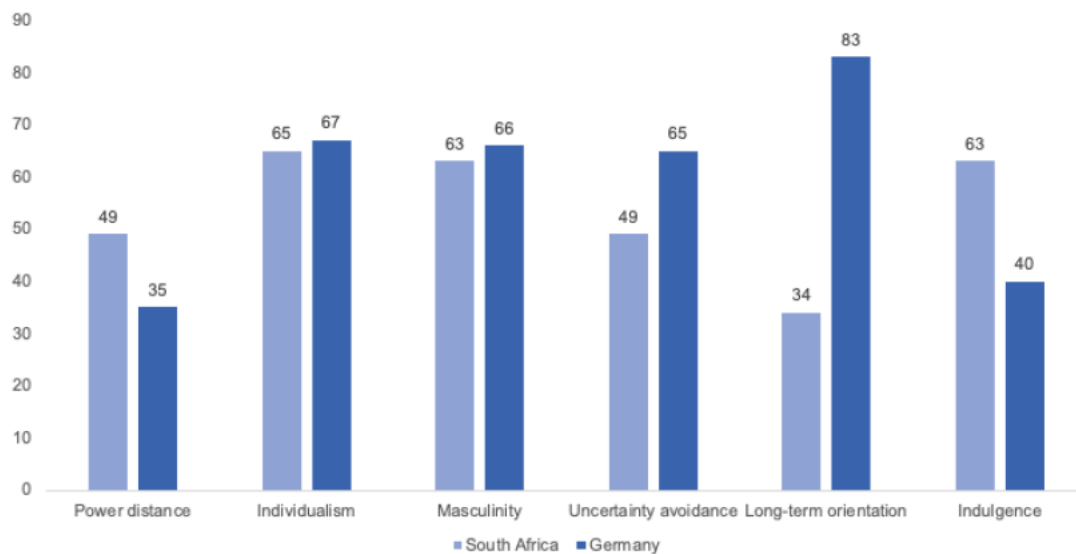


Figure 2.1: Values of Hofstede's cultural dimensions for chosen countries

Source: Researcher's own construction based on Hofstede Insights 2023b.

On the dimension of masculinity, South Africa's score of 63 points to a masculine culture that lives to work and focuses on material success, competition and performance. In organisations, supervisors are expected to be assertive and decisive. With a score of 49 points in the dimension of uncertainty avoidance, South Africans tend to accept risks where the result is not known. Practice has a higher standing point than principles and deviating from the norm is accepted. Rules should exist only as long as they are necessary, timetables remain flexible and punctuality is not a natural trait. South Africa's low score of 34 for long-term orientation indicates that the country's past with its traditions and norms plays an important role in the South African culture. The focus is typically on achieving quick results and saving money for the future is not prioritised. Last, South Africa's high score of 63 in the indulgence dimension shows the individual's willingness to realise their desires to enjoy their lives and to be happy. They tend to have a positive attitude led by optimism and see their leisure time as important (Hofstede Insights, 2023a). To summarise, the South African culture can be characterised as individualistic, masculine, and indulgent with individuals concentrating on themselves, performance and success and fulfilment of their desires. However, Iacob and Dumitrescu (2012) mention that South Africa is a diverse country and these scores can differ between the different ethnic groups in

South Africa.

When having a closer look at Germany's cultural dimensions, the country's scores are as follows: power distance: 35, individualism: 67, masculinity: 66, uncertainty avoidance: 65, long-term orientation: 83, and indulgence: 40 (Hofstede Insights, 2023b). With a low score of 35 for power distance, German individuals tend to not accept differences in power. Organisations are usually highly decentralised, communication is direct and inclusive, leadership is based on expertise, and control is not accepted. On the dimension of individualism, Germany's score of 67 points to an individualistic country with a focus on the immediate family – which is usually limited to the parent–child relationship – and self-actualisation. Further, Germany is known for its direct communication with the tendency to always be honest – even if it hurts – and an environment in which individuals learn from their mistakes. A score of 66 in the masculinity dimension characterises Germany as a masculine country. The emphasis is on performance and individuals live to work and obtain their self-esteem from successful tasks. Status symbols such as cars and watches are used to signify a high social standing. Germany's score of 65 for uncertainty avoidance indicates that German individuals can be seen as avoiding uncertainty; they need a systematic overview to go ahead with tasks and certainty usually is a prerequisite. The high score of 83 in the dimension of long-term orientation indicates Germany's emphasis on saving and investing money for the future and the country's ability to adjust their traditions when situations or conditions change. Last, the low score of 40 in the indulgence dimension characterises Germany as a restrained culture, which highlights the control of desires by German individuals, meaning that they deem leisure time of low importance. The German individuals' attitude is more pessimistic than optimistic and a prevalent thinking pattern among them is that indulging is being seen as wrong (Hofstede Insights, 2023b). To summarise, Germany is typified as a masculine and individualistic culture that does not accept differences in power. They also try to avoid the unknown by focusing on the certain and prioritises the future over the past and the present, which is also reflected by their inclination not to indulge.

When comparing South African culture to German culture based on Hofstede's (1980) cultural dimensions, it can be said that both countries have very similar scores in masculinity and individualism. This similarity shows that both countries attach

importance to both masculine values and their immediate family. Differences can be recorded in the following four dimensions: South Africa's higher score in power distance shows that hierarchical orders and clear instructions from superiors are accepted and even expected. In Germany, on the other hand, hierarchies are dismantled to achieve a decentralised organisation where everyone can contribute. The second difference can be seen in uncertainty avoidance. Germany's level of uncertainty avoidance is very high, whereas South Africa's level of uncertainty avoidance is moderate to low, showing that South Africans can live with the unknown. In contrast to that, Germans always need certainty before they will, for example, start with a task. The third and also biggest difference is in the dimension of long-term orientation. South Africa can clearly be defined as having a short-term-oriented culture that focuses on the past and the present, quick results and traditions, whereas Germany has a long-term-oriented culture emphasising a financially secure future and long-term results. The last difference between South African and German culture can be recorded in the dimension of indulgence. Germans tend to be restrained by social norms when it comes to following their desires and enjoying their lives, whereas South Africans focus on exactly that: enjoying their lives, being happy and being led by a positive attitude (Hofstede Insights, 2023b).

#### 2.2.3.2 Hall's context theory

Hall's (1976) context theory is based on his concept of low-context and high-context cultures. Low-context cultures communicate very explicitly, directly and straightforward, which means that individuals say what they mean and their counterparts can rely on the words being said. In these cultures, verbal communication is used to transmit ideas and thoughts in a way that is logical and clear to everyone (Cavusgil *et al.*, 2012; Alizadeh Afrouzi, 2021). Low-context cultures can be found in North America and Northern and Western Europe with examples in the US, Germany, Switzerland and the Scandinavian countries (Herselman & Van Greunen, 2010; Alizadeh Afrouzi, 2021). Conversely, high-context cultures communicate in an indirect and face-saving way to show respect for each other. A 'no' is often spoken hesitantly and individuals are more likely to use phrases like 'it is difficult'. Communication is used to promote relationships in a smooth and harmonious way. Thus, expressing negative feelings such as anger, impatience, frustration or irritation disrupts the harmony in the relationship and is seen as being rude. The focus of communica-

tion in high-context cultures is on non-verbal messages (Cavusgil *et al.*, 2012; Alizadeh Afrouzi, 2021). Examples of high-context cultures are found in most Asian countries (especially China and Japan), but also most in countries in Latin America, Africa and the Middle East (Herselman & Van Greunen, 2010; Alizadeh Afrouzi, 2021). An overview of low-context and high-context cultures can be seen in Figure 2.2. Germany can be identified as a low-context culture (Van Everdingen & Waarts 2003; Herselman & Van Greunen, 2010; Cavusgil *et al.*, 2012; Alizadeh Afrouzi, 2021). As explained earlier, this means that Germans use a very direct communication style, rely on spoken words and they do not hesitate to express their ideas and thoughts.

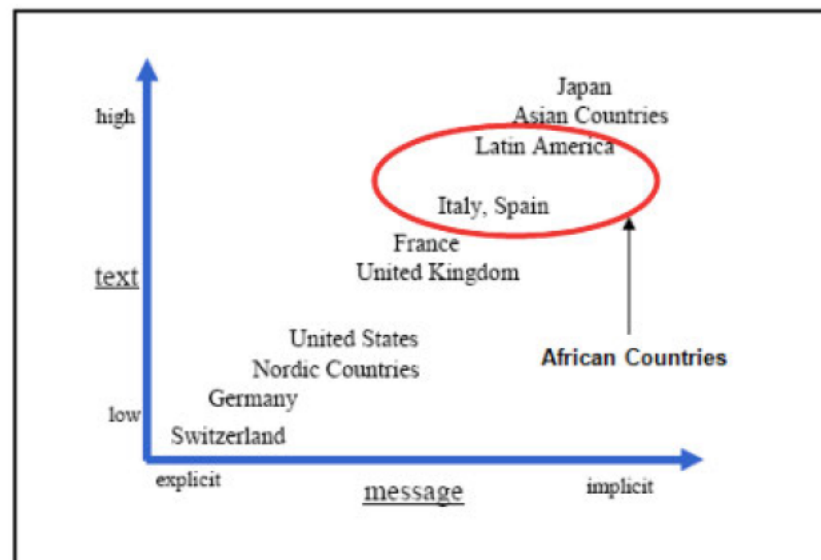


Figure 2.2: Low-context and high-context cultures

Source: Herselman and van Greunen (2010: 53).

The exact classification of South Africa has not been determined in the extant research, although some researchers classify the country as part of a group of countries. Herselman and Van Greunen (2010) placed the African countries between Italy and Spain and the Latin American countries in the area of high-context cultures (Figure 2.2), according to their investigation of relevant literature. Van Everdingen and Waarts (2003) also categorise African countries as high-context countries. Iacob and Dumitrescu (2012) go one step further and differentiate between the different ethnic groups in South Africa. According to these authors, white South Africans have a low-context culture with an explicit, direct and straightforward way of communication. In contrast to that, Iacob and Dumitrescu (2012) assert that black South Afri-

cans, who in this context only represent the black African population in South Africa, tend to have a high-context culture since they communicate verbally and non-verbally and body language is used to emphasise the message.

The classification of South Africa cannot be confirmed or revised with more recent literature, except for Alizadeh Afrouzi's research (2021), in which the author mentions that Africans can be classified as high-context cultures. However, a difference between the countries has been found which may lead to communication problems and misunderstandings between them.

As mentioned earlier, the background of the cultural differences and similarities provides insights with regard to understanding the challenges expatriate managers experience during their international assignment, as some of these challenges may be caused by cultural differences.

#### 2.2.4 MODELS USED FOR THE THEORETICAL FRAMEWORK

Cultural differences between the home- and the host country can lead to major challenges for expatriates, which may then lead to expatriate failure if adaptation is unsuccessful (Tahir & Egelston, 2019). In order to analyse the challenges expatriate managers experience, two models were used as the framework for this study. These models are the expatriate management process model by Ozdemir and Cizel (2007) in combination with the expatriate adjustment model by Black (1988). The challenges identified in the literature are linked to these models and are explored in more detail in the further course of this literature review.

The model by Ozdemir and Cizel (2007) was chosen because it provides a holistic representation of the expatriate management process and its challenges, which aligns with the focus of this study. It was further successfully used by Tahir (2018) and Tahir and Egleston (2019) when investigating expatriate management in previous studies. Black's (1988) model is one of the oldest in the field of expatriate management research. It has been used as a theoretical basis in several studies, is well-cited and is considered as successful and influential in explaining expatriate experiences with regard to adjustment (Haslberger & Brewster, 2007; Takeuchi, 2010).

The expatriate management process model by Ozdemir and Cizel (2007) views expatriate management as an overall process with four stages: recruitment and selection, pre-departure preparation, foreign assignment and repatriation (Figure 2.3). It addresses the challenges expatriate managers may experience in each stage and explains that these should be considered carefully to ensure the effectiveness of both the expatriate and the MNC, because every challenge the expatriate experiences in the process of expatriation may have an impact on the overall process (Ozdemir & Cizel, 2007).

The recruitment and selection stage is concerned with global staffing and whether to employ parent-country nationals, host-country nationals or third-country nationals. The employment choice has a high impact on the MNC's performance (Tarique & Schuler, 2018).



Figure 2.3: Expatriate management process

Source: Ozdemir and Cizel (2007: 175).

This stage is often carried out in an unsystematic, informal and rushed way (Collings, 2014; Tahir & Egleston, 2019). Further, the selection criteria usually only focus on technical skills and ignore interpersonal and cultural skills (Tahir, 2018). Ozdemir and Cizel (2007) explain that all critical selection factors should be part of this stage, including skills and competencies one needs to work and live effectively in a foreign country. The recruitment and selection of expatriate managers should further be carried out within a framework of a comprehensive career management system to sustainably develop expatriate managers in the MNC (Ozdemir & Cizel, 2007). The aim of the pre-departure preparation stage is to prepare the expatriate managers for their international assignment, teaching them about the host country's culture and enabling them to interact and communicate effectively when living in the host country to

avoid challenges (Tahir & Egleston, 2019). Ozdemir and Cizel (2007) show that cross-cultural training is the focal point of this stage to teach the expatriate manager the necessary skills to adapt successfully. The authors further mention that language knowledge is of high importance for the expatriate manager to communicate effectively and the authors suggest that language training be included in this stage. To overcome any further challenges, MNCs should offer support to the expatriate's family to increase the overall attractiveness of the foreign assignment (Ozdemir & Cizel, 2007; Tahir & Egleston, 2019). The foreign assignment stage describes the time the expatriate manager spends in the host country. Challenges experienced in this stage in particular focus on processes, systems, lifestyles and communication patterns that are characterised by cross-cultural differences (Stahl, 2017). Ozdemir and Cizel (2007) explain that expatriate managers often struggle to adapt to new surroundings, which has a direct influence on their personal and managerial effectiveness and performance and can thus be seen as the most critical challenge. In addition to this, factors such as leadership styles, satisfaction and efficient interaction and communication with host-country nationals can influence the expatriate's performance. To address further challenges, the MNC should also consider the career of the expatriate's spouse and potential work-family conflicts the expatriate may have (Ozdemir & Cizel, 2007, Tahir & Egleston, 2019). The repatriation stage is often ignored in the expatriation process although it is of the same importance as the other stages (Ozdemir & Cizel, 2007; Hilldrup, 2015). According to Ozdemir and Cizel (2007), this stage should be an efficient process to decrease the chance of expatriate failure and sustain the expatriate's commitment to the MNC. Since repatriation could create a challenge when it comes to readjusting in the home country, the repatriation process should start before the expatriate returns to the home country (Ozdemir & Cizel, 2007; Tahir & Egleston, 2019).

The expatriate adjustment model by Black (1988) describes the following three facets of adjustment: work adjustment, interaction adjustment, and general adjustment (Black, 1988; Black & Stephens, 1989). Work adjustment refers to the degree of comfort the expatriate feels about their work tasks, responsibilities, values and expectations; interaction adjustment refers to the degree of comfort felt by the expatriate about the interaction and communication with HCNs and different communication styles; and general adjustment refers to the degree of comfort the expatriate feels about the new non-work environment in the host country, such as food, living condi-

tions and the weather (Black, 1988; Black & Stephens, 1989; Takeuchi, 2010; Ercan & McAbee, 2013).

For the purposes of this study, the two models by Ozdemir and Cizel (2007) and Black (1988) were combined into one. Since the expatriate's adjustment occurs during the international assignment (Black, 1998), Black's three facets of adjustment represent the foreign assignment stage. These two models were combined before in studies by Tahir (2018) and Tahir and Egleston (2019), who explored the ways in which expatriate managers on international assignments in the UAE were selected, trained, deployed and supported during and after their assignment. The theoretical model that was used for this study is shown in Figure 2.4 and discussed in the subsequent section.

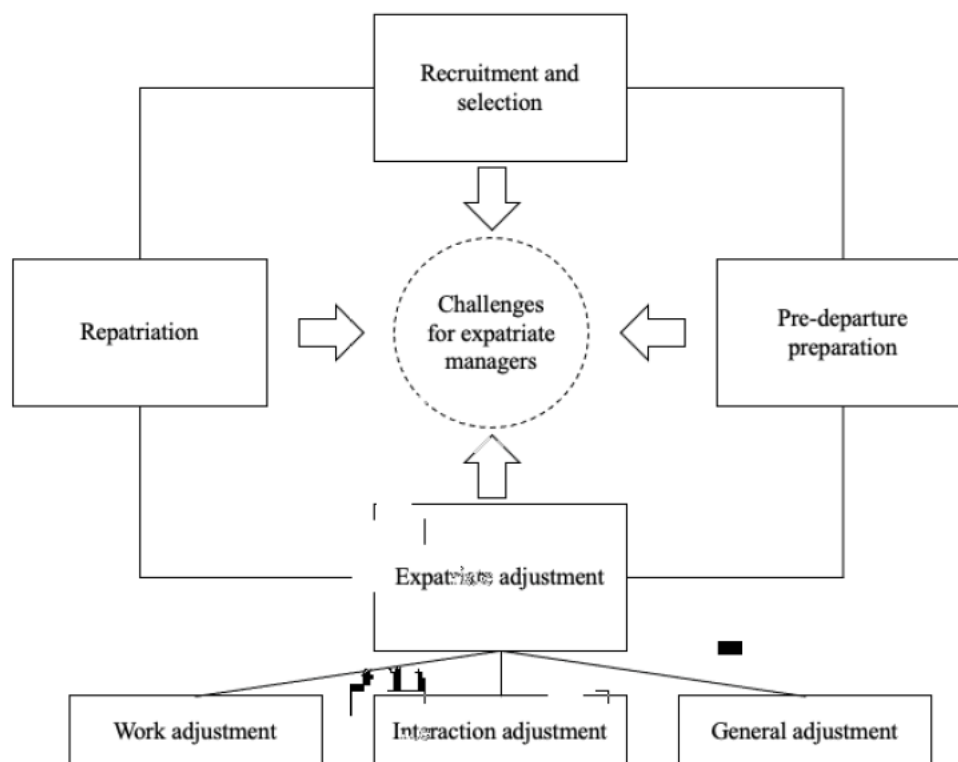


Figure 2.4: Theoretical model

Source: Researcher's own construction based on Black, 1988; Black & Stephens, 1989; Ozdemir & Cizel, 2007.

### 2.3 CHALLENGES EXPERIENCED IN THE EXPATRIATE MANAGEMENT PROCESS AND EXPATRIATE FAILURE

The combined model as shown in Figure 2.4 provides a holistic representation of the

expatriate management process. Ozdemir and Cizel (2007) and many other researchers identified several challenges in the expatriate management process. These challenges are discussed in the following sections, which include a presentation of previous empirical studies. The challenges are discussed according to each stage of the expatriate management process as illustrated in Figure 2.4. The section concludes with a discussion of the phenomenon of expatriate failure that often results from challenges experienced during this process (Tahir & Egelston, 2019).

### 2.3.1 CHALLENGES EXPERIENCED REGARDING RECRUITMENT AND SELECTION

Regarding the recruitment and selection of expatriate managers, three main challenges have been identified in the literature review. The first challenge is the focus on technical skills and the disregard of other skills. Tahir (2018) conducted a study on the challenges that Western expatriate managers experienced during the process of their international assignment to the UAE. Being a qualitative study, 22 Western expatriate managers in the UAE were interviewed. Tahir (2018) found that technical skills were the predominant criteria for selecting these expatriate managers, whereas language proficiency and adjustment skills were not part of the criteria. Most of the participants also confirmed that they were selected based on their technical skills, whereas their soft skills and personal characteristics were mostly ignored (Tahir, 2018). This challenge was also noted in the model by Ozdemir and Cizel (2007). These authors mention that the recruitment manager must take into account all skills that are necessary for the expatriate manager to be effective during their international assignment. Lastly, Tahir and Egleston (2019) confirm the existence of this challenge in their quantitative study on the challenges that expatriate managers experienced during their international assignment in the UAE. The study was based on a questionnaire among 110 expatriate managers from five Anglo-Saxon countries. Tahir and Egleston (2019) further underline that interpersonal skills and cultural empathy in particular were ignored during the recruitment and selection of expatriate managers.

The second challenge identified in the literature review is the informal and often rushed selection of expatriate managers. Collings (2014) explains that this process is ad-hoc and informal, for both short-term and long-term assignments. Tahir and

Egleston (2019) further identified the recruitment and selection of expatriate managers as irrational and often beyond the control of the human resources department, as the authors found that many selections were made based on recommendations by employees in the MNC. In addition to this, the authors state that the selection and recruitment of expatriate managers are often carried out in limited time as the openings are usually crucial and relocation needs to take place immediately. This challenge was confirmed in the study by Tahir (2018), in which most of the participants indicated that no specific method was followed during their recruitment and selection.

The third challenge identified in the literature review is the lack of a long-term orientation of the recruitment and selection of expatriate managers. Stahl (2017) shows that the career planning made for expatriate managers is often inadequate. With regard to this challenge, Ozdemir and Cizel (2007) suggest that recruitment and selection be based on a comprehensive career management system to ensure that the long-term development of expatriate managers is taken care of.

### 2.3.2 CHALLENGES EXPERIENCED REGARDING PRE-DEPARTURE PREPARATION

The challenges identified regarding the pre-departure preparation are mostly about the lack of intercultural training, lacking language skills and inadequate family support. Dousin and Sulong (2021) conducted a qualitative study among 12 Western expatriate managers in the Kingdom of Saudi Arabia on the cross-cultural challenges these expatriate managers experienced. In this study, the authors determined a lack of pre-departure training as the interviewed expatriate managers were unprepared when they arrived in the Kingdom of Saudi Arabia. The authors mention that cross-culture training enhances the expatriate manager's capability to adapt to the foreign culture and they point out that it is crucial to offer customised cross-cultural training on the differences between the home and the host culture. Dousin and Sulong (2021) do not consider standardised training to be efficient, as they believe that the training must be tailored to the two involved cultures and the specific MNC. The authors further explain that language training enhances the adjustment of the expatriate manager as it facilitates the establishment of relationships with new colleagues. Tahir (2018) discovered in his study conducted in the UAE that most interviewees did receive cross-

cultural training. However, the training was neither tailored to the expatriate manager's specific needs nor to the culture of the UAE. This shortcoming resulted in the expatriate manager's mentioning that the training did not facilitate their capability to adapt to the new culture and that they were not prepared well for their international assignment, which led to unrealistic expectations. Tahir and Egleston (2019) confirmed the lack of preparation of expatriate managers but put it in a broader context. The authors found that few participants in their study received a physical examination before relocating to the host country and that even less preparation was arranged for their family members. Tahir and Egleston (2019) point out that appropriate cross-cultural training is necessary for the expatriate manager to be happy during their international assignment, which further influences the performance and successful completion of the assignment. Wilczewski, Soderberg and Gut (2019) conducted a study on a European expatriate manager being on an international assignment in Asia. The authors used the instrument of in-depth narrative interviews to analyse the collaboration challenges that the expatriate manager experienced in the work environment in Asia. The authors found that although the expatriate manager was experienced in dealing with intercultural communication and different cultures, was able to speak two foreign languages, had worked in another country before and in general showed an openness to intercultural experiences, being exposed to the new culture was a challenge for her. In this case, the expatriate attended cross-cultural training, but only after being on her international assignment for five months. The lack of cross-cultural training was also identified in the study conducted by Dousin and Sulong (2021), as their participants did not receive proper training before they relocated to the Kingdom of Saudi Arabia. Ozdemir and Cizel (2007) mention the high costs that MNCs had to provide for cross-cultural training, which could be a reason for the lack of this kind of training. Haile and White (2019) also addressed this challenge in their study and expanded it to the lack of support and training offered to the expatriate's family members.

### 2.3.3 CHALLENGES EXPERIENCED REGARDING EXPATRIATE ADJUSTMENT

The challenges identified in the stage of expatriate adjustment primarily relate to the lack of support for the expatriate managers during the first weeks of their international assignment and difficulties to adapt to the new culture. These challenges can

also be attributed to the lack of cross-cultural training. The study conducted by Tahir (2018) points out that the majority of the interviewed expatriate managers received either no orientation or a very short orientation on their arrival in the host country. These circumstances led to them being dependent on favours of their new colleagues on the one hand, and to them experiencing a culture shock on the other hand. The culture shock was also pinpointed as a challenge in the study conducted by Dousin and Sulong (2021). The authors explain that the expatriate managers experienced a culture shock due to the gap between the home- and the host culture and inadequate knowledge about working in the Kingdom of Saudi Arabia, which can once again be linked to the lack of cross-cultural training. Tahir (2018) indicates that this lack of cross-cultural training leads to adaptation challenges for the expatriate manager, as cultural differences are an obstacle. Haile and White (2019) confirm this challenge by stating that expatriate managers who do not receive appropriate cross-cultural and language training struggle to adapt to their new environment, which leads to frustration and, in the worst case, to expatriate failure (see Chapter Two, section 2.3.5). Chen (2019) refers to the challenge of cultural differences, as expatriate managers have to adjust to the new culture, lifestyle and thinking principles. Ozdemir and Cizel (2007) add that the degree of adaptation has a direct effect on the performance and effectiveness of the expatriate manager. Along with the cultural differences, Tahir and Egleston (2019) also found a lack of support for expatriates after relocating to the host country. The participants in this study reported that their adaptation was not supported by their company, that their MNC failed to equip them with the necessary leadership skills, and that their family members were left without any support in finding a local job or local schools. A further challenge identified in expatriate adjustment was a disrupted relationship between the MNC's headquarters and the expatriate manager that occurred because of the different locations (Stahl, 2017), which also led to further challenges regarding repatriation.

To conclude, Sterle, Fontaine, De Mol and Verhofstadt (2018) classified the challenges experienced by expatriate managers during the stage of their international assignments (ie, adjustment phase) into six categories. The first category is the children's education as the expatriate manager's children may struggle to make friends and fit into new schools. The second category is the partner's resistance. The authors explain that the expatriate manager's partner often has to sacrifice their existing job in the home country, which can influence their career negatively. If the partner is not

eligible to work or able to find a job in the host country, the risk of unsuccessful adjustment increases. Further, if one partner fails to adjust, it affects the other partner's adjustment, leading to a downward spiral that can result in expatriate failure (Sterle *et al.*, 2018). The authors argue that the main reason for expatriate failure resulting in a premature return is the unsuccessful adaptation of the expatriate manager's partner, together with the partner's career issues. The partner's career being a concern is also mentioned by Ozdemir and Cizel (2007). The third category suggested by Sterle *et al.* (2018) is location difficulties, which describe the general adjustment to the new work and life environment. The challenges indicated in the fourth category of cultural adjustment relate to the ability to re-establish one's own identity in the new culture owing to the degree of differences, whereas the fifth category describes the challenge of language. If expatriate managers and their families are unable to speak the host country's language fluently, they often struggle to overcome cultural differences and to adjust to the new culture (Sterle *et al.*, 2018). The last category mentioned by the authors is the support for family members, which often lacks and therefore exposes the expatriate manager and their family to further challenges, such as finding a new career opportunity for the expatriate manager's partner, finding a suitable school for the children and finding an apartment that meets the family's needs (Sterle *et al.*, 2019).

#### 2.3.4 CHALLENGES EXPERIENCED REGARDING REPATRIATION

The biggest challenge regarding repatriation that has been identified in the literature is that this stage of the expatriate management process is often completely ignored by MNCs (Ozdemir & Cizel, 2007). Tahir (2018) found in his study that there was no strategy or plan for the participants' repatriation. Also, the study conducted by Tahir and Egleston (2019) points out that repatriation was not a priority in the expatriate management process. The authors indicate that expatriate managers could rely neither on a policy nor on an adjustment plan when returning to their home country, which led to a lack in the transfer of repatriating skills acquired during their assignment (Tahir & Egleston, 2019). Tahir and Egleston (2019) add that the expatriate managers faced the challenge of remaining connected to the headquarters, while most MNCs failed to support them in this regard. This impaired connection can result in an unsuccessful readjustment of the expatriate manager during their repatriation, which is another obstacle many expatriate managers experience during their repatria-

tion (Ozdemir & Cizel, 2007). Instead, if the expatriate manager had a mentor in the headquarters during their international assignment, if they were allowed to visit the headquarters yearly, and could sustain relationships with their colleagues in the headquarters, the challenge of unsuccessful readjustment can be avoided (Tahir & Egleston, 2019).

### 2.3.5 EXPATRIATE FAILURE

Expatriate failure can be defined as the unsuccessful performance by the expatriate manager, resulting in either their decision to move back to their home country or the MNC requesting their resignation (Tahir, 2018). Expatriate failure has been mentioned in several studies as a significant issue in the expatriate management process (eg, Jassawalla, Truglia & Garvey, 2004; Tahir, 2018; Tahir & Egleston, 2019). In most cases, the reasons for expatriate failure are the challenges that were explained in the preceding section (Jassawalla, 2014; Haile & White, 2019; Tahir & Egleston, 2019). Tahir and Egleston (2019) argue that a big share of expatriate failures happens due to imprecision in the first stage of the expatriate management process. In addition to that, the authors indicate that an expatriate manager needs to be content during all stages of the process in order not to fail, so the challenges explained should be conquered by MNCs (Tahir & Egleston, 2019). Jassawalla (2014) also relates expatriate failure to the challenges mentioned and cites the inability of the expatriate manager to successfully adapt to the new culture as a key reason for expatriate failure. Haile and White (2019) concur with this finding and add the lack of preparation for the expatriate manager and their family and family-related issues as reasons for expatriate failure. As a consequence, a considerable number of expatriate managers return to their home country before the international assignment has been completed, which is called expatriate failure (Tahir & Egelston, 2019). The consequences of expatriate failure are not to be ignored: MNCs lose considerable money, their reputation might be tarnished and the relationships between the MNC and their local partners might be disrupted (Tahir, 2018; Haile & White, 2019). As mentioned earlier, the failure rate in international assignments varies between 10 and 80 per cent (Tahir & Egleston, 2019). Dousin and Sulong (2021) narrowed down these percentages, stating that 10–20 per cent of expatriate managers from the US returned prematurely from their international assignments. In addition, the authors point out that one-third of the US expatriates who completed their international assignment successfully

were found to not perform adequately in their new jobs in the host country and one-fourth of the same group left the MNC within one year after their repatriation (Dousin & Sulong, 2021). Haile and White (2019) report the percentage of expatriate failure internationally to be at 21 per cent and the percentage of expatriate managers leaving their MNC within one year after their repatriation at 23 per cent. The costs of each expatriate failure have been estimated to be between \$40 000 and \$1 000 000 (Haile & White; Tahir & Egleston, 2019). These costs are based on three different sources: \$250 000 to \$1 000 000 per failed assignment was reported by Peng (2018, cited in Haile & White, 2019); \$100 000 was noted by Misa and Fabriacatore (1979, cited in Haile & White, 2019); and \$40 000 to \$1 000 000 was declared by Yeaton and Hall (2008, cited in Haile & White, 2019).

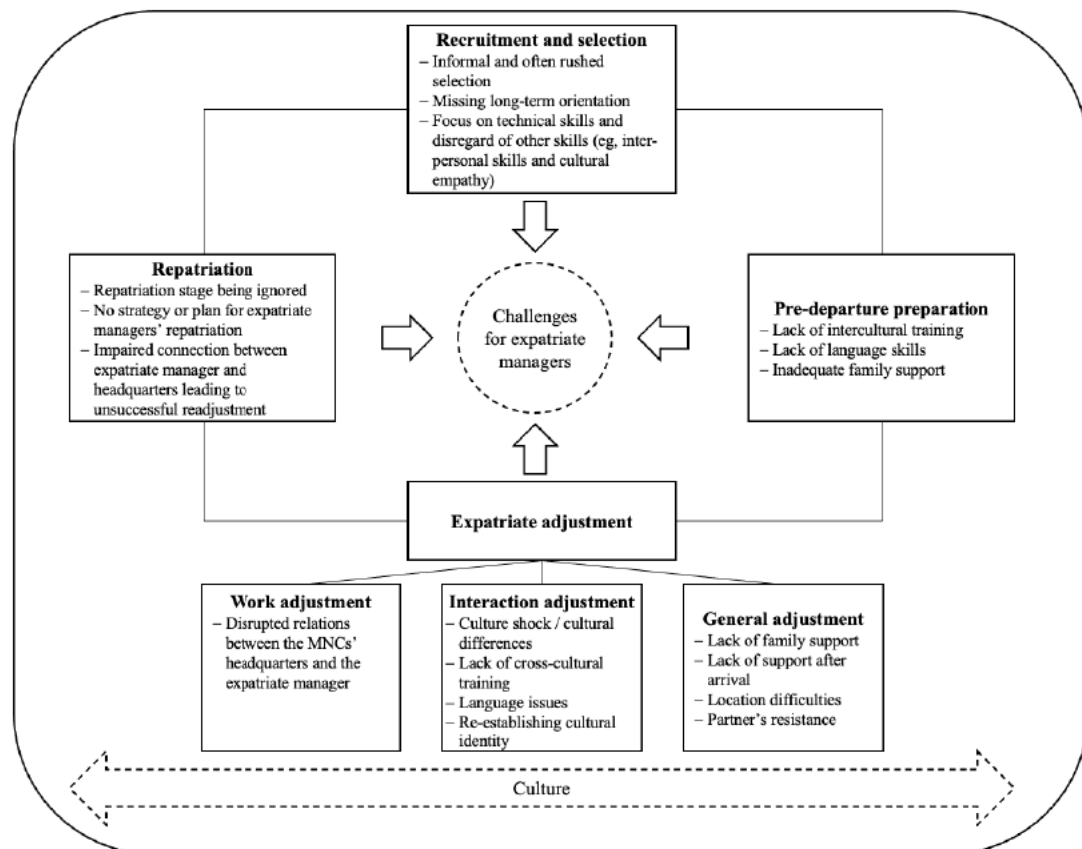


Figure 2.5: Conceptual model

Source: Researcher's own construction

In view of the various challenges presented in the preceding sections, the following conceptual model (Figure 2.5) is presented that sheds light on several concepts used in this research and their links with the challenges expatriate managers experience during their international assignment. Based on Figure 2.5 it is evident that expatriate

managers are exposed to several challenges emanating from the various stages of their international assignment. Besides the various challenges identified, cultural differences seem to play an important role during the international assignment. To this effect, the literature revealed that culture can be linked to several of the identified challenges.

## 2.4 SIMILAR STUDIES

To conclude this section, the research gap that was identified is explained by summarising the literature review. Although the preceding sections explored existing studies on the challenges expatriate managers face during their international assignment, these reviews were purely focused on the challenges in each stage of the expatriate management process. The following section thus provides a comprehensive and broader overview of studies on expatriate management that were reviewed in the context of the current study. In this respect, the topics of global talent management, international assignments and expatriate management are covered.

It must be noted that most of the studies in the field of GTM are rather general, based on non-empirical studies only and do not focus on expatriate management in a specific region or country. Collings *et al.* (2009), for example, examined the literature on global staffing to point out issues that could guide future research, whereas Caligiuri and Bonache (2016) reviewed the literature on global mobility in organisations to highlight the issues in this regard. Przytula (2018) reviewed the literature to analyse and present the correlation between GTM and expatriate management and Collings (2014) integrated the two areas of GTM and global mobility to show that this integration can add value to the MNC. Last, Tarique and Schuler (2018) created a multilevel framework to understand GTM systems for highly qualified expatriate managers. As said, these studies have a broad perspective and are based on a literature review only.

Studies that were reviewed on the more narrowly focused topic of expatriate management are mostly centred on the perspective of the MNC's headquarters and not on the perspective of the expatriate managers in the host countries. Collings *et al.* (2007) explain in their study the challenges of global staffing and the conventional international assignment. They point out that MNCs face challenges such as the lack of

qualified managers who can be placed on international assignments, the high costs of international assignments, and the growing demand for expatriate managers due to the rapid growth of emerging markets and changing career attitudes (eg, a decreasing commitment to specific companies and an increasing importance of self-initiated international assignments). As alluded to earlier, these challenges are experienced by MNCs and not specifically by expatriate managers before, during and after their international assignment.

Schuler *et al.* (2011) illuminate a similar point of view by explaining the challenges of global talent management. The challenges mentioned by the authors are both talent shortages and talent surpluses, compensation levels, and locating and relocating employees (Schuler *et al.*, 2011). Also, Schuler's study is a non-empirical study only and concentrates on the challenges from the perspective of both the MNC and the home country.

Studies from a country or the South African perspective include those by Harry *et al.* (2019), Schmitz *et al.* (2019) and Vaiman *et al.* (2015). However, these studies focused mostly on self-initiated expatriate managers or on the perspective of the host-country nationals and not on the perspective of the expatriate managers in the host country. Harry *et al.* (2019) outline the challenges that self-initiated expatriate managers in South Africa experience. This study is limited to the context of higher education institutions, as the unstructured interviews were conducted with 25 self-initiated expatriate academics of a university in the Eastern Cape of South Africa. The challenges that Harry *et al.* (2019) identified are divided into life experiences and career experiences. The challenges with regard to life experiences include those with immigration, social adjustment, and the separation of families. The challenges regarding career experiences are factors such as differences in salaries, communication problems, limited career opportunities, gender discrimination, a lack in work-life balance and the non-availability of accommodation. Vaiman *et al.* (2015) also focused on self-initiated expatriates and especially in the context of challenges in GTM. The authors analysed the elements of GTM (such as recruitment, selection, development and the retention of talented employees) and the ways in which these elements can be applied to ensure an efficient involvement of self-initiated expatriates. Consequently, Vaiman *et al.*'s (2015) study combined the headquarters' view with that of the host-country, but it is also not an empirical study. Based on previous

research, Schmitz *et al.* (2019) analysed the HCN's perspective and shifted the focus to the HCN's role in the expatriate management process.

Studies that are most similar to the present study are those of Jassawalla (2004), Haile and White (2019), Sterle *et al.* (2018), Tahir and Egleston (2019), Tahir (2018), Dousin and Sulong (2019) and Wilczewski *et al.* (2019). However, these studies focused on one part only of the expatriate management process or on a country other than South Africa. Jassawalla (2014) investigated the expatriate adjustment stage by examining the effect that cross-cultural conflict had on the expatriate manager's adjustment to the new culture. The author found that implementing the following measures reduced the risk of cross-cultural conflict and therefore enhanced the expatriate's adjustment: extensive cross-cultural training in cultural aspects, interpersonal skills and conflict management; sending the expatriate manager to their new location once or twice before the actual assignment starts; and selecting candidates who have a high level of emotional intelligence. Haile and White (2019) examined expatriate failure, the reasons for expatriate failure and how expatriate failure can be turned into expatriate success. Sterle *et al.* (2018) also centred on the expatriate adjustment stage, and more specifically on the adjustment of the expatriate manager's family. All three studies mention several challenges that expatriate managers experienced during their international assignments, which were elaborated on earlier in Chapter Two (see section 2.3). However, all three studies are neither based on a specific country nor on primary research.

As discussed earlier in Chapter Two (see section 2.3.1), the quantitative study by Tahir and Egelston (2019) and the qualitative study by Tahir (2018) both focused on the challenges expatriate managers experienced in the UAE during the expatriate management process and are very similar to the current study. The researchers found that a strategic expatriation process needs to be offered to expatriate managers relocating to the UAE, including strategic selection and recruitment, relevant and specific cross-cultural training, support for the expatriate manager and their family after arriving in the UAE and a clear strategy regarding the expatriate's repatriation (Tahir, 2018; Tahir & Egleston, 2019). However, these challenges and findings cannot be transferred to South Africa based on the existing literature.

The focus of the qualitative study by Dousin and Sulong (2019) was on cross-cultural challenges that expatriate managers experienced during their international assign-

ment in the Kingdom of Saudi Arabia. The authors highlight three main findings: a culture shock, non-existence of pre-departure training and the expatriate's general need for comprehensive cross-cultural training. Last, Wilczewski *et al.* (2019) carried out qualitative research on collaboration challenges one expatriate manager experienced during her international assignment in Asia (see Chapter Two, section 2.3.2). The main finding of their study is that the expatriate manager experienced immense collaboration challenges during the first months of her international assignment, although she had extensive prior international experiences and knowledge.

To summarise, most of the aforementioned studies are based on a literature review only with no empirical underpinning, or they are in general with regard to GTM and expatriate management, or the studies consider the headquarters' view only. Studies on the challenges that expatriate managers experience in specific countries cannot be transferred to South Africa without evidence. Consequently, the topic of the challenges that expatriate managers experience during their international assignment in South Africa has not been studied thoroughly yet.

## **2.5 CONCLUSION**

Chapter Two provided a detailed overview of the extant literature on expatriate management and the challenges that expatriate managers typically experience. Key concepts were identified and explained, the cultural differences between the countries that formed part of the study were pointed out, the models that pose the framework for this study were presented and analysed, and the challenges that expatriate managers experience during their international assignment were illustrated. This chapter concluded with an analysis of similar studies to highlight the research gap that this study was based on.

In terms of the purpose and title of this study, this chapter formed a basis for identifying possible challenges that expatriate managers experienced (and expected to experience with regard to their repatriation) relating to the MNC's expatriate management process. The chapter also shed light on cultural aspects that provide more context on the challenges that were identified. As such, the research objectives and questions that align to purpose of the study as set out in Chapter One (see section 1.4) have been partially addressed in Chapter Two. The challenges identified in this chap-

ter will be investigated empirically by adopting a suitable research design and methodology as discussed in the next chapter.

## **CHAPTER THREE: RESEARCH DESIGN AND METHODOLOGY**

### **3.1 INTRODUCTION**

In Chapter Two a literature review was presented on the broader topic of expatriate management and the challenges expatriate managers experience relating to the expatriate management process. An introduction and contextualisation of expatriate management was considered, along with the rationales for expatriate management, an explanation of international assignments, global talent management (GTM) and the cultural differences between South Africa and Germany. A description of the models that were used for the study's theoretical framework was offered, followed by the challenges experienced during each stage of the expatriate management process. The chapter concluded with an analysis of previous research on the topic of expatriate management, clearly highlighting the gaps in current literature on expatriate management.

In this chapter, the research design and methodology is introduced based on the 'research onion' concept by Saunders *et al.* (2019). Aspects that are covered are the research philosophy, the research approach to theory development, methodological choice, the research strategy and context, time horizon and data collection and analysis.

### **3.2 RESEARCH PHILOSOPHY**

The research philosophy points the researcher in a particular direction in the field of study, the research design and plan, and the interpretation of the results (Bryman, 2012; Leedy & Ormrod, 2015). The most common paradigms are positivism, interpretivism and critical realism (Du Plooy-Cilliers, 2021). In the current study, the interpretivism paradigm was followed. In contrast to the positivism paradigm that is mostly empirical in nature and aims to explain causal relationships, the interpretivism paradigm is about developing an in-depth understanding of reality. Interpretivists want to understand the behaviour of human beings and to see the world through their eyes in order to explore what is important to them (Du Plooy-Cilliers, 2021). This paradigm goes hand in hand with the purpose of the current study in which hypotheses were not formulated to explore causal relationships. Instead, the

challenges were explored in depth to obtain an understanding of these challenges, their origins and the situation of the expatriate manager. In other words, the interpretivist approach comprised a subjective analysis to gain insights into the challenges associated with the expatriate management process by observing the world through the eyes of the expatriate manager.

### **3.3 RESEARCH APPROACH TO THEORY DEVELOPMENT**

For this study, an inductive approach to theory development was used. An inductive approach starts with observations (Leedy & Ormrod, 2015; Saunders *et al.*, 2019), followed by a qualitative analysis of the observations to ultimately develop a theory (Miessler, 2020). On the other hand, a deductive approach starts with an idea, theory, or assumption, which is then followed by observations and a conclusion (Leedy & Ormrod, 2015; Miessler, 2020). The inductive approach was chosen as the most appropriate approach for the current study as its conclusions were based on observations (in this case, semi-structured interviews) and not on assumptions or an idea. To this end, in-depth interviews were conducted with expatriate managers about the challenges they experienced and expected to experience during their repatriation.

### **3.4 METHODOLOGICAL CHOICE**

This study followed a qualitative research methodology. Qualitative research explores the subjective experiences that participants associate with a phenomenon, meaning that an in-depth analysis is done of what the participant experiences, perceives, and attaches to a specific situation (Bezuidenhout & Strydom, 2021). Quantitative research, on the other hand, aims to measure and quantify a specific situation or issue (Bezuidenhout & Strydom, 2021), which was not deemed sufficient for the current study. The challenges expatriate managers experience and expect to experience should not be quantified, measured or hypothetically tested, but rather be explored in-depth to understand the reasoning for these experiences and to provide meaningful recommendations. Further, an authentic and subjective understanding of the participants' experiences should be created, which is only possible with a qualitative method. A further reason for choosing a qualitative methodology is that the literature revealed a lack of qualitative studies in the field of expatriate management. Research that was found was specifically based on a pure literature review (eg, Caligiuri & Bonache, 2016; Tarique & Schuler, 2018) or consisted of quantitative stud-

ies (eg, Wain, 2018; Tahir & Egleston, 2019), meaning that an in-depth understanding and insight of the challenges expatriate managers experience during their international assignment – especially in the context of South Africa – is scarce. Consequently, to explore the subjective experiences and perceptions of expatriate managers in-depth and to contribute to a study in a field of research where a lack of in-depth studies was revealed, the qualitative method was deemed the most appropriate.

### **3.5 RESEARCH STRATEGY AND CONTEXT**

The study followed the case study strategy. The case study strategy explores a research topic in its context (Saunders *et al.*, 2019), which means that the phenomenon (in the current study, the challenges experienced by expatriate managers) is explored in depth to gain ‘a full and thorough understanding of the particular and lived experience of a participant’ (Bezuidenhout & Strydom, 2021: 208). The case study strategy is applicable to answer questions like ‘why?’, ‘what?’ and ‘how?’ (Saunders *et al.*, 2019).

Semi-structured interviews (see Chapter 3, section 3.7.4) were conducted with employees of two selected companies, which provided the context of the study. These companies were MNCs with headquarters in countries other than South Africa, but subsidiaries in South Africa. Interviewing expatriate managers working for these companies facilitated the researcher to gain a comprehensive understanding of the challenges the expatriate manager experienced and expected to experience in the context of their international assignment. The research participants from these MNCs were representative of the target research population and are further explained in the sections that follow.

### **3.6 TIME HORIZON**

Owing to the fact that the time period was limited to conduct the research, the study was cross-sectional in nature, which means that data were collected at a specific point in time. In contrast to that, a longitudinal study would collect data over several months or years (Leedy & Ormrod, 2015), which was not suitable for the current study.

### **3.7 DATA COLLECTION AND ANALYSIS**

Several aspects relating to the study's research population, sampling method and size, interview questions, data collection and analysis, and the ethical considerations are discussed in the subsequent sections.

#### **3.7.1 RESEARCH POPULATION**

As explained in the preceding section, a qualitative research methodology was chosen for this study. The target population comprised all expatriates from foreign countries such as the US, Canada, Australia and the European countries who were on an international assignment in South Africa at the time of the study. According to Hrubenja (2022), approximately 2.85 million expatriate managers live in South Africa, 4.82 per cent of them being South Africans. However, Hrubenja (2022) also points out that there is no clear line between 'immigrants' and 'expatriate managers', therefore the author mentions that numbers might be slightly lower. Since there is no database that contains the contact details of all expatriate managers in South Africa, the accessible population consisted of expatriate managers from foreign countries being on an international assignment in the Gauteng province of South Africa. Furthermore, given that Western MNCs are increasingly expanding their businesses to the African continent (Abugre, 2017), the focus in the current study was on – but not limited to – expatriate managers working for Western MNCs. The expatriate managers working for Western MNCs also formed the sampling frame of this study (Pascoe, 2021).

#### **3.7.2 SAMPLING METHOD**

As mentioned, no database was available to access the whole population (or even the accessible population) of expatriate managers in South Africa or Gauteng, which excluded the use of probability sampling (Pascoe, 2021). Given that access to the whole population was not possible, this study employed a non-probability sampling method. Although the representativeness of a sample is not a critical factor in non-probability sampling as opposed to probability sampling (Pascoe, 2021), the sample still represented the research population to some extent and the results could be generalised, albeit it to some degree. To be more precise, the sampling method involved a combination of convenience and snowball sampling. In convenience sampling, interviewees are usually people the researcher knows or has easy access to (Pascoe,

2021). In the current study, the researcher interviewed expatriate managers (unit of analysis) from two MNCs the researcher could gain access to easily. In this respect, both MNCs are German MNCs, meaning that their headquarters are in Germany. As the researcher was familiar with the MNCs where the respondents were employed and had easy access to these companies, it reduced the risk of not obtaining permission in time or at all. Appropriate ethical protocols were followed (see section 3.7.5) to obtain permission to interview participants from specific companies and ethical clearance from the IIE MSA was obtained to conduct the research in question.

To participate in the study, expatriate managers had to be on their international assignment in South Africa for at least six months. This ensured that the participant had already passed through the process stages of recruitment and selection and pre-departure training and had already gained some experience about the expatriate adjustment, to eventually be able to provide insightful responses on the challenges they had experienced. As there was a chance of convenience sampling not leading to a point of saturation, the snowball sampling technique has also been used. It was however restricted to the individuals working for the companies where a signed gatekeeper's letter has been obtained. The snowball sampling technique is typically used in cases where the researcher does not have access to a database listing all the members of the population (Pascoe, 2021). In every interview conducted, the researcher asked the expatriate managers for further contacts that fulfil the requirements and might be willing to get interviewed. The contact details of these recommendations have been shared with the researcher after permission to do so was obtained. These recommendations were then contacted as the point of saturation has not been reached after interviewing the willing expatriate managers in the convenience sampling.

### 3.7.3 SAMPLING SIZE

Since this study used a qualitative research methodology, there was no predetermined sampling size. Instead, the researcher interviewed the participants until a point of saturation was reached. This was the point where no new information was collected in the interviews (Pascoe, 2021). In this regard, seven participants were interviewed. More detail concerning the sample size and point of saturation is provided in Chapter 4 (see section 4.2.1).

### 3.7.4 DATA COLLECTION PROCEDURE

Semi-structured interviews were conducted to collect data on the challenges that expatriate managers experienced and expected to experience about their recruitment and selection, preparation, adaptation and repatriation, during and after their foreign assignment in South Africa. Semi-structured interviews enabled the researcher to ask further questions, to obtain, for example, a more detailed explanation or clarification about a certain point the participant made. Further, the non-verbal reactions of participants during the interview were used as an additional source of data (Leedy & Ormrod, 2015; Bezuidenhout & Strydom, 2021). Semi-structured interviews were deemed appropriate for this study, to ensure that a specific agenda was followed and to make provision for deeper investigations by asking additional questions. With regard to pilot testing, questions were reviewed by two individuals to ensure that no sensitive questions or topics were included in the measuring instrument. No company names or names of the interviewees are mentioned in this dissertation. In line with the research plan, the researcher allocated two months for the purposes of data collection.

Two strategies were followed during the data collection: effective listening and the gathering of non-verbal data. Effective listening means that the interviewer needs to listen carefully to what the interviewee says to obtain the information the researcher needs (Bezuidenhout & Strydom, 2021). The purpose of the study and its associated data collection and analysis methods were explained to the participants before they were interviewed; therefore, non-verbal data were collected by making notes during the interview on non-verbal communication when it was possible or necessary. The interviews consisted of open-ended questions that were asked clearly and simply, ranging from broad to narrow questions (Bezuidenhout & Strydom, 2021).

The interview started with a few introductory questions about the participant's professional background to ensure that the participants met the criteria to participate in the study. The introductory questions were followed by questions to identify the challenges that the expatriate manager had experienced and had expected to experience during their international assignment. These questions addressed the research questions and were based on the models by Ozdemir and Cizel (2007) and Black (1988) (see Chapter Two, section 2.2.4). For the first three process stages, the partic-

ipant was asked to describe the ways in which the stages were conducted during the process of their international assignment. These questions were asked to ensure that the participant reflected on their experience and facilitated them to remember the challenges they experienced. As the interview questions were semi-structured, the researcher had the opportunity to prompt certain challenges that were identified (see Chapter Two, section 2.3) depending on the participant's responses. Annexure A provides a detailed overview of the measurement instrument that was used.

To enhance the trustworthiness and rigour of the study, the four principles of credibility, transferability, dependability and confirmability were followed. The principle of credibility ensures that everything the interviewee says will be interpreted in a credible way (Koonin, 2021). In the current study, credibility was ensured by allowing the participant to inspect the transcriptions of their interview and by using the direct quotes obtained from them during the interview in the data analysis. The principle of transferability refers to the extent to which the results can be applied to a different population or setting (Koonin, 2021). In the current study, transferability was ensured by providing a detailed description of the research context and the data collection methods. Furthermore, the details of the participants were also provided but, to guarantee their confidentiality, the details were provided only in as far as the participants had given their permission. The researcher interviewed participants with a diverse profile, considering their gender, age, length of stay in South Africa, and their family situation, which enhanced the transferability of the study. The principle of dependability pertains to the excellence of the integration process between the theory, the data collection technique and the data analysis (Koonin, 2021). It was implemented by providing a transparent and detailed presentation of the research design and plan. The last principle, the principle of confirmability, was followed to ensure that the obtained data braced the interpretation. A reflexive process (reflexivity) was used in this respect, which included reflecting on one's assumptions and biases, as well as maintaining a certain degree of awareness and openness towards the study and its results (Koonin, 2021).

### 3.7.5 ETHICAL CONSIDERATIONS

In this research, the ethical guidelines provided in the IIE MSA Research and Postgraduate Studies Policy were followed. Before the interviews commenced, the re-

searcher handed out an informed consent form to the participant. The template for this form is provided in Annexure B with the title ‘Participant or Respondent Consent Form’. This form informed the participant about the purpose of the study, the approximate length of the requested interview, the details of what would be required from them as participants, and how the data collected from the interviews would be used (Louw, 2021). It was made clear that only if the participant gave their consent, the researcher would start with the interview. The consent form further informed the participant that the data collected and their personal information would be private and would be treated with confidentiality. This assured the participant that the researcher would never share the participant’s identity with anyone, although the researcher would be able to connect the identities with the responses (Louw, 2021). The participant was informed that the collected data formed part of a master’s study that could lead to a publication. However, all information would still be treated with the strictest confidentiality and all respondents and companies would remain anonymous. The data collected in the interviews would be used for research purposes only. The respondents would not have any major risk by participating owing to their confidentiality being guaranteed. Furthermore, their participation would be voluntary, they would have the right to withdraw from the interview at any stage and they could also refuse to answer certain questions. If they so wished, participants could request a summarised version of the study once completed by contacting the researcher using the contact details provided on the consent form. This offer provided an incentive for the participant to take part in the study. Last, the form advised the participants that they could contact the researcher at any stage using the provided contact details in case they had any questions.

To transcribe the interviews, the researcher asked the participants for their permission to record the interviews. These interviews consisted of an audio recording for physical meetings and a video recording for the interviews conducted via Microsoft Teams. To obtain the participant’s permission, the template in Annexure C with the title ‘Audio or Video Recording Consent Form’ was used. This document informed the participant about the confidentiality and storage of the recordings. These recordings and all other data that were collected in the interviews or data that were connected to the participant (consent and permission forms, transcribed interviews, and recordings), would be kept in a secure online cloud (Onedrive folder) for five years. The participant was also assured that the researcher and the researcher’s supervisor

were the only people with access to the password-secured OneDrive account as well as to the folder. The data would be destroyed and deleted from the OneDrive Account after the five-year period.

Because the participants were asked about the challenges they had experienced and expected to experience during their international assignment, and the fact that their responses referred to the processes implemented at the company they had worked for, permission from the company's Human Resources Department or Managing Director to interview the participants was obtained prior to the interviews. Further, the option to already inform the potential participants about the researcher contacting them has been given to the signatory of this permission form. The Gatekeeper's letter that was used for this purpose can be seen in Annexure D.

As no vulnerable groups were interviewed and no sensitive topics were covered, no major ethical risk was identified.

The ethical clearance letter for this study can be seen in Annexure E.

### 3.7.6 DATA ANALYSIS

To analyse the data collected from the interviews, thematic analysis was primarily used, which is similar to qualitative content analysis (Bezuidenhout & Cronje, 2021). Thematic analysis is 'a method for identifying, analyzing and interpreting patterns of meaning ("themes") within qualitative data' (Braun & Clarke, 2016: 297). Thematic analysis is not concerned with summarising the data that has been collected, but rather about identifying and interpreting features of the data that are relevant to the research question (Braun & Clarke, 2016). As part of a thematic analysis, codes, categories and themes are generated from the qualitative data. Codes identify interesting aspects of the collected data that may be pertinent to the research question. They are the most detailed and smallest units of thematic analysis and are clustered into categories (Braun & Clarke, 2016; Lester, Cho, Lochmiller, 2020). The categories group together individual codes that are linked either analytically or conceptually and constitute a significant step in the process of generating themes (Lester *et al.*, 2020). Based on these categories, themes are developed by merging various related categories. Relations can either be differences, similarities or relationships across categories

(Lester *et al.*, 2020). According to Lester *et al.* (2020: 101), ‘themes are generally aligned with the conceptual or analytic goals of the study and therefore are designed in response to the study’s primary research questions or focus’. Thematic analysis is a popular and suitable tool to analyse qualitative data and it is specifically applicable to analyse experiences, perceptions and understandings (Herzog, Handke & Hitters, 2019).

In contrast to thematic analysis, qualitative content analysis is typically used for larger datasets as qualitative content analysis describes the data and does not interpret the data (Herzog *et al.*, 2019). Whereas thematic analysis generates high-level themes, qualitative content analysis focuses on how frequent specific keywords or concepts occur in the data (Ho & Limpaecher, 2023). The measuring of frequency in qualitative content analysis constitutes a possibility of quantifying the data, which outlines the main difference between qualitative content analysis and thematic analysis, namely that in the latter a theme is not being generated based on the frequency of its appearance (Ho & Limpaecher, 2023). Thus, thematic analysis is in line with the research question of the current study, which focused on the experiences and expected experiences of expatriate managers.

Lester *et al.* (2020) suggest a seven-phase process to describe the different phases of thematic analysis:

1. Preparing and organising the data for analysis.
2. Transcribing the data.
3. Becoming familiar with the data.
4. Memoing the data.
5. Coding the data.
6. Moving from codes to categories to themes.
7. Making the analytical process transparent.

Phase one is about preparing and organising the data that were collected during the interviews to be analysed. This includes saving the recorded interview files in one folder and location, converting the written notes into an electronic format (eg, observations, non-verbal communication, etc) and scanning documents (eg, signed informed consent form). Each file should be named in a structured way (Lester *et al.*, 2020).

In phase two the audio and video data are transcribed. On the one hand this phase prepares the data for further analysis and, on the other hand, the phase gives the researcher a first impression of the data (Lester *et al.*, 2020).

Phase three is concerned with becoming familiar with the data. While reading through the transcripts, the researcher can also make some first notes of the experiences the participant described (Lester *et al.*, 2020).

In phase four the researcher generates memoranda (memos) while reviewing the data. These memos can be emerging interpretations, initial reflections or they can capture any parts of the data that describe experiences that may be relevant to the subsequent analysis (Lester *et al.*, 2020).

In phase five the researcher codes the data, which means that the researcher will label specific parts of the data by adding short, descriptive words. Lester *et al.* (2020) recommend at least three coding phases. In the first coding phase, codes are assigned to the whole dataset to identify important experiences. In the second and third coding phases, the researcher revisits the coded sections and assigns additional codes. These codes should be at a more abstract level of inference, as experiences should be connected and should further be seen in relation to concepts and ideas that directly refer to the study's focal point (Lester *et al.*, 2020).

In phase six, codes are developed into categories and these categories are developed into themes. First, the relationships between the codes are analysed to aggregate them into categories. Second, themes are produced by collating several related categories. As mentioned earlier, the categories can be brought together according to similarities, differences and relationships. The themes are then named. On the one hand a theme's name should include the relationship between the categories and a brief content description and, on the other hand, the theme's name should be inclusive of all categories (Lester *et al.*, 2020).

In the seventh and last phase the analysis process is made transparent, which means that the data about, for example, key choices, must be presented in a transparent manner (Lester *et al.*, 2020).

This process of seven phases as described by Lester *et al.* (2020) was also followed in the current study. All requirements such as preparing and organising, transcribing, coding and categorising data were met in this study as discussed in Chapter 4 (see section 4.4).

### 3.8 CONCLUSION

In conclusion, this chapter provided a detailed explanation of the research design and methodology by covering all aspects of the research onion by Saunders *et al.* (2019). To this effect, various decisions relating to the research philosophy, approach to theory development, methodological choice, research strategy and time horizon were discussed and justified. In addition, the data collection and analysis techniques and procedures that were employed in this study were explained and justified, providing a clear overview of the data collection and analysis plan in this study. The different research methods that were chosen for this study are illustrated in Figure 3.1.

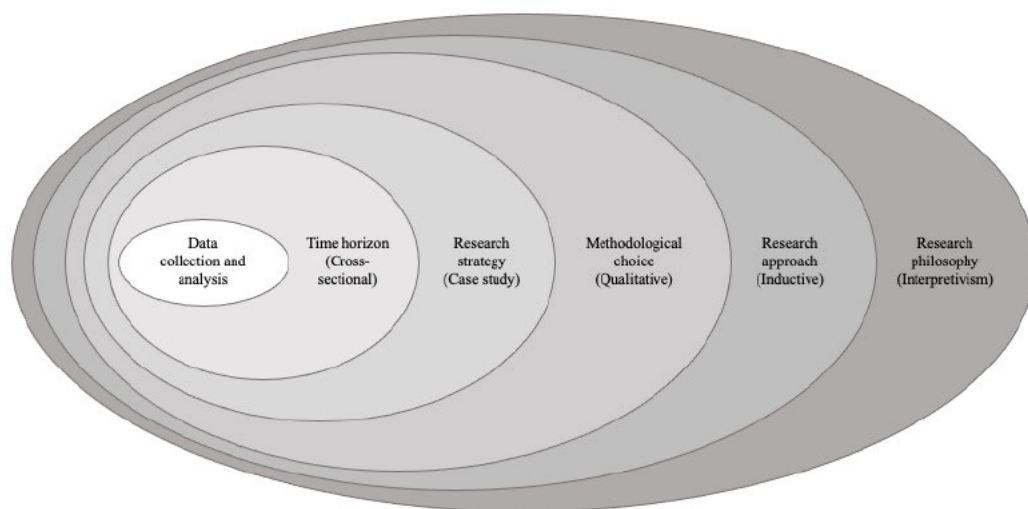


Figure 3.1: Research design and methodology for the present study

Source: Researcher's own construction based on Saunders *et al.*, 2019.

The next chapter will address several aspects related to the empirical investigation.

## **CHAPTER FOUR: DATA ANALYSIS AND INTERPRETATION**

### **4.1 INTRODUCTION**

Chapter Three provided a comprehensive overview of the research design and methodology that was applied in this study. The chapter included the research philosophy, research approach to theory development, methodological choice, research strategy and context, time horizon as well as the data collection and analysis. The presentation of the data collection and analysis further included the research population, sampling method and size, data collection procedure, and ethical considerations.

In Chapter Four, the data collected in the semi-structured interviews are presented, analysed and interpreted in relation to previous empirical findings. First, an overview of the demographic profile of the respondents is given, which includes the sample size and a description of the participants. Based on Chapter Three, the data collection strategies and their implementation are demonstrated in more detail. Thereafter, the data analysis process by means of thematic analysis is disclosed. Chapter Four concludes with a detailed explanation of the themes, categories and codes that were generated from the dataset.

### **4.2 DEMOGRAPHIC PROFILE**

The demographic profile of the participants presented in the following two sections consists of the sample size and a description of the respondents. The section also elaborates on the duration of the participants' stay in South Africa, their country of origin, and the number of international assignments the participants had participated in, which included their current assignment – that is, the assignment that they were on at the time of the interviews.

#### **4.2.1 SAMPLE SIZE**

As explained in Chapter Three (see section 3.7.2), the semi-structured interviews were conducted at two German MNCs in Gauteng, South Africa and the sampling method used was a combination of convenience sampling and snowball sampling. Seven interviews were conducted: six participants were sampled with the convenience sampling method and one participant with the snowball sampling method. The

interviews came to an end after the seventh interview, as the point of saturation was reached. From the beginning of the interviews, it was observed that the respondents provided different answers regarding the challenges they had experienced, which was due to, among other things, their different family situations. Except for one or two challenges that were mentioned in most of the interviews, a point of saturation was observed from the fifth interview onwards, leading to a final point of saturation and the end of the data collection after the seventh interview.

#### 4.2.2 DESCRIPTION OF RESPONDENTS

As mentioned in Chapter Three (see section 3.7.4), the interviews started with a few introductory questions about the participant's professional background. These questions were asked to ensure that the participants met the criteria (see Chapter Three, section 3.7.2) to participate in the study and to provide a short description of each respondent. A brief description of the participants is shown in Table 4.1.

| <b>Participant</b> | <b>The participant is in South Africa since</b> | <b>Country of origin*<sup>1</sup></b> | <b>Number of international assignments*<sup>2</sup></b> | <b>Gender</b> | <b>Age</b>  |
|--------------------|-------------------------------------------------|---------------------------------------|---------------------------------------------------------|---------------|-------------|
| Participant 1      | November 2019                                   | Germany                               | 2                                                       | Male          | 50–60 years |
| Participant 2      | June 2022                                       | Germany                               | 2                                                       | Male          | 40–50 years |
| Participant 3      | June 2022                                       | Germany and Iran                      | 2                                                       | Male          | 40–50 years |
| Participant 4      | September 2017                                  | Germany                               | 1                                                       | Female        | 50–60 years |
| Participant 5      | September 2015                                  | The Netherlands                       | 2                                                       | Male          | 50–60 years |
| Participant 6      | January 2021                                    | Switzerland                           | 1                                                       | Male          | 30–40 years |
| Participant 7      | November 2021                                   | India                                 | 3                                                       | Male          | 30–40 years |

\*<sup>1</sup>Note: The country of origin refers to the country the participant was born / grew up

\*<sup>2</sup>Note: The number of international assignments includes the current assignment

Table 4.1: An overview of the participants

Source: Researcher's own construction

As can be seen in Table 4.1, Participant 1 was originally from Germany and had been on his international assignment in South Africa since November 2019. At the time of the study, he was on his second international assignment. Participant 2 was also originally from Germany and had been in South Africa since June 2022. Participant 3

also arrived in June 2022, he originally was from Germany and Iran and was also on his second international assignment. Participant 4 was on his first international assignment, had been in South Africa since September 2017 and also hailed from Germany. Participant 5 was from the Netherlands and arrived in South Africa in September 2015. Before he relocated to South Africa, he was working in the Dutch subsidiary of his company. He was still on his international assignment in South Africa at the time of the interview, but since had to return (temporarily) to the Netherlands due to visa limitations. It was his second international assignment. Although Participant 6 originated from Switzerland, he was based in Germany working for the headquarters of his company, and on his first international assignment. He started working in March 2020, but due to COVID-19 restrictions he could only transfer to South Africa in January 2021. The last participant, Participant 7, was originally from India and moved to South Africa in November 2021. He was on his third international assignment and worked for the Indian subsidiary of his company before he relocated to South Africa.

In summary, the participants had lived in South Africa for between one and eight years, came from four different countries, three of which were European countries, and the participants were either on their first, second or third international assignment. Six out of the seven participants were male and one was female, whereas the participants' ages were well distributed between the ages of 30 and 60 years. Five of the seven participants worked for the German headquarters of their company before relocating to South Africa, the other two participants worked for subsidiaries in the Netherlands and India. These participants had the necessary experience and background to provide more insight into the main research question, namely 'What are the challenges that expatriate managers experienced and expected to experience about their recruitment and selection, preparation, adaptation and repatriation, during and after their foreign assignment in South Africa?'

### **4.3 DATA COLLECTION STRATEGIES**

To explore and analyse the participants' experiences in a more holistic and nuanced manner, the strategies of effective listening and the gathering of non-verbal data were employed. In the following sections, the implementation of these strategies is discussed first, followed by an explanation of the four principles that were followed to

ensure the trustworthiness and rigour of the study.

#### 4.3.1 EFFECTIVE LISTENING

The first strategy that was used during the data collection is effective listening. As outlined in Chapter Three (see section 3.7.4), this strategy implies that the researcher must listen carefully to the participant to be able to obtain the data that the researcher needs. This strategy was used in combination with the semi-structured interviews to obtain more detailed insights about a specific point that the participant had made. Further, it ensured that the analysis was not based on assumptions, as any unclear statements made by a participant were investigated thoroughly and were listened to effectively.

The fact that all the participants allowed the researcher to record the interviews enhanced the strategy of effective listening as it was not necessary to make written notes on the participant's answers. As a result, the researcher was able to concentrate fully on what the respondent was communicating during the interviews.

#### 4.3.2 GATHERING OF NON-VERBAL DATA

The second strategy that was used during the data collection is the gathering of non-verbal data. As explained in Chapter Three (see section 3.7.4), non-verbal data can be an additional source of data, next to verbal data. Non-verbal data were collected by making notes on the non-verbal communication of the participants during the interviews whenever possible or necessary. Examples of non-verbal communication are a laughter, a smile, or a longer pause.

#### 4.3.3 TRUSTWORTHINESS AND RIGOUR OF THE STUDY

The principles of credibility, transferability, dependability, and confirmability were used (see Chapter Three, section 3.7.4). All principles were followed to enhance the trustworthiness and rigour of the study, which in turn ensured the quality and validity of a qualitative research study (see Chapter Three, section 3.7.4).

The principle of credibility ensured that everything the interviewee stated was interpreted in a credible manner. To this end, the researcher asked every participant if they wanted to see the transcript of the interview. Further, direct quotes from the par-

ticipants were used that are presented in the following sections in this chapter (see section 4.5). The principle of transferability refers to the degree to which the results can be transferred to another population or context. To ensure the transferability of this study, the research context and data collection methods were described in detail in Chapter Three (see section 3.7.4). In addition, the participants represented a diverse profile when considering factors such as their age, gender, family situation and length of stay in South Africa. The principle of dependability pertains to the excellence of the integration process between the theory, the data collection technique and the data analysis. To verify the dependability of this study, the researcher provided a transparent and detailed presentation of the research design and plan in Chapter Three. The last principle, confirmability, ensures that the obtained data braces the interpretation. Confirmability was obtained in the current study by using a reflexive approach (reflexivity) which means that the researcher reflected on her own assumptions and biases, while maintaining a certain degree of awareness and openness towards the study and its results.

#### **4.4 DATA ANALYSIS PROCESS**

As explained in Chapter Three (see section 3.7.6), the researcher used a thematic analysis to analyse the collected data and to eventually answer the research questions of this study. The thematic analysis was divided into seven phases as outlined in Chapter Three (see section 3.7.6). In phase one, the data were prepared and organised for the analysis. This phase included saving the recorded interview files in one folder and location, converting the written notes into electronic format (eg, observations, non-verbal communication, etc) and scanning the relevant documents (eg, the signed informed consent form). In phase two the recorded interviews were transcribed and the observation notes of the non-verbal communication were added to the transcripts. In phase three, the researcher familiarised herself with the whole dataset by reading through the transcripts and making notes of the experiences as described by the participants. In phase four, the data were written in a memorandum ('memo') format, which comprised reading through the transcripts again and generating memos of parts of the transcripts that were deemed relevant for the analysis. Phase five consisted of the coding of the data and was divided into two subphases. In the first subphase the researcher assigned codes to the whole dataset, whereas in the second subphase the coded sections were reviewed and assigned with additional codes of a higher lev-

el of inference. In phase six of the thematic analysis, the codes were developed into categories and the categories were developed into themes. To do so, all the assigned codes were imported into an Excel sheet to inspect for redundant codes. After removing the redundant codes, the relationships between the remaining codes were analysed to aggregate them into categories. Several categories were then collated into themes. In the last phase, the analytical process was made transparent by making all key choices transparent in each chapter. Excel was the only digital tool that was used for the thematic analysis. An overview of the themes, categories and selected codes is presented in Table 4.2 and discussed in more detail in the following sections. A complete list of the codes, themes and categories can be seen in Annexure F. Table 4.2 further includes each phase of the expatriate management process and each theme, category, and code this process related to, as well as sample interview questions and the corresponding research question. Table 4.2 thus provides a holistic overview of the manner in which the main research question was addressed, namely ‘What are the challenges expatriate managers experienced and expected to experience about their recruitment and selection, preparation, adaptation and repatriation, during and after their foreign assignment in South Africa? In line with this table, the themes are presented and discussed in the following section.

#### **4.5 EMPIRICAL FINDINGS**

For the purpose of this study, the discussion of the data analysis and findings is based on the themes that were identified during the data analysis. It should be noted that these themes align with each stage of the expatriate process. Stages one, two and four of the expatriate process each had one correlating theme, whereas stage three had three correlating themes, which corresponds with the theoretical background explained in Chapter Two (see section 2.2.4) and the research questions introduced in Chapter One (see section 1.4). The challenges that were experienced by the respondents during the process of their international assignment were translated into the categories that are analysed in the following sections.

| Phases of the expatriate management process | Sample interview questions*                                                                        | Raw data – sample quotations*                                                                                                                                                                                                                                       | Sample codes*                                                                                     | Categories                                                           | Themes                                                                           | Link to research objectives (RO) / questions (RQ)                                                                                                                                                                                                                                                   |
|---------------------------------------------|----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Recruitment and selection                   | Which challenges did you experience during the selection and recruitment of your current position? | "And I think this is somewhere where companies have to understand that it makes no sense for me to force someone to a delegation or kind of make it a must thing for senior roles or whatever. [...] So I think they must get the feeling that you are interested." | Compulsory international assignments for future leaders without emphasis on essential soft skills | 1.1 Ignoring soft skills during selection                            | Challenges experienced during recruitment and selection for the current position | RO1: To identify and empirically investigate the challenges that expatriate managers experienced during their selection and recruitment.<br><br>RQ1: What are the challenges that expatriate managers experienced during their recruitment and selection for their international assignment?        |
|                                             |                                                                                                    | "you have to fill a lot of papers of course with the information that they anyhow already have."                                                                                                                                                                    | Repetitive tasks                                                                                  | 1.2 Poor internal communication                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "And you don't really know what's happening after"                                                                                                                                                                                                                  | Lack of transparency during selection process                                                     | 1.3 Uncertainty due to company processes and circumstances           |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "It's always a kind of uncertainty – will it really happen or is something popping up that stops the company to select you"                                                                                                                                         | Uncertainty regarding company's selection decision                                                | 1.4 Uncertainty due to external factors                              |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "I guess the biggest challenge is to wait"                                                                                                                                                                                                                          | Long internal process until decision has been made                                                |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "Maybe there are some family topics. It's always a kind of uncertainty."                                                                                                                                                                                            | Possible changes due to family issues                                                             |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "The only issue, what usually we faced is this process started in the year 2020, the famous year for COVID. right. So all the processes, internal processes also got a little bit delayed."                                                                         | COVID-related delays and uncertainties                                                            |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
| Pre-departure preparation                   | Which challenges did you experience during the preparation of your current assignment?             | "especially with this move during COVID, things are a little bit more difficult, arranging logistics, organising things"                                                                                                                                            | Impaired logistics due to Covid                                                                   | 2.1 COVID-related uncertainties                                      | Challenges experienced during the preparation for the international assignment   | RO2: To identify and empirically investigate the challenges that expatriate managers experienced during their preparation for their international assignment.<br><br>RQ2: What are the challenges that expatriate managers experienced during their preparation for their international assignment? |
|                                             |                                                                                                    | "everything was cancelled because of COVID. We couldn't move."                                                                                                                                                                                                      | COVID delaying the move for an indefinite period                                                  |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "I didn't get the opportunity for you know information visit."                                                                                                                                                                                                      | Moving to the unknown                                                                             |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             | Do you think your company has prepared you sufficiently?                                           | "I mean to find the right place to live is a challenge in South Africa, it's not so easy, because at that point of time the market was also quite tough. not so much houses on the market, so it took a while"                                                      | Tough housing market                                                                              | 2.2 Unfamiliar living and working conditions                         |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "one surprise for me was I was had always a company car. And suddenly you have no company car anymore."                                                                                                                                                             | Different company benefits                                                                        |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "if you're doing it for the first time and you're not fully aware of the processes, I think it is quite a challenge."                                                                                                                                               | No understanding of overall process                                                               | 2.3 Poor internal communication on process of expatriate management  |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "There's policy after policy after policy and if you don't invest a lot of time and that's not supposed to be the core responsibility of the transferee."                                                                                                           | No transparent communication of policies                                                          |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "And I think if there was more support in preparation of the move to support dual careers, that would be very helpful."                                                                                                                                             | Lack of partner support                                                                           | 2.4 Unclear situation for partner                                    |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "And even things like getting a work visa, getting guidance on what jobs are available, understanding the market situation in the new country, or completely neglected."                                                                                            | Lack of transparency on partner situation                                                         |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "I had to take the lead actually for most of the topics. I had to take the initiative to apply for my visa at that time"                                                                                                                                            | Need for self-initiative                                                                          | 2.5 Dealing with administrative processes by showing self-initiative |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "There was not so much preparation in that sense."                                                                                                                                                                                                                  | Lack of preparation                                                                               |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "It was offered virtually and we thought it doesn't help us so we decided not to take it."                                                                                                                                                                          | Training not offered on correct platform                                                          |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "I think the cultural training would have helped probably before we come."                                                                                                                                                                                          | Training not timeous                                                                              | 2.6 Training not adequately preparing for assignment                 |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "So as the majority was from Mexico, everything was concentrated on topics which are very very typical in Mexico. [...] yeah so I was missing a little bit of Africa specifically."                                                                                 | Training not context specific                                                                     |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "we had to go there three times to hand over all the documents and then you wait. And you wait and you wait and you wait."                                                                                                                                          | Long process to obtain a visa                                                                     |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "The visa was the biggest challenge to be honest, it was not clear yet will I get it, will I not get it?"                                                                                                                                                           | Uncertainty regarding approval of visa                                                            | 2.7 Difficulties obtaining a visa                                    |                                                                                  |                                                                                                                                                                                                                                                                                                     |
|                                             |                                                                                                    | "But so it's just a lot of documents that you have to get together."                                                                                                                                                                                                | Gathering all necessary documents                                                                 |                                                                      |                                                                                  |                                                                                                                                                                                                                                                                                                     |

| Phases of the expatriate management process | Sample interview questions*                                                                                                                                                                                      | Raw data – sample quotations*                                                                                                                                                                                                                       | Sample codes*                                                                                                                                               | Categories                                                      | Themes                                                                                                                             | Link to research objectives (RO) / questions (RQ)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                             |  |  |
|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|--|--|
| Expatriate Adjustment                       | Which challenges did you experience while being on your international assignment in South Africa regarding your position, tasks and responsibilities?                                                            | "I had to find out my own way and I had to, as I said, I was the first one in the role. So it was not that there was a job description."                                                                                                            | Not having a job description                                                                                                                                | 3.1 Dealing with and working in the unknown                     | Challenges experienced regarding position, tasks and responsibilities while being on international assignment                      | RO3: To identify and empirically investigate the challenges that expatriate managers experienced during their foreign assignment, especially with regard to adaptation in the following areas:<br>a. adjustment to work;<br>b. adjustment to interacting with host-country nationals; and<br>c. adjustment to the general non-work environment.<br><br>RQ3: What are the challenges that expatriate managers experienced during their foreign assignment, especially about their adaptation in the following areas:<br>a. adjustment to work;<br>b. adjustment to interacting with host-country nationals;<br>c. adjustment to the general non-work environment. |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "I really had no clue of my job."                                                                                                                                                                                                                   | Lack of prior knowledge and experience                                                                                                                      |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "Ja you come with a certain expectation, [...] And then of course it's not reality, your expectation is not really a mural of the reality."                                                                                                         | Discrepancy between expectations and reality                                                                                                                | 3.2 Dealing with unexpected situations                          |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "So you see topics and problems that you did not expect"                                                                                                                                                                                            | Lack of preparation for unexpected problems                                                                                                                 |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "It's very very human-related and you have to show empathy of course to understand what really happened"                                                                                                                                            | Dealing with emotional topics                                                                                                                               |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "We just started to get to know each other, we just started to understand each other and then COVID hit us in South Africa and then everybody disappeared. Working from home. That was definitely not how to say healthy for our get to know."      | COVID-related disrupted relationships                                                                                                                       | 3.3 Distance disrupting relationships                           |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "So almost nine months, we work together but they have not physically seen me - only through teams right? So uh, when there is no acceptance, actually the driving and pushing the team and getting the - what you say - alignments will be tough." | Lack of physical presence affecting team dynamics                                                                                                           |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "but I know possibilities are limited and so I'm afraid nobody at [company name]" knows what to do with me when I'm back"                                                                                                                           | Not being connected to headquarters                                                                                                                         |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "you have to adapt to the local how to say culture of the organisation. This is something you cannot learn in advance"                                                                                                                              | Adapting to different local organisational culture                                                                                                          | 3.4 Working in a different organisational structure and culture |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "Because obviously moving to a new location, it's still the same company, but a lot of processes are based on local processes and were not familiar to me"                                                                                          | Lack of familiarity with local processes                                                                                                                    |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             | Which challenges did you experience while being on your international assignment in South Africa regarding interaction and communication with host-country nationals?                                            | "I had to manoeuvre, I had to balance, I had to be careful that I was not stepping on the toes of the local HR manager in South Africa"                                                                                                             | Need to be sensitive towards colleagues                                                                                                                     | 4.1 Navigating emotional communication in a sensitive culture   | Challenges experienced regarding interaction and communication with host-country nationals while being on international assignment |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "Dutch are known as being quite direct and sometimes, yeah, that can be felt as blunt so that you really have to be aware on how you approach people and how you present yourself in meetings"                                                      | Need to adjust one's own communication style                                                                                                                |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "Um, I got irritated quite a bit of chasing people. [...] sending an e-mail and expecting a feedback by certain date, people don't act on emails. People don't act on emails. You have to, you have to follow up on them."                          | Having to follow up on individuals                                                                                                                          | 4.2 Dealing with cultural peculiarities                         |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "To this general thing of things just being slower. And for me, what was the most extreme thing is just people walking. [...] I cannot be that slow"                                                                                                | Slower way of doing things                                                                                                                                  |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "But this integration process in the country is more difficult than expected."                                                                                                                                                                      | Difficulties to achieve full integration                                                                                                                    | 4.3 Establishing relationships with locals                      |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "So we try to connect with local people, local South Africans, which was not easy I can, I can tell you that. Because yeah, you are a foreigner. You are intruding in there."                                                                       | Budding relationships                                                                                                                                       |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "And difficult I would say it is to understand the background why there is tensions between two people, is not related to the people themselves, it's related to the history, since hundreds or thousands of years"                                 | Understanding the impact of diverse racial backgrounds and histories on relationships                                                                       | 4.4 Cultural diversity                                          |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | "I then had to figure out what to do, how to manage the whole thing, so that you can make the best use of the people, their talents and possibilities for the company"                                                                              | People management of diverse team                                                                                                                           |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  | Which challenges did you experience while being on your international assignment in South Africa regarding general adjustment (e.g. food, living conditions, weather, family support, etc)?                                                         | "So you, yeah, need to have a certain character that you are, yeah, to reach out to take initiative etc."                                                   | Proactivity and self-initiative of partner required             | 5.1 Changes in family set-up (work & life situation) may affect success of international assignment                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Challenges experienced regarding general adjustment while being on international assignment |  |  |
|                                             |                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                     | "So it's nearly impossible to get a work visa. Um, what is not too difficult to get is a study visa. It then of course comes with a cost."                  | Limited opportunities for partner                               |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                     | "But then, once you arrived, and the daily life starts, it is you say yes okay nobody is here, sometimes they say at the weekends I don't talk to anybody." | Adapting to a new life without family                           |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             | "I mean we have electricity issues, which creates sometimes a mess in the morning when it comes to the traffic"                                                                                                  |                                                                                                                                                                                                                                                     | Load-shedding affecting traffic and road safety                                                                                                             | 5.2 The lack of basic needs                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             | "Well, obviously in terms of safety that is a critical aspect for us."                                                                                                                                           |                                                                                                                                                                                                                                                     | General safety in SA                                                                                                                                        |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             | "I never had a car in my life. I've driven in these past 2,5 years I have driven more than my whole life. You don't walk much. I went to work with a bicycle."                                                   |                                                                                                                                                                                                                                                     | Limited mobility options                                                                                                                                    |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             | "So we had to stay in temporary accommodation. So you're then staying in a in a small apartment, me going, yeah, to the office every day. And my wife, yeah, she was really struggling and uh, she felt guilty." |                                                                                                                                                                                                                                                     | Not being able to start immediately with new life                                                                                                           | 5.3 Settling in completely requires time                        |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             | "But initially you know, first the barrier I would say is the acceptance. [...] So the friendship and also the bonding will not be there."                                                                       |                                                                                                                                                                                                                                                     | General acceptance in new environment                                                                                                                       |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                     |                                                                                                                                                             |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |
|                                             |                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                     |                                                                                                                                                             |                                                                 |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                             |  |  |

| Phases of the expatriate management process                                                                                                                                                                            | Sample interview questions*                                               | Raw data – sample quotations*                                                                                                                                                                                                                                                                                                                                                             | Sample codes*                                   | Categories                                             | Themes                                                    | Link to research objectives (RO) / questions (RQ)                                                                                                                                                                                                                                                                               |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|--------------------------------------------------------|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Repatriation                                                                                                                                                                                                           | Which challenges do you expect to experience regarding your repatriation? | "It gets difficult, I just know from other people, once you insist on coming back to Germany. Because or if you insist on going into a fancy country."                                                                                                                                                                                                                                    | Lack of control over future location choice     | 6.1 Having to show a higher degree of flexibility      | Challenges expected to experience during the repatriation | RO4: To identify and empirically investigate the challenges that expatriate managers expected to experience during and after their repatriation to their country of origin.<br><br>RQ4: What are the challenges that expatriate managers expected to experience during and after their repatriation to their country of origin? |
|                                                                                                                                                                                                                        |                                                                           | "And my philosophy always was I don't change unless the next step is the right one for me. So but now being an expatriate in a timeframe the point comes when you have to, so you can't stay longer in that country. Now you have to take what is available. And that can be of course a challenge, that you say I take it because it's vacant, not because it's the right thing for me." | Sacrificing expectations and goals              |                                                        |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                        |                                                                           | "I still don't understand why we have to – flexibility, I would say flexibility, sometimes a bit more flexibility in our process"                                                                                                                                                                                                                                                         | Being stuck in company processes                |                                                        |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                        |                                                                           | "The professionally finding the right position is you know, always tough right. So to match the aspirations of the self and also the aspirations and expectations of the management in India, right."                                                                                                                                                                                     | Find a matching job                             | 6.2 No planning of future career                       |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                        |                                                                           | "Um, so I don't even know whether I will go back to Germany itself. So this is a bit complicated sort of in [company name]*. So there's not a very clear succession plan or kind of plan for that."                                                                                                                                                                                       | No career planning                              |                                                        |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                        |                                                                           | "we neglected that we thought, ohh yeah, we're moving back to the Netherlands and that's the country we know that's where we come from. So that should be an easy move. But it wasn't. It wasn't, yeah."                                                                                                                                                                                  | Readapting to home country                      | 6.3 Struggle to adapt to the home country again        |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                        |                                                                           | "What I will definitely miss is [...] despite challenges, positive attitude to life that they have in South Africa, their weather. [...] Um, and the lifestyle that I have. An apartment of a size and probably location and view [...] The fact that anything that is connected with the service is just not expensive"                                                                  | Missing the benefits of life in SA              |                                                        |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                        |                                                                           | "The social life now we have the pressure from the family again things that needs to be done etc."                                                                                                                                                                                                                                                                                        | Social pressure and less independence           |                                                        |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                        |                                                                           | "No, the repatriation is up to you, there is no support like here."                                                                                                                                                                                                                                                                                                                       | No company support                              | 6.4 Repatriation not seen as important as other stages |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                        |                                                                           | "So this is something where I hope communication could be a bit different."                                                                                                                                                                                                                                                                                                               | Lack of communication about process and options |                                                        |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                        |                                                                           | "I even think that it is much more important more efforts has to be spent on the returning than into the preparation."                                                                                                                                                                                                                                                                    | Lacking focus on repatriation                   |                                                        |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                        |                                                                           | "and nobody is able to give me any ideas."                                                                                                                                                                                                                                                                                                                                                | Uncertainty about possible options              | 6.5 Uncertainty about the future                       |                                                           |                                                                                                                                                                                                                                                                                                                                 |
| "Like I know that I gotta have a job. I know that I'm gonna be paid. I know that I'm gonna be okay, but my girlfriend doesn't know where she would have to apply for. Where are we going to live? What is she going to | Increased uncertainty for partner                                         |                                                                                                                                                                                                                                                                                                                                                                                           |                                                 |                                                        |                                                           |                                                                                                                                                                                                                                                                                                                                 |

\*Note: A complete list of the questions, quotations and codes are provided in Annexure F

Table 4.2: An overview of the themes, categories and codes

Source: Researcher's own construction

#### 4.5.1 THEME ONE: CHALLENGES EXPERIENCED DURING RECRUITMENT AND SELECTION FOR THE CURRENT POSITION

The first theme is ‘Challenges experienced during recruitment and selection for the current position’ and it answers the first research question (RQ1). The different categories that were identified under this theme are discussed next.

##### 4.5.1.1 Category 1.1: Ignoring soft skills during selection

The first category that forms part of the first theme, ‘Challenges experienced during recruitment and selection for the current position’ is ‘Ignoring soft skills during selection’. With regard to this category, Participant 6 shared the following:

[...] I think this is somewhere where companies have to understand that it makes no sense for me to force someone to a delegation or kind of make-it-a-must thing for senior roles or whatever. [...] So I think they must get the feeling that you are interested.

With regard to this excerpt, Participant 6 explained that international assignments were often mandatory for future leaders. Thus, future management candidates often accepted international assignments without really wanting to or having the necessary soft skills to be able to adapt to their new environment, which eventually led to difficulties for all parties involved. The participant had not experienced this challenge himself as he mentioned that he did not struggle to adapt to the new environment, but he was aware of this being a challenge for other potential expatriate managers in his company.

It should be noted that this category was developed based on a specific challenge that was identified by Participant 6 only and that the category did not overlap with any other codes generated from the data. Given the importance of soft skills during stage three of the process (see Chapter Two, sections 2.2.4 and 2.3.1), it was worth mentioning this challenge. Furthermore, this challenge mentioned by Participant 6 corresponds with several studies alluded to in Chapter Two. For example, Tahir (2018) confirmed in his study that technical skills were the predominant criterion in the company’s selection of expatriate managers, whereas language skills, adjustability skills, and personal characteristics did not form part of the participating companies’ selection criteria.

#### 4.5.1.2 Category 1.2: Poor internal communication

The second category of theme one is ‘Poor international communication’ during the recruitment and selection stage. This category constitutes the selected codes as illustrated in Table 4.2. With regard to this category, Participant 3 noted the following:

You have to fill [in] a lot of papers of course with the information that they anyhow already have. That is the first challenge because it is repeating again and again and again.

In view of Participant 3’s comment, he had to complete several repetitive tasks, as the company did not have a tool for sharing the documents among colleagues or departments, which led to the challenge of poor internal communication. Also, in line with this category that reflects poor internal communication as a challenge during the recruitment and selection stage, Participant 6 mentioned that “you don’t know what is happening after the job interview, as the involved HR colleagues did not communicate about the next step and the outcome of the selection process”.

#### 4.5.1.3 Category 1.3: Uncertainty due to company processes and circumstances

The third category under theme one is ‘Uncertainty due to company processes and circumstances’. This category consists of several codes as displayed in Table 4.2. With regard to this challenge, Participant 1 alluded to the fact that he never knew what would happen next or whether something eventually would stop the company from selecting him for the international assignment, even if the decision had already been made, which pointed to the uncertainty. Also, with regard to this category, Participants 3 and 6 both noted that it took some time until the final selection decision had been made and that the waiting time in combination with the uncertainty regarding whether they would be given the assignment was a challenge to them. This finding correlates with Germany’s score in Hofstede’s (1980) dimension of uncertainty avoidance. As explained in Chapter Two (see section 2.2.3), Germany received a high score in this dimension, which means that certainty is important to them and that Germans, for example, prefer to have certainty before they would start with a task. In contrast to Germany, South Africa received a rather low score in this dimension, which means that South Africans can live with the unknown. Consequently, Germany’s high score in this dimension corresponds with this category, as the two

participants (ie, Participant 1, 3 and 6) who were either German or who were used to the German culture struggled with the uncertainty that was prevalent during this stage.

#### 4.5.1.4 Category 1.4: Uncertainty due to external factors

The fourth category of the first theme is ‘Uncertainty due to external factors’ and the selected codes associated with this category are illustrated in Table 4.2. This category is similar to the category explained earlier in this chapter (see section 4.5.1.3), but focuses on the external factors and not on the company’s internal factors. Regarding this category, Participant 1 noted the following: “Maybe there are some family topics. It’s always a kind of uncertainty.”

In the context of this statement, Participant 1 explained that when he relocated to South Africa with his wife and children, he had experienced uncertainty as he did not know if any family-related issues, such as unforeseen difficulties with schools, jobs or an unwillingness to relocate by his family members, would change or even stop the assignment from happening. Participant 7 also experienced the challenge of uncertainty but, in his case, it was due to the COVID-19 pandemic. His recruitment and selection process started in 2020, which was the year of the outbreak of the pandemic. As a result, the recruitment and selection process was delayed and took longer than expected, which increased the uncertainty and waiting time for him. As alluded to earlier (see section 4.5.1.3), Germany’s high score in Hofstede’s (1980) dimension of uncertainty avoidance corresponds with and might be the reason for this challenge being experienced by Participants 1 and 7. While Participant 1 is originally from Germany, Participant 7 has been working for the German MNC for several years and has become accustomed to the German work environment and culture.

In conclusion, when comparing the findings of theme one to the challenges that were identified in the literature review, two challenges mentioned in previous research could not be confirmed in the current study. First, Collings (2014) explains that the recruitment and selection process is often informal, rushed and does not follow a specific procedure. This challenge was not mentioned by any of the respondents in the current study, and as already explained in the preceding section, the duration of the recruitment and selection process was in fact experienced as a challenge as it was

taking too long. Secondly, Stahl (2017) points out the absence of a long-term orientation during this process, given that career planning for expatriate managers is often inadequate. This challenge was also not mentioned by any of the respondents as part of this stage of the expatriate management process. However, this challenge was confirmed in a later stage, which is explained later in this study (see section 4.5.6.2).

#### 4.5.2 THEME TWO: CHALLENGES EXPERIENCED DURING THE PREPARATION FOR THE INTERNATIONAL ASSIGNMENT

The second theme refers to the challenges that the expatriate managers experienced during the preparation stage for their international assignment and presents the answer to RQ2. This theme consists of seven categories, which are discussed in the following sections.

##### 4.5.2.1 Category 2.1: COVID-related uncertainties

The first category of theme two is ‘COVID-related uncertainties’. This category consists of several codes as displayed in Table 4.2. Four of the seven participants prepared for their international assignment during the COVID period, and three of them mentioned COVID as a challenge. Participant 2, for example, explained that his relocation to South Africa had been difficult due to the outbreak of COVID and the complications with the logistics. For Participant 6, COVID was the biggest challenge during his preparation. He elaborated:

We selected the place to live in. I got my visa shortly after and basically at the time I got my visa, and we knew which apartment we want to have, everything was cancelled because of COVID. We couldn’t move. And this created a whole bunch of problems.

In view of Participant’s 6 comment, his move to South Africa was cancelled for an indefinite period of time. Consequently, he had to find solutions and had to manage with the uncertainties of not knowing when and if the relocation to South Africa would materialise. Participant 7 got selected for his assignment in South Africa in 2020, but because of the COVID-related travel restrictions he was not able to proceed with the planned look-and-see visit to South Africa. As a result, he also had to live with the uncertainties as he had never visited the African continent before and was therefore, along with his family, relocating to the complete unknown. Although

the reviewed theory did not specifically mention the COVID-19 pandemic, it was to be expected that it would have an impact on this stage as the pandemic had far-reaching implications for several industries.

#### 4.5.2.2 Category 2.2: Unfamiliar living and working conditions

The second category under theme two is ‘Unfamiliar living and working conditions’ and consists of several codes, as displayed in Table 4.2. Regarding this category, Participant 1, who moved to South Africa in November 2019 – just before the onset of COVID-19 – explained that the competitive housing market in Gauteng had been a challenge to him and his family. He mentioned that there had been few houses on the market that fulfilled all of the company’s safety requirements, so it had taken a while until they could find a suitable home for the family. Also, in line with this category reflecting the challenge of unfamiliar living and working conditions, Participant 4 said that she had expected to receive the same benefits in her new position as she had in Germany; however, to her surprise she did not receive a company car in South Africa. As she expected a car, she experienced the challenge of neither being mobile any longer nor being able to simply buy her own car in South Africa, which in turn affected her living conditions.

This challenge is a valuable contribution to the existing body of knowledge, as it has not been identified as a challenge in the literature review.

#### 4.5.2.3 Category 2.3: Poor internal communication on process of expatriate management

Category 2.3 is ‘Poor international communication on process of expatriate management’ and constitutes the selected codes that are illustrated in Table 4.2. With regard to poor internal communication that was identified during the preparation stage, Participant 2, who was on his second international assignment, shared the following: “If you’re doing it for the first time and you’re not fully aware of the processes, I think it is quite a challenge”.

Participant 2 explained that the expatriate management process was a challenge if the expatriate manager was on his or her first assignment. However, as his first international assignment was not in South Africa, this challenge could not be linked directly

to his experiences with his assignment to South Africa but can be seen as a general challenge. Also, in line with this category of poor internal communication on the process, Participant 2 stated that the document explaining the process and policies was exceptionally long and if one did not spend much time on the document– which he said was not the core responsibility of the expatriate manager – it could be a challenge. The expatriate managers were overloaded with information and the focus on the more important aspects was lacking. With respect to poor internal communication, Participant 4 reported:

And then I realised it is very difficult for me as a single person with no, let's say credit history [with] South African banks to get a loan for a car.

This statement correlates with category 2.2, where Participant 4 experienced a challenge with not receiving the same benefits in South Africa as in Germany. In addition to not receiving the same company benefits, Participant 4 alluded to the fact that it had been an “unexpected surprise” to her, as this change in arrangements had not been communicated by the company. Furthermore, it was not possible for her to simply buy a car in South Africa, as she could not provide the seller with a South African credit history and eventually had to find a solution herself to buy a car in South Africa, which took some time and effort.

Identifying the challenge of poor internal communication on the expatriate management process is a valuable contribution to the existing body of knowledge, as it has not been identified as a challenge in the literature review.

#### 4.5.2.4 Category 2.4: Unclear situation for partner

The category ‘Unclear situation for partner’ consists of several codes that are displayed in Table 4.2 and have all been mentioned by Participant 2, whose partner experienced many challenges to be able to come to South Africa. Firstly, Participant 2 shared that more support for the expatriate manager’s partners with regard to dual careers would be helpful, as the partners usually had to make sacrifices when joining the expatriate manager on the international assignment. Secondly, he expressed that the situation for his partner had not been made transparent during the preparation process:

So, basically the company takes very good care of the person who is being transferred for the international assignment but [the company] completely neglects the partner. If they want to work, they are basically on their own. And even things like getting a work visa, getting guidance on what jobs are available, understanding the market situation in the new country, are completely neglected.

In view of Participant 3's comments, this expatriate manager's partner was often neglected in the preparation process. This neglect, in combination with the lack of support to the partner, resulted in the challenge of an unclear situation experienced by the partner. This challenge was also mentioned in the literature review in Chapter Two. Tahir and Egleston (2019) highlight the challenge of family members being left with no support to find work or schools in the host country, which was confirmed in the current study with the statements made by Participant 2.

#### 4.5.2.5 Category 2.5: Dealing with administrative processes by showing self-initiative

The fifth category of theme two is the challenge of 'Dealing with administrative processes by showing self-initiative'. Codes that are associated with this category are displayed in Table 4.2. Both Participant 2 and Participant 5 mentioned several times that they had to organise quite a few things themselves. Participant 2, for example, faced the challenge of working with an inefficient third-party service provider who was supposed to deal with organisational tasks such as booking flights to South Africa, a shuttle service, and temporary accommodation. However, Participant 2 said that he had to book his flights himself and that he also had to find accommodation. Upon his arrival with his family at the Oliver Tambo airport, expecting a shuttle, there was no shuttle arranged. The third-party service provider did not book the shuttle, and, as a result, Participant 2 had to take care of the process himself by showing self-initiative. In line with the challenge identified in this category, Participant 5 also confirmed this experience by stating that "[t]here was not so much preparation in that sense".

In view of this comment by Participant 5, the challenge of being one of the first expatriate managers from his company to relocate to South Africa became obvious. As mentioned earlier, not much preparation was in place for Participant 5 either, as the South African subsidiary did not have experience with the whole process of expatri-

ate management. Consequently, Participant 5 took the initiative and applied for a visa himself. He further explained that he had arranged a cultural training session himself by contacting a few institutions in his home country. As his work in South Africa was his second international assignment, he already had prior experience and thus knew what was needed to be prepared for his international assignment in South Africa.

This identified challenge is a valuable contribution to the existing body of knowledge, as it has not been identified as a challenge in the literature review.

#### 4.5.2.6 Category 2.6: Training not adequately preparing for assignment

The sixth category of theme two is ‘Training not adequately preparing for assignment’ and comprises several codes relating to the training as part of the international assignment. The relevant codes are displayed in Table 4.2. Of the seven participants, five attended cross-cultural training during the preparation for their international assignment. Participant 7 did not receive an invitation to attend cross-cultural training, while Participant 2 received an invitation, but only after he and his family had lived in South Africa for six months. However, he shared that the training “was offered virtually and we thought it doesn’t help us so we decided not to take it”.

Participant 2 commented that the cross-cultural training had neither been offered on the appropriate platform nor had it been timeous for him to be helpful, which resulted in him not accepting the offer. In addition, he mentioned that cross-cultural training would have been useful, but only if it had been offered before he came to South Africa. Participant 2 attended a cross-cultural training programme but, in his case, the training took place with other expatriate managers, who were assigned to different countries. In line with this category, he stated the following:

So, as the majority was from Mexico, everything was concentrated on topics which are very, very typical in Mexico. Some of them [the topics], yes, it’s the same over here, but [ ...] I was missing a little bit of Africa specifically.

Participant 3 noted that he did not receive the information he needed and was thus not adequately prepared for the cultural differences that were discussed earlier (see Chapter Two, section 2.2.3). Participant 4 explained a similar challenge as she said

her training had been very basic and not detailed enough to understand the dynamics of the South African culture. The same challenge was identified in the study by Tahir (2018), who found that the training offered to the respondents in his study was neither tailored to the expatriate manager's specific needs nor to the culture of the UAE. According to Tahir (2018), this resulted in the expatriate managers mentioning that the training did not facilitate their ability to adjust to the new culture and that they were not prepared well for their international assignment, which in turn led to unrealistic expectations. Dousin and Sulong (2021) also state that standardised training is not considered to be efficient, as the training must be tailored to the cultures involved and the particular MNC. They further identified the lack of intercultural training as a challenge, which was also identified in the current study with the code 'No cultural training'.

#### 4.5.2.7 Category 2.7: Difficulties obtaining a visa

The last category of theme two is 'Difficulties obtaining a visa' and constitutes the selected codes as illustrated in Table 4.2. It was notable that all participants except for Participant 4 mentioned the visa as a challenge during the preparation stage. Participant 1, who was a German citizen married to a non-German wife, expressed that one should not underestimate the visa process and that it had been a challenge to him and his family to obtain the visa as he and his wife had different nationalities. Also, in line with this category, Participant 1 noted:

It would be helpful [if] [company name] or whoever is in charge for your move would give you clear guidance on what kind of documents are needed, original or a copy – that would help a lot and would speed up the process.

Participant 3 explained that he did not receive any guidance from his company and – with the help from his South African colleagues – took care of the visa application process himself. Consequently, it was also Participant 3 who earlier alluded to the challenge of obtaining a visa. With regard to this category, four participants (Participants 1, 3, 6 and 7) pointed out that it was a long process to obtain a visa. Participant 1, for example, had to visit the embassy several times until he was able to submit a complete application – and then he still had to wait: “We had to go there three times to hand over all the documents and then you wait. And you wait and you wait and you wait.”

Participant 3 explained that he was supposed to start his assignment in 2021, but only obtained his visa the next year, in May 2022. He eventually relocated to South Africa in June 2022. Participant 7 also mentioned that he had waited nine months for his visa, whereas Participant 6 commented that the visa process took particularly long. With respect to the difficulties in obtaining a visa, Participant 1 shared that he did not know if the documents he had submitted to the embassy were complete or if anything was missing, as he had not received any feedback. The lack of feedback was another issue that was raised by Participant 3:

The visa was the biggest challenge, to be honest. It was not clear [...] will I get it, will I not get it? When will I get it? Where is it at the moment? Where is the bottleneck?

In view of Participant's 3 comments, it was clear that he experienced much uncertainty during the visa application process, as he did not receive any communication or updates and had to deal with the uncertainty of not knowing whether his visa would be approved or not. Participant 5 further referred to this challenge by stating that the visa requirements were from the host country's perspective and disregarded the situation in the home countries. He explained that it was, for example, a visa requirement to submit stamped bank statements of the previous three months, which was not difficult to obtain in South Africa. However, in his home country, it was rather difficult to obtain stamped bank statements, which was a challenge to him. Participant 6 also struggled with these documents, as he raised the point that he had to obtain and put together several documents to be able to apply for a visa. Also, in line with this category that reflects difficulties in obtaining a visa, Participant 6 stated that his experience with the company supporting him with his visa application had not been satisfactory, as they requested too many documents than were needed for the application. When submitting the application to the embassy, he was required to remove all the documents that were not necessary.

These challenges have not been identified in the literature review and therefore make a valuable contribution to the body of knowledge on the expatriate management process.

In the literature review, the main challenge that was identified was the lack of or the

too standardised cross-cultural training, which has been confirmed in the current study. In addition, the literature review revealed the challenge of ‘no language training’ (see Chapter Two, section 2.3.2). In this study, none of the participants mentioned a lack of language training, whereas other participants indicated that language was not a challenge to them during their current assignment. This comment can be explained by English being the generally used business language in South Africa, which should not be a challenge to employees of MNCs.

Further, several other preparation-related challenges were mentioned by the participants that have not been identified in the literature review, which confirms the research gap that was outlined in Chapter One (see section 1.3).

In the following sections, three themes are explained that all link to the third stage of the expatriate management process, namely expatriate adjustment (see Chapter Two, section 2.2.4).

#### 4.5.3 THEME THREE: CHALLENGES EXPERIENCED REGARDING POSITION, TASKS AND RESPONSIBILITIES WHILE BEING ON INTERNATIONAL ASSIGNMENT

Theme three is related to the challenges that the expatriate managers experienced regarding their position, tasks and responsibilities during their international assignment. This theme presents the answer to RQ3a and was divided into the following four categories:

##### 4.5.3.1 Category 3.1: Dealing with and working in the unknown

Table 4.2 includes selected codes that were combined to establish this category that relates to dealing with and working in the unknown. In this respect, Participant 5 stated the following:

I had to find out my own way and I had to. As I said, I was the first one in the role. So it was not that there was a job description.

This experience by Participant 5 shows that even after he arrived in South Africa and started with his international assignment, he did not have a job description and had to

find his own way. Regarding this category, Participant 6 shared that the work-related field had been completely new to him, as he had not worked in that part of the business before and neither knew the products nor what exactly that part of the business was doing or how to lead people. Participant 7 explained that he had to establish a new department from the very start, which was a challenge to him, especially as it took some time until the new department was recognised by the company. The challenge of dealing with and working in the unknown can be argued against the background of the differences between the South African and the German culture, according to Hofstede's (1980) dimension of uncertainty avoidance (see Chapter Two, section 2.2.3). This difference in culture was also noted in the aforementioned codes and challenges, given that the South African colleagues did not provide clear instructions and certainty to their uncertainty-avoiding German counterpart by, for example, not providing a job description.

#### 4.5.3.2 Category 3.2: Dealing with unexpected situations

Category 3.2 is titled 'Dealing with unexpected situations' and consists of several codes as displayed in Table 4.2. With regard to this challenge, Participant 1 referred to the eruption of riots in KwaZulu-Natal in South Africa in July 2021, which was a critical, intricate and unexpected situation. Also, in line with this category that reflects the challenge of dealing with unexpected situations, Participants 3 and 7 noted that they had encountered discrepancies between their expectations and the reality. Participant 3, for example, shared that he had a specific expectation about the maturity level of the South African subsidiary, but that his expectation turned out not to be the reality. Participant 3 further explained that he was unprepared for these unexpected situations.

Participant 3 concluded that his tasks were rather human-related and that he had to show much empathy to be able to understand what had happened in specific situations, which was an unexpected situation and thus a challenge to him. Participant 7 stated that he was still unsure whether his expectations were too high and if he could expect more of his colleagues – experiences which both point to the challenge of dealing with unexpected situations.

This challenge is a valuable contribution to the existing body of knowledge, as it has

not been identified as a challenge in the literature review.

#### 4.5.3.3 Category 3.3: Distance disrupting relationships

The third category that is part of theme three, ‘Distance disrupting relationships’, refers to the physical distance that caused relationships to derail. This challenge was mentioned by several participants but for different reasons. The selected codes associated with this category are illustrated in Table 4.2. With respect to the distance, which disrupted the relationships, Participant 1 mentioned the following:

We just started to get to know each other; we just started to understand each other and then COVID hit us in South Africa and then everybody disappeared. Working from home. That was definitely not how-to-say healthy for our get-to-know.

Consequently, and due to the COVID restrictions being in place in South Africa, Participant 1 was not able to establish a proper relationship with all of his colleagues as he was not able to see them in person anymore, which negatively affected their ‘get-to-know’ experiences of one another. Participant 3 was confronted with a similar challenge, as he took over some of his new responsibilities before relocating to South Africa. Thus, he started working virtually and did not know his colleagues personally, which in turn led to difficulties in doing his work effectively, as the physical distance disrupted the establishment of sound relationships with his colleagues. Like Participant 3, Participant 7 also started with his international assignment in his home country while he was waiting for his visa:

So [the period of working remotely was] almost nine months. We work together but they have not physically seen me - only through Teams, right? So [...] when there is no acceptance, actually the driving and pushing the team and getting the [...] alignments will be tough.

Because he was working remotely, he experienced the challenge of not being accepted by his colleagues and was thus not being able to make progress with his team. This shows that the physical distance disrupted the relationships between him and his co-workers. In contrast to the physical distance between the expatriate managers and their South African colleagues, the last challenge was identified as the relationship between the expatriate manager and the headquarters. Participant 4 stated that she did

not feel connected to the headquarters. This was a challenge to her, as she was afraid that no one in the headquarters knew how they would deal with her situation after the completion of her international assignment, which could negatively affect her repatriation. Participant 4 further alluded to the many changes in the management at the headquarters, which resulted in her not knowing any of the managers at the headquarters, and also hardly anyone at the headquarters knowing her, which points to the disrupted relationships that were caused by the physical distance between the headquarters and its foreign subsidiary. The challenge of disrupted relationships was also identified in the literature review. Stahl (2017), for example, describes that the different locations of the headquarters and those of the expatriate managers can lead to challenges such as disrupted relationships, which in turn can result in repatriation difficulties. This same combination of disrupted relationships and the negative effects on the expatriate manager's repatriation was made by Participant 4, as explained above.

#### 4.5.3.4 Category 3.4: Working in a different organisational structure and culture

The final category constituting theme three is 'Working in a different organisational structure and culture'. Selected codes associated with this theme are depicted in Table 4.2. Participant 1 reported the following:

You have to adapt to the local how-to-say culture of the organisation. This is something you cannot learn in advance; this is not something you can read about, so you just have to understand how the situation is set up and how the organisation works.

In summary, he explained the challenge of adapting to the different organisational culture in the host-country, which one could not learn in advance or prepare oneself for; one had to experience and learn from it. A similar challenge was mentioned by Participant 2, who stated that although he still worked for the same company, many processes were locally oriented, different from what he knew from the headquarters, and thus not familiar to him. With respect to working in a different organisational structure and culture, Participant 5 explained that the matrix structure of the South African subsidiary was a challenge to him. He raised the issue that he not only had the regional responsibility, but also had to take care of the different divisions that in contrast to the regional responsibility do not focus on a specific region but on the subsidiary's business segments. In these divisions the employees sometimes had dif-

ferent opinions on factors and processes than he had been used to in the regional organisation. Also, with regard to this category, Participant 6 explained that although he is Swiss, he had always worked in the German headquarters before he started working in South Africa. He mentioned that most of his colleagues in the headquarters had enjoyed a high level of education, which enabled them to grasp complex concepts. Conversely, as the South African subsidiary of the MNC where he was working comprised many field workers and a high level of education was not needed to do the work successfully, Participant 6 experienced the challenge of adapting to the different educational levels in South Africa and being able to explain complex concepts easily. The challenges that the respondents experienced by working in a different organisational structure and culture can be linked back to the cultural differences mentioned in the cultural dimensions concept by Hofstede (1980).

Firstly, South Africa and Germany differ significantly in the dimension of power distance (see Chapter Two, section 2.2.3.1). South Africa has a high level of power distance, which means that hierarchies and orders from superiors are widely accepted, whereas in Germany hierarchies are usually dismantled to achieve decentralised organisations where everyone can contribute. As most of the participants in the current study were German or worked in the German headquarters before they came to South Africa, they were used to the low level of power distance prevalent in Germany. When they started with their international assignment in South Africa, they had to get used to the higher level of power distance that was prevalent in South Africa, which might have been a challenge to them. Secondly, South Africa and Germany also differ regarding their long-term orientation (see Chapter Two, section 2.2.3.1). South Africans are typically focused on the present and quick results, whereas Germans are focused on long-term results. Similar to the difference in power distance, the expatriate managers had to get used to the different focus in South Africa and presumably also had to adapt their style to meet their colleagues' expectations. As explained earlier, the expatriate manager's success or failure in managing these cultural differences influenced the challenges they faced during their international assignment (see Chapter Two, section 2.3.3).

#### 4.5.4 THEME FOUR: CHALLENGES EXPERIENCED REGARDING INTERACTION AND COMMUNICATION WITH HOST-COUNTRY NATIONALS WHILE BEING ON INTERNATIONAL ASSIGNMENT

Theme four, which answers RQ3b, refers to the challenges that expatriate managers experienced with their interaction and communication with host-country nationals during their international assignment. This theme was aggregated from the four categories ‘Navigating emotional communication in a sensitive culture’, ‘Dealing with cultural peculiarities’, ‘Establishing relationships with locals’ and ‘Cultural diversity’.

#### 4.5.4.1 Category 4.1: Navigating emotional communication in a sensitive culture

The first category ‘Navigating emotional communication in a sensitive culture’ comprises several codes as highlighted in Table 4.2. In respect of this category, Participant 5 noted: “I had to manoeuvre; I had to balance; I had to be careful that I was not stepping on the toes of the local HR manager in South Africa.”

This category denotes the challenge of needing to navigate emotional communication in a sensitive culture by being sensitive towards co-workers to not hurt any feelings. Also, in line with this challenge is Participant’s 6 narration of always being careful about which topics could be discussed and with which colleagues or friends, as there were some sensitive topics, he had learned, that should not be raised. Participant 6 further explained that he was used to asking the questions that came into his mind and that he had difficulty in withholding these questions and that he should even be more careful in this regard. Participant 6 further alluded to “locals being very emotional”, and that there were often feelings involved that they as expatriate managers should not neglect. With respect to this challenge, Participant 5 stated:

[The] Dutch [people] are known as being quite direct and sometimes; yes, that can be felt as blunt so that you really have to be aware on how you approach people and how you present yourself in meetings.

As Participant’s 5 home-country is the Netherlands, he refers to the Dutch and not the German people. Participant’s 6 statement shows the challenges of adjusting one’s communication style to adapt to the local style and to not act in a way that can be perceived as insensitive. The challenges presented as part of this category can be linked to Hall’s (1976) context theory. Germans have been identified as having a low-context culture, which means that they follow a direct communication style, rely on spoken words and do not hesitate to express their ideas and thoughts. In contrast, South Africans have a high-context culture, which means that they use a more indi-

rect and face-saving communication style that is used to improve relationships. Several of the participants in this study mentioned challenges such as adjusting one's communication style or being more sensitive and less direct towards colleagues. These challenges, which all form part of the category 'Navigating emotional communication in a sensitive culture', can be caused by the differences between low- and high-context cultures.

#### 4.5.4.2 Category 4.2: Dealing with cultural peculiarities

Category 4.2 'Dealing with cultural peculiarities' consists of selected codes as indicated in Table 4.2. Regarding this category, Participant 5 reported that soon after starting his new assignment in South Africa he became frustrated by having to continuously remind and follow-up on his colleagues to "getting things done". Initially, he thought that his South African colleagues were lazy given that he had sent several emails but had not received any feedback from his colleagues. After a while, he realised that if he developed a relationship with his colleagues, this stumbling block could be resolved. This notion also correlates with Hall's (1976) context theory (see Chapter Two, section 2.2.3.2), namely that South Africans have been identified as having a high-context culture that focuses on relationships. With regard to this challenge, Participant 6 mentioned that he had difficulty with the general slow pace that was prevalent, not only at work, but also in other ways: "even if it was just walking slower".

As explained in Chapter Two (see section 2.3.3), Tahir (2018) indicates that a lack of cross-cultural training results in adaptation challenges to expatriate managers, as cultural differences are an obstacle. Haile and White (2019) confirm this finding by saying that expatriate managers who did not receive appropriate cross-cultural and language training struggled to adapt to their new environment. In this respect, both Participant 5 and Participant 6 in the current study received cultural training; however, the training might not have been comprehensive enough given that the participants still faced several challenges emanating from cultural differences.

#### 4.5.4.3 Category 4.3: Establishing relationships with locals

Category 4.3 'Establishing relationships with locals' comprises the identified codes as illustrated in Table 4.2. As far as this category is concerned, Participant 4 men-

tioned that the “integration process in the country [South Africa] is more difficult than expected”.

This experience by Participant 4 denotes the challenge of becoming fully integrated and establishing relationships with South Africans. Also, in line with this category, Participant 5 explained that he and his wife’s efforts to build relationships with local South Africans was a challenge to them. He stated:

So we try to connect with local people, local South Africans, which was not easy, I can tell you that. Because yes, you are a foreigner. You are intruding in there.

As foreigners they felt as if they were intruding in South Africa and sensed that the locals in general did not want to bond with expatriates. Participant 7 expressed a similar challenge by stating that as an expatriate manager he had to put in more effort to be able to make friends in South Africa. The challenge raised by these participants to establish relationships with South Africans could be due to the limited period expatriate managers stayed in South Africa on the one hand, but, on the other hand, it could also be due to the cultural differences, as explained by Hofstede’s (1980) cultural dimensions and Hall’s (1976) context theory. As cultural differences between South Africa and Germany were pointed out in these two theories and the respondents of the current study could have been unaware of these differences – because of, for example, no or rudimentary cross-cultural training – they might have experienced the challenge of building relationships with locals.

#### 4.5.4.4 Category 4.4: Cultural diversity

The last category that forms part of theme four is ‘Cultural diversity’ and comprises codes as illustrated in Table 4.2. With regard to this category, Participant 3 explained:

And difficult I would say it is to understand the background; why there is tensions between two people, is not related to the people themselves, it’s related to the history, since hundreds or thousands of years.

As presented in Chapter One (see section 1.3), South Africa has a rich cultural diversity with cultural roots dating back a few thousand years. As an expatriate manager

growing up in Germany or in Europe, the consequences of such cultural diversity could be difficult to understand, as expressed by Participant 3. Participant 3 further alluded to the difficulties of managing a diverse team. He first had to understand how to make the best use of the people, their talents and their possibilities to be able to manage the diverse team successfully and to turn cultural diversity into an advantage. Participant 5 mentioned a similar challenge, and mentioned that managing human resources in South Africa was “[...] different than being responsible for human resources in the Netherlands or the US and especially because of the cultural differences”.

In view of Participant 5’s comment, it can be deduced that it is a challenge to manage in a foreign culture, as the cultural diversity required Participant 5 to manage his team in a different way than he was used to in his previous roles in the Netherlands and the US.

This challenge is a valuable contribution to the existing body of knowledge, as it has not been identified as a challenge in the literature review.

#### 4.5.5 THEME FIVE: CHALLENGES EXPERIENCED REGARDING GENERAL ADJUSTMENT WHILE BEING ON INTERNATIONAL ASSIGNMENT

Theme five, labelled as ‘Challenges experienced regarding general adjustment while being on international assignment’, answers RQ3c and pertains to the general adaptation to the non-work environment. This theme was aggregated from three categories that are discussed in detail in the following sections.

##### 4.5.5.1 Category 5.1: Changes in family set-up may affect success of international assignment

This first category of theme five constitutes selected codes as displayed in Table 4.2. With regard to this challenge, Participant 5 shared the following two statements:

When you have a partner that is not [...] being proactive; not willing to reach out [...], it’s going to be very difficult because you [the partner] don’t have a work permit.

So you [...] need to have a certain character that [can] reach out to take initiative et-

cetera, otherwise there's a big risk that the assignment is also not working.

With these two excerpts, Participant 5 explained two important points. Firstly, the circumstances for the expatriate manager's partners might be difficult in South Africa, as it is difficult or almost impossible to obtain a work visa. Consequently, Participant 5 stated that the partner needed to have a certain degree of proactivity and self-initiative to be able to adjust to the new situation and make the most of the new life in South Africa. He added that there was even a risk of assignment failure if the partner did not have certain characteristics that could make it easier for the partner to adapt to the new country. This challenge was also identified in the literature review presented in Chapter Two. Sterle *et al.* (2018) found that the expatriate manager's partner often has to sacrifice their work in the home country, which can have a negative influence on their career. The authors further explain that if the partner is not able to find a suitable job in the host country, the risk of unsuccessful adjustment increases, which in turn affects the expatriate manager's adjustment and further increases the risk of expatriate failure. This challenge was confirmed in the present study with Participant 5's statements above and is further authenticated by experiences mentioned by several other participants, which underlines the prevalence and importance of this challenge. Participant 2, for example, shared that his partner's visa had taken almost a year before it was approved, which limited her opportunities in South Africa. She was thus neither able to work nor to stay longer than three months in the country that was supposed to be her new home. Participant 5 described his partner's experience as follows: "And my wife, yes, she was really struggling and she felt guilty [...] not doing anything and reading etcetera."

Participant 6 also mentioned that it was almost impossible to obtain a work visa for South Africa and other options then came at a cost, for example, applying for a visa to study. However, Participant 6's partner still struggled to find a job in South Africa, which was, according to Participant 6, a challenge to his partner. With respect to the challenge of changes in the family's circumstances, Participant 7 explained the following:

So here the first thing is [...] the visa. You know it takes ages to get the visa for anything, right? So, she's on a dependent pass and she can't work with that. And also you know what does happen is [that] she will lose her independence [...] because of some

critical areas where she always [...] with friends, they say: you be careful [...] don't go alone, whether you are driving the car or you're not driving the car. So, [there are] a lot of security concerns [...] So, [her thinking] is always constrained.

Participant 7 raised the same issue as Participant 6, namely that it is not possible for expatriate manager's partners to obtain a work visa for South Africa and other options then came at a cost. In the case of Participant 7 it was that his wife came to South Africa on a dependent pass, which did not allow her to work. In addition to these circumstances, the issue of security concerns was also raised. Participant 7 mentioned that his wife had lost her independence and always felt constrained. Consequently, it became apparent that changes in the family circumstances were closely related to an international assignment in South Africa and affected the expatriate manager's partner. A need was expressed by these participants for the partner to make sacrifices and to be able to adapt to the new situation. If the adaptation is not successful, the risk of overall expatriate failure increases.

In addition to Participant 2's comments, Participant 3 also noted the challenges with regard to their family's circumstances. For example, he stated that his family did not join him on his move to South Africa owing to two reasons. Firstly, his daughter was in her final year of school and he and his wife did not want to make her change school in her last year. Secondly, his wife would not have been able to obtain a work visa for South Africa to continue working in the same or similar position than she had in Germany. Owing to this change in their family set-up, Participant 3 had to adjust to the different situation of living without his family in the host country, which was a challenge to him.

The aforementioned challenges have not been identified in the literature review presented in Chapter Two and therefore make a valuable contribution to the body of knowledge on the expatriate management process.

#### 4.5.5.2 Category 5.2: The lack of basic needs

The second category of theme five is 'The lack of basic needs', which the participants experienced in South Africa. As illustrated in Table 4.2, several codes were combined to create this category. In view of this category, load-shedding was mentioned by almost all of the participants, which confirms the prevalence of this chal-

lenge. Most of the participants explained that they were fortunate to have a generator or inverter at their homes, resulting in load-shedding not affecting them at home. However, they added that load-shedding affected the traffic as the traffic lights were out of order during load-shedding, which posed a safety concern and required additional planning to arrive at their destination on time.

In addition to the lack of these basic needs, the general safety situation in South Africa was pointed out by several participants. They said that they had adjusted to the different safety levels in South Africa straight away, but Participants 2 and 4, in particular, mentioned that the safety situation was and remained a challenge to them. Other participants raised the issue of limited mobility options owing to the safety situation in South Africa. Participant 6 expressed that he was used to always cycle to work and that he had never owned a car in his life before. In South Africa, however, he was dependent on his car. Participant 2 described this lack of basic needs by saying that they were used to “being able to move around without any concerns. That’s changed now; we have to be very cautious about where we go”.

Participant 2’s aforementioned comment refers to the fact that one could not simply visit any place in South Africa, as some places were not safe. This was confirmed by Participant 5 who explained that he always had to make sure with the security officer at his company if the place he was planning to visit during a weekend was safe or not, which also points to a lack of basic needs. Also, with regard to this category, Participant 5 shared that “you are usually a bit naive in the beginning and think that you can do things you should not do”. He elaborated that it was a challenge to him to find a balance between not being afraid and being aware of the environment. Although this challenge was not reported in the literature review, it is not surprising that the participants mentioned the lack of basic needs as a challenge, especially given the high crime rate in South Africa.

#### 4.5.5.3 Category 5.3: Settling in completely requires time

The last category of theme five is ‘Settling in completely requires time’ and consists of selected codes as illustrated in Table 4.2. With regard to this challenge, Participant 5 alluded to living in temporary accommodation after relocating to South Africa, working at the office every day, while his wife stayed in the small apartment. As it

was not their permanent residence, she could not settle, which was a challenge to her. Participant 7 also raised the challenge of not being accepted in the new environment by sharing the following:

But initially you know, first the barrier, I would say, is the acceptance. Personally, as a family, what we feel [...] [is that unless we] commit for a longer duration of stay, right. So, when the people perceive you as an expat, right, some or the other day you will go back, right? So, the friendship and also the bonding will not be there. [...] This was also experienced by my daughter at school [...]

Participant 7 already stated the challenge of not being accepted by host-country nationals in theme three, but the above comment makes it clear that he and his family also experienced this challenge in the non-work environment. He pointed out that being an expatriate manager implies staying in the host country for a limited period. Thus, many of the local residents did not want to bond with them, as the residents knew that the expatriate manager and his family would leave the country again at a certain point in time, which made it even more difficult for the family to settle in completely.

In summary, many of the challenges that were identified in the literature review regarding theme five have been confirmed in this study. In addition, several other challenges were identified, some of which are specific to South Africa. However, the literature review revealed one more challenge that none of the participants in this study had mentioned. The study conducted by Tahir (2018) found that a majority of the interviewed expatriate managers either received no orientation or a very short orientation upon their arrival in the host country, which led to their being dependent on the favours of their new colleagues on the one hand, and, on the other hand, led to a culture shock. A culture shock was also identified as a challenge in the study conducted by Dousin and Sulong (2021). The fact that none of the participants of the current study mentioned this challenge shows that they either came to South Africa well-prepared or that they had previous international experience and were already accustomed to living in another country.

#### 4.5.6 THEME SIX: CHALLENGES EXPECTED TO EXPERIENCE DURING THE REPATRIATION

Theme six ‘Challenges expected to experience during the repatriation’ consists of five categories that are analysed in more detail in the following sections. Theme six also presents the answer to RQ4.

##### 4.5.6.1 Category 6.1: Having to show a higher degree of flexibility

The first category of theme six is ‘Having to show a higher degree of flexibility’. As shown in Table 4.2, several codes were combined to establish this category. Pertaining to this category, Participant 3 explained that repatriation became difficult once he insisted on returning to Germany or going to a specific country. He explained that people in Germany stayed longer in their work positions than in many other countries, which led to fewer job openings and thus limited options for returning expatriate managers. Therefore, expatriate managers have limited control over their future location and must show a certain degree of flexibility pertaining to the work location or the work position. In addition, Participant 3 elaborated:

And my philosophy always was, I don’t change unless the next step is the right one for me. [B]ut now being an expatriate in a timeframe the point comes when you have to, so you can’t stay longer in that country. Now you have to take what is available. And that can be of course a challenge, that you say I take it because it’s vacant, not because it’s the right thing for me.

In summary, it had always been a priority for Participant 3 to not accept another work position unless it was a suitable option to him. However, being on an international assignment, he had to make sacrifices with regard to repatriation, as he had to leave the host country upon the expiry of his visa. Thus, he would need to start his new job at a specific point in time and had to accept a position that was available at that time without being able to wait for a more suitable opening. This predicament shows the need for flexibility, which was identified as a challenge. Also, in line with this category. Participant 1 pointed out that he felt trapped in company processes. As these company processes were not flexible, he had to show a certain degree of flexibility. At the time of the interview, Participant 1 was spending his final weeks in South Africa and the repatriation was already planned. He mentioned that his family needed to ship their furniture to two different places in Europe, which was, from his

company's perspective, not possible. Although his family circumstances required this scenario, his company was not able to approve his request, which was a challenge to him.

The last experience related to this challenge was made by Participant 7, who had already experienced two previous repatriations. He explained that repatriation often involved a family separation, as families should consider school calendars. This meant that his family might need to return to India earlier than him for his daughter to be able to start school in India at the beginning of the new school year. With his international assignment ending on a specific date and the difficult visa situation alluded to earlier, these circumstances could lead to a temporary family separation.

This challenge to show a higher degree of flexibility is a valuable contribution to the existing body of knowledge, as it has not been identified as a challenge in the literature review.

#### 4.5.6.2 Category 6.2: No planning of future career

Category 6.2 of theme six is 'No planning of future career' and the codes associated with this theme are depicted in Table 4.2. In respect of this category, three participants (Participants 3, 4 and 7) mentioned that they expected it to be difficult to find a work back in the home country that matched both the company's and the expatriate manager's aspirations. Participant 7 shared:

[...] finding the right position is you know, always tough, right. So, to match the aspirations of the self and also the aspirations and expectations of the management in India, right? So, to get an alignment it takes a lot of time and also where I am happy. So, to find the position might be challenging [...].

Participant 3 also explained that if there was a specific position he wanted to pursue following the international assignment, the timing was important as expatriate managers were restrained with regard to the starting date of the position. Participant 4 elaborated that he saw expatriates leaving the company after returning from their international assignment as no suitable position could be found for them in the company. With regard to the challenge of having no future career planning, Participant 6 shared:

[...] I don't even know whether I will go back to Germany itself. So this is a bit complicated sort of, in [company name]\*. So there's not a very clear succession plan or kind of plan for that.

At the time of the interview, Participant 6 was supposed to stay in South Africa for a further five months but he still did not know where he would move to after South Africa and which job he would do. Participant 4 also explained that she did not know what the company's plans were for her following her international assignment in South Africa, as there had been no clear career planning. She elaborated that her age might be a further challenge. She would turn 58 upon her return to Germany and was not sure if the company would still need her at that age. All of these experiences indicate a lack of career planning by the participants' companies, as the expatriate managers did not know which job they would have after their international assignment and what the future plans were in general, even if their assignment were about to come to an end. This challenge was identified in the literature review; however, it was identified as part of the first stage of the expatriate management process. Stahl (2017) pointed out the challenge of the lack of a long-term orientation, by showing that the career planning made for expatriate managers was often inadequate. Stahl (2017) referred to this challenge to be part of stage 1 of the expatriate management process, but as confirmed in the current study, this challenge is also prevalent in the repatriation stage.

#### 4.5.6.3 Category 6.3: Struggle to adapt to the home country again

Category 6.3 'Struggle to adapt to the home country again' comprises the codes as illustrated in Table 4.2. Partly based on experiences with previous international assignments, three participants alluded to the challenge of readapting to their home country. Participant 4 explained: "I guess having spent seven years outside Germany things feel different and it will be the same adjustment as moving to another location."

This comment suggests that although Participant 4 was on her first international assignment, she was aware of the challenge of readapting to her home country, given that she had lived in South Africa for almost seven years. Participant 5, who already returned to his home country shared the following:

We neglected that we thought, oh yes, we're moving back to the Netherlands and that's the country we know; that's where we come from. So that should be an easy move. But it wasn't. It wasn't."

This excerpt from Participant 5 shows that he underestimated the challenge of returning and readapting to his home country after his international assignment in South Africa. At the time of the interview, Participant 5 had been living in the Netherlands for seven months. He was still on his international assignment in South Africa at the time of the interview, but since had to return (temporarily) to the Netherlands due to visa limitations. He explained that he and his wife were still finding it difficult to readapt to their home country and found this the biggest challenge.

Also, in line with this category, several participants shared that they had enjoyed several benefits in South Africa, such as having a domestic, living in a spacious apartment or house, the pleasant weather conditions, the people's general positive attitude, and the overall low prices for services, which they did not have in their home country. Participant 5 described:

And also imagine that we were living in quite a big house in South Africa. We had a gardener. We had someone, a domestic, who was doing the cleaning, who was doing the laundry, who was doing the ironing [...]. All those kind of things. And it sounds stupid, but you have to get used to that [being without these services] again.

The experience described by Participant 5 can be linked to the differences mentioned in Hofstede's (1980) cultural dimension of indulgence. South Africa's score in this dimension is high, which indicates a focus on enjoying life, being content and generally having a positive attitude. This positive attitude was noted by Participant 6, who explained that it would be a challenge to him to not be surrounded by this positive attitude anymore when returning to Germany. According to Hofstede Insights (2023b), Germany received a low score in this dimension, which shows that German people are generally more restrained by social norms with regard to enjoying their lives. Lastly, and also in accordance with the differences between Germany and South Africa in this dimension, Participant 5 said that he had experienced much pressure from society since his return to his home country, including pressure from his family. He elaborated that his life in South Africa had been free from social pressure

and that he had to adjust to this changing again in the Netherlands, which was a challenge to him.

#### 4.5.6.4 Category 6.4: Repatriation not seen as important as other stages

Category 6.4 ‘Repatriation not seen as important as other stages’ consists of several codes as illustrated in Table 4.2. Regarding this category, Participant 4 mentioned the challenge of not receiving company support as part of the repatriation. Participant 4 earlier alluded to the fact that moving back to Germany implied the same adjustment as moving to another location, which shows that this stage is just as important as the preparation stage. However, a few participants referred to the challenge of not receiving company support such as assistance in searching for a suitable school or apartment or support in readjusting to the German culture. This finding indicates that repatriation is not deemed as important as other stages of the expatriate management process. Further, Participant 4 shared that she had wished for better communication during this stage and, for example, a process flow showing the timing of events with regard to relocating, resigning and receiving one’s contract. This points to the lack of communication pertaining to the expatriation stage by her company and the disregard of this stage. Participant 4 also emphasised the following: “I even think that it [the repatriation stage] is much more important – more effort has to be spent on the returning than into the preparation.”

Participant 4 further noted that considerable self-initiative was needed to make plans, given that the repatriation stage was not deemed as important as the other stages:

There’s a contact in the HR department there, but we haven’t discussed any future with me. Only when I was [at the HR department] last time. And it was always on my initiative, yes, where I addressed [the issue]: okay, I’m interested in another prolongation.

This statement by Participant 4 confirms the challenge of repatriation not being seen as important as the other stages of the expatriate management process. Although Participant 4 had a contact in the company’s human resources department, no plan was in place for her and everything that was proposed in this respect was based on her initiative. Lastly, and as the initiative came from Participant 4, she was afraid to catch the human resources department off guard when asking about plans for her

future. The inadequate focus on the repatriation stage was also identified as a challenge in the literature review presented in Chapter Two. Ozdemir and Cizel (2007) explain that the biggest challenge regarding repatriation that has been identified in the existing literature is that this stage of the process is often completely ignored by MNCs. Further, the study conducted by Tahir (2018) indicates that there was no strategy or plan in place for the participants' repatriation. Tahir and Egleston (2019) also found in their study that repatriation was not a priority in the expatriate management process.

#### 4.5.6.5 Category 6.5: Uncertainty about the future

The final category constituting theme six is 'Uncertainty about the future'. The selected codes associated with this category are illustrated in Table 4.2. Participant 4 noted that no one in her company had given her information about her future options. Participant 6 confirmed this challenge of uncertainty about the future by sharing the following: "I don't know where I'm going. I know neither the country nor the role nor the unit nor anything. So I don't know."

Although Participant 6 was spending his last few months in South Africa at the time of the interview, the future was still uncertain for him, which constituted a challenge to him. Participant 6 elaborated that he at least knew that he would have a job and that he would receive a salary, but that the uncertainty for his partner was higher, as she could not try to find work given that they did not know where they would have to move to after his assignment in South Africa. Lastly, Participant 6 stated that it was impossible to even plan his personal life as a result of the uncertainty regarding his work situation. This experience expressed by Participant 6 shows that the uncertainty about the expatriate managers' future jobs also affected their personal lives, which was identified as a challenge. In contrast to category 6.2, which described the challenges of not having a long-term career planning which led to the challenge of not finding a suitable job, category 6.5 focuses on the uncertainty the participants expected to experience during this stage. This uncertainty not only relates to the expatriate managers work position, but also to their partner and personal life.

This challenge is a valuable contribution to the existing body of knowledge, as it has not been identified as a challenge in the literature review.

The challenge of repatriation that is often ignored and that was also revealed in the literature review, has been confirmed in this study. However, the literature review also pointed out the challenge of remaining in contact with the headquarters – a challenge that has not been confirmed in this stage of the expatriate management process. This challenge was mentioned in theme three of this study and was thus also noted by the participants. Apart from the challenges that were reported in Chapter Two, the participants of this study highlighted several more challenges that they had expected to experience during their repatriation.

#### **4.6 CONCLUSION**

In conclusion, Chapter Four first provided an overview of the demographic profile of the respondents, which included the sample size and a description of the participants. Based on Chapter Three, the data collection strategies and their implementation were explained in more detail. Thereafter, the data analysis process and the use of thematic analysis was disclosed. Chapter Four concluded with a detailed discussion of the themes, categories and codes that were generated from the dataset. The data analysis resulted in six themes with a total of 27 categories.

The majority of the challenges that were identified during the literature review have been confirmed in this study. However, some of these challenges could not be confirmed during the empirical investigation of this study; they were complemented by several other challenges that have not been found in the literature review. One possible reason for the additional challenges encountered in South Africa is the economic disparities, which, among other things, have led to the high crime rate in South Africa. The high crime rate, in turn, resulted in the participants' experiencing a lack of basic needs and unfamiliar living conditions. A further reason is the cultural diversity, which led to challenges pertaining to stage three of the expatriate management process and especially the adjustment to interacting with host-country nationals (eg, dealing with cultural peculiarities, cultural diversity, and managing unexpected situations). A last possible reason for the additional challenges that were identified is the strict South African laws and regulations with regard to visa applications, which led to difficulties in obtaining a visa for the expatriate manager and their partner. All these challenges show that the expatriate managers in South Africa experience dif-

ferent and additional challenges compared to their counterparts in other countries. Also, insights into these additional challenges help address the research gap that was identified in this study pertaining to the lack of empirical research on expatriate management through a diverse cultural lens.

## **CHAPTER FIVE: CONCLUSIONS AND RECOMMENDATIONS**

### **5.1 INTRODUCTION**

Chapter Four presented the analysis and interpretation of the data collected in the semi-structured interviews. This included an overview of the demographic profile of the respondents, a demonstration of the data collection strategies that were used and a disclosure of the data analysis process that was applied by means of thematic analysis. Chapter Four concluded with a detailed explanation of the themes, categories, and codes that were generated from the dataset.

In Chapter Five, the conclusions and recommendations of the study are discussed. The chapter starts with a general overview of the research, its purpose and the achievement of the research objectives. The empirical findings are then summarised and conclusions and recommendations based on the findings are made, clearly highlighting the practical implications for MNCs and expatriate managers. The chapter concludes with the practical and theoretical contributions of the study, its limitations, and suggestions for future research.

### **5.2 OVERVIEW OF RESEARCH**

The purpose of this study was to explore the challenges that expatriate managers experienced (and expected to experience with regard to their repatriation) relating to the MNC's expatriate management process during and after their international assignment in South Africa. The following section provides a brief outline of the research process followed in this study to address its purpose. The section also highlights how each research objective was achieved in this study to subsequently answer the research question.

#### **5.2.1 RESEARCH PROCESS**

As part of the research process a literature review was conducted on expatriate management and the challenges that expatriate managers experienced during their international assignment. The literature review included a contextualisation of the term 'expatriate management' and an explanation of the rationales for expatriate management. Further, the cultural differences between South Africa and Germany were ana-

lysed by means of Hofstede's (1980) cultural dimensions concept and Hall's (1976) context theory. It was found that Germany and South Africa have similar scores in the dimensions of masculinity and individualism, but that they differ in the dimensions of power distance, uncertainty avoidance, long-term orientation and indulgence. With regard to Hall's (1976) context theory, it was pointed out that Germany can be classified as a low-context country, whereas South Africa can be classified as a high-context country. Following the cultural analysis of South Africa and Germany, the expatriate management process model by Ozdemir and Cizel (2007) and the expatriate adjustment model by Black (1988) were explained and combined into one model, which provided the theoretical framework for this study. After presenting the model, the challenges that were identified in the literature were presented in alignment with the theoretical model of this study, meaning that the challenges were demonstrated for each stage of the expatriate management process.

Following the literature review, a suitable research design and methodology was developed to answer the research question. In this study, an interpretivist philosophy and inductive research approach were adopted. The research was therefore qualitative in nature and semi-structured interviews were conducted with seven expatriate managers working for two different German MNCs in Gauteng, South Africa. With regard to the research instrument, the interview was introduced with a few introductory questions about the participant's professional background to ensure that the participants met the criteria to participate in the study. The introductory questions were followed by questions to identify the challenges the expatriate manager experienced and expected to experience during their international assignment. Following the data collection, the data were analysed by means of thematic analysis and the findings were presented in Chapter Four. In the following section, an overview is given on how each research objective was achieved.

### 5.2.2 RESEARCH OBJECTIVES ADDRESSED

Table 5.1 shows how each research objective and research question was achieved in this study, by providing the theoretical evidence, related questions in the interview schedule, empirical findings and the recommendations.

| Research objective (RO) and<br>Research question (RQ)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Theoretical evidence               | Data collection:<br>Interview questions           | Data analysis:<br>Empirical findings                    | Recommendations/Conclusions                                   |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|---------------------------------------------------|---------------------------------------------------------|---------------------------------------------------------------|
| RO1: To identify and empirically investigate the challenges that expatriate managers experienced during their selection/recruitment<br><br>RQ1: What are the challenges that expatriate managers experienced during their recruitment and selection for their international assignment?                                                                                                                                                                                                                                                                                                                                                                           | Section 2.2.3<br><br>Section 2.3.1 | Question 6<br><br>Question 7                      | Section 4.5.1                                           | Section 5.3.3.1                                               |
| RO2: To identify and empirically investigate the challenges that expatriate managers experienced during their preparation for their international assignment.<br><br>RQ2: What are the challenges that expatriate managers experienced during their preparation for their international assignment?                                                                                                                                                                                                                                                                                                                                                               | Section 2.2.3<br><br>Section 2.3.2 | Question 8<br><br>Question 9<br><br>Question 10   | Section 4.5.2                                           | Section 5.3.3.2                                               |
| RO3: To identify and empirically investigate the challenges that expatriate managers experienced during their foreign assignment, especially about their adaptation in the following areas:<br>a. adjustment to work;<br>b. adjustment to interacting with host-country nationals; and<br>c. adjustment to the general non-work environment.<br><br>RQ3: What are the challenges that expatriate managers experienced during their foreign assignment, especially about their adaptation in the following areas:<br>a. adjustment to work;<br>b. adjustment to interacting with host-country nationals; and<br>c. adjustment to the general non-work environment. | Section 2.2.3<br><br>Section 2.3.3 | Question 11 a, b, c                               | Section 4.5.3<br><br>Section 4.5.4<br><br>Section 4.5.5 | Section 5.3.3.3<br><br>Section 5.3.3.4<br><br>Section 5.3.3.5 |
| RO4: To identify and empirically investigate the challenges that expatriate managers expected to experience during and after their repatriation to their country of origin.<br><br>RQ4: What are the challenges expatriate managers expected to experience during and after their repatriation to their country of origin?                                                                                                                                                                                                                                                                                                                                        | Section 2.2.3<br><br>Section 2.3.4 | Question 12<br><br>Question 13<br><br>Question 14 | Section 4.5.6                                           | Section 5.3.3.6                                               |

Table 5.1: Research questions and objectives addressed in the current study

Source: Researcher's own construction

### 5.3 SUMMARY OF EMPIRICAL RESULTS

In the following sections, the empirical results are summarised. First, a brief summary of the participant's demographic profile is given, followed by a brief overview of how this study addressed the issues of trustworthiness and rigour. In the last section, the findings from the thematic analysis are discussed and conclusions and recommendations are offered that highlight the implications of the findings for MNCs and expatriate managers.

#### 5.3.1 PROFILE OF RESPONDENTS

As explained in Chapter Four (see section 4.2.1), the sample consisted of seven participants. Of the seven participants six were male and one was female. Their ages were well distributed between the ages of 30 and 60 years. The seven participants had lived in South Africa for between one and eight years, came from four different countries, three of which were European countries, and they were either on their first, second or on their third international assignment (see Chapter Four, Table 4.1)

#### 5.3.2 TRUSTWORTHINESS AND RIGOUR OF THE STUDY

In order to ensure the trustworthiness and rigour of this study, the principles of credibility, transferability, dependability, and confirmability were applied (see Chapter Three, section 3.7.4). To ensure credibility, the researcher asked every participant if they wanted to see the transcript of the interview again. The direct quotes of the participants were presented in Chapter Four. To achieve the transferability of this study, the research context and data collection methods were described in detail (see Chapter Three, section 3.7.4) and the participants represented a diverse profile. To ensure the dependability of this study, the researcher provided a transparent and detailed presentation of the research design and plan in Chapter Three. Finally, the principle of confirmability was ensured by the researcher's use of a reflexive approach throughout the entire research process.

#### 5.3.3 DISCUSSION AND RECOMMENDATIONS FROM THEMATIC ANALYSIS

In the following sections, the six themes that constitute the findings of the thematic analysis are discussed. Furthermore, conclusions are drawn based on the findings and

recommendations are made to address the challenges that were identified.

#### 5.3.3.1 Theme one: Challenges experienced during recruitment and selection for the current position

As explained in Chapter Four (see section 4.5.1), the most important challenges relating to theme one were the ignorance among the participants' companies towards soft skills; the poor internal communication at these companies; and the resultant uncertainty among the expatriate managers. On the one hand, the uncertainty was attributed to company processes and circumstances and, on the other hand, it was caused by external factors. Theme one provided the answer to the first research question, RQ1 (see Chapter Four, Table 4.2). Regarding category 1.1, and concerning this theme, the findings revealed that the companies disregarded soft skills when they selected candidates for international assignments given that experience in previous international assignments was deemed mandatory for future management roles. To address this challenge, both the MNCs and the candidates for international assignments need to be aware of this challenge. Companies could, for example, analyse their data of expatriate failure by assessing the failure rate of the company. Further, the MNCs should consider both the candidates' soft skills and their personal characteristics, such as interpersonal skills, cultural empathy and adaptation skills. Candidates, on the other hand, should only accept an international assignment if they are interested in taking this step and not because it is a requirement to obtain future management positions in the company. These recommendations confirm the findings that indicate that companies should sense when candidates are interested in the international assignment and that candidates should not be forced to accept such an assignment. Both the expatriate manager and the team in the host country will most likely suffer from a selection in which the soft skills of the candidate were not considered.

Category 1.2 explained the challenge of poor internal communication during the selection process. To manage this challenge, the MNCs should communicate as openly and transparently as possible during the entire expatriate management process, as taking part in an international assignment is a bold step for expatriate managers, who have to make considerable sacrifices in leaving their home country. In this situation, any kind of communication is welcome and helpful for the candidate to reduce their uncertainties. These uncertainties can be addressed by providing the expatriate man-

ager with constant feedback on the status quo of the recruitment and selection process to provide more transparency on when a decision can be expected. Further, MNCs should make sure that the internal communication among their different departments is efficient by introducing clear policies and procedures.

The recommendation of open and transparent communication also applies to category 1.3, which describes the challenge of uncertainties owing to company processes and circumstances, such as the long waiting time until a decision has been made or uncertainties regarding the outcome of this decision. If MNCs communicate openly, this challenge of facing uncertainties can also be diminished or even overcome.

Category 1.4 pertains to uncertainties owing to external factors. In this study, the external factors referred to two aspects: The COVID-19 pandemic and family issues. The uncertainties that COVID-19 in particular caused were extremely difficult to reduce, as neither the company nor the candidates could influence these factors. However, the MNC could address the challenge of family issues by providing family support to the expatriate manager from the first stage of the expatriate management process onwards. This support can, for example, be in the form of an orientation programme on family-related topics and/or consulting services to family members. These offerings should be communicated effectively by attending to them in the very first meetings with the candidate or by adding the offerings to the company's policies on expatriation.

In conclusion, and based on the findings presented in Chapter Four, open, effective and transparent communication is a key recommendation to overcome the challenges that the participants experienced during the first stage of the expatriate management process. In addition, selecting the most suitable candidate and considering all the necessary soft skills is of high importance to increase the chances of a successful international assignment.

#### 5.3.3.2 Theme two: Challenges experienced during the preparation for the international assignment

The second theme, which consolidates the challenges that the expatriate managers experienced during the preparation for their international assignment, was developed

from seven categories which provide the answer to RQ2 (see Chapter Four, Table 4.2). The key challenges relating to theme two were as follows: the uncertainties caused by COVID-19; the unfamiliar living and working conditions; the companies' poor internal communication on the expatriate management process; the unclear situation for the expatriate's partner; a high need for self-initiative; training that did not adequately prepare expatriates for their assignment; and, finally, obtaining a visa.

The first category of theme two refers to the challenge of COVID-related uncertainties. Similar to category 1.4, this challenge was due to external factors, which neither the company nor the expatriate manager could influence. Showing a certain degree of flexibility in the starting date of the assignment and a willingness to relocate to an unknown destination, however, should diminish the challenge of uncertainty for expatriate managers.

The second category in theme two (category 2.2) describes the expatriate's challenge of being confronted with unfamiliar living and working conditions. To address this challenge, communication between the MNC and the expatriate manager should be as clear and transparent as possible. MNCs should be aware of changes in company benefits, such as the non-availability of a company car, and inform the expatriate manager accordingly. Considering the requirements for the expatriate's accommodation, requirements should always be made clear to the service providers by the MNC and the expatriate in finding suitable accommodation. Furthermore, it might be helpful to provide the expatriate managers with a document containing recommendations on all the aspects that the expatriate managers might need to know. These recommendations, which should be made by previous expatriate managers who have worked in South Africa before, could include information about situations that they had not expected or general recommendations about good residential areas. A document containing such information could serve as a written mentorship network. The findings revealed that expatriate managers sometimes had contact with other or previous expatriate managers who were on an international assignment in South Africa. Two participants in the current study explained that this exchange had been most helpful as they could share experiences and learn from one another. As these former expatriates had been in the same situation as the participants, they were familiar with the questions that expatriate managers had and would be able to make recommendations to the human resources department that this department might otherwise not

have been aware of. A document containing all these recommendations could also be helpful to those expatriate managers who do not have connections with previous expatriate managers. In this way, the expatriate managers might be able to overcome the aforementioned challenges. Lastly, it is recommended that information and guidance be included on the host country's property market in the pre-departure training that the expatriate managers receive.

Category 2.3 refers to the challenge of poor internal communication on the whole expatriate management process. Participants raised the point that the process had not been understood, that there had been no transparent communication of the policies and that some unexpected situations had occurred. To overcome this challenge, a document containing recommendations by previous expatriate managers (see recommendations for category 2.2), might be a useful tool. In addition, MNCs should make sure that every expatriate manager has a clear point of contact in the human resources department who could guide the expatriate manager through the entire expatriate process and the relevant policies before starting their international assignment. This could be achieved by, for example, briefing sessions that should be offered as soon as possible in the expatriate management process. In this way, the challenges emanating from poor communication might be eradicated.

Category 2.4 explains the challenge of the expatriate manager's partner experiencing an unclear situation. Participants mentioned that there had been a lack of support for their partners and that the partners' situation with regard to obtaining a work permit for South Africa had not been made clear. The recommendations about providing an information document (see recommendation for category 2.2) and having access to a clear point of contact could solve this challenge. MNCs should further be aware that the success of the partner's adaptation has an influence on the success of the overall international assignment and that expatriate failure results in high costs (see Chapter Two, sections 2.3.3 and 2.3.5). Consequently, MNCs should not neglect the expatriate manager's partner and should offer the same support that they offer to the expatriate manager. The support to partners should be stated in detail and clearly in the company's policies on expatriate management to avoid that expatriate managers are not aware of this support. On the other hand, expatriate managers should not only rely on the support provided by the MNC, but should do their own research to avoid being confronted with unexpected surprises pertaining to the partner's situation.

The fifth category of theme two (category 2.5) covers the challenge of having to show self-initiative to manage the administrative processes, as the preparation processes for the international assignment were either not intact or not in place. To address this challenge, MNCs should review their preparation process by, for example, requesting honest feedback from previous expatriate managers after the completion of their international assignment. Based on this feedback, MNCs would be able to identify areas with potential for optimisation. Furthermore, MNCs should review the performance of third-party service providers to ensure that expatriate managers receive the necessary support in this regard. As was recommended in the case of category 2.3, a dedicated point of contact in the human resources department could further help the expatriate manager with the administrative processes.

Category 2.6 refers to the challenge of the cross-cultural training that did not prepare the expatriate manager adequately for their assignment. The training was either not offered on the correct platform, not timeous, not context-specific, not comprehensive enough or it was non-existent. Since the importance of adequate cross-cultural training to expatriate managers was pointed out in both the literature review (see Chapter Two, section 2.3.2), and in this study, MNCs should attend to this challenge. With regard to the training, the MNCs should communicate with the expatriate managers as soon as possible and provide them with different options regarding the time and platform that will be used. As explained earlier in this study (see Chapter Two, section 2.3.2), cross-cultural training is cost-intensive for MNCs. However, MNCs should not try to save costs by, for example, offering combined training for expatriate managers who are relocating to different countries, as this study confirmed that combined training leads to further challenges for the expatriate managers. These challenges were experienced by one of the participants, who attended a training session along with other expatriate managers who were assigned to different countries. This participant alluded to the challenge of not having received context-specific training. Other challenges that were identified in theme four should also be covered in cross-cultural training, to prepare the expatriate manager as far as possible for their assignment in South Africa. For example, MNCs should offer training that includes cultural intelligence. According to Yari, Lankut, Alon and Richter (2020: 211), cultural intelligence (CQ) refers to “the ability to succeed in a cross-cultural environment and comprises several dimensions, including cognitive, metacognitive, motivational, and behavioural CQ”. Azevedo and Shane (2019) further emphasise the grow-

ing importance of understanding cultural intelligence and the reasoning for people functioning better or worse in cross-cultural settings. The authors explain that a focus on the cultural value frameworks is not sufficient anymore to prepare workers working in an international context and that training in CQ can close this gap by providing an integrated approach for employees to develop cross-cultural capabilities (Azevedo & Shane, 2019). As a result, one reason that cross-cultural training was deemed incomplete and a challenge in the current study can be found in the aforementioned findings by Azevedo and Shane (2019). To close this gap and provide adequate and comprehensive cross-cultural training to expatriate managers, MNCs should also offer CQ training that would prepare the expatriate managers to function successfully in the cross-cultural environment of South Africa.

The last challenge that was identified under theme two (category 2.7) was the difficulty in obtaining a visa. Participants raised the issue that there had been no clear guidance, that it had been a long and difficult process, that there had been much uncertainty involved, that visa requirements were from the host country's perspective, and that the third-party service provider had not supported them in the expected way. As several visa-related challenges were mentioned by all the participants except for one, the MNCs should try to make this process as effortless as possible for the expatriate managers and also plan and prepare the visa process as early as possible. In addition, the implications of visa challenges included a delayed start of the assignment or family issues (eg, temporary family separation or limited work opportunities for the expatriates' partners). The MNCs should provide professional and efficient support so that the expatriate manager is not left on their own with this critical and challenging issue. This support should also include support to the expatriates' partners or assistance with obtaining family visas. Professional support by, for example, a dedicated team of legal and immigration experts, should include clear guidance on what is needed to obtain the required visa, status updates, and transparent communication. Although some of the issues (such as the visa document requirements being from a host-country perspective) are beyond the control of the MNC, the expatriate manager and a professional third-party service provider, these challenges could still be mitigated by consulting legal and immigration experts.

In conclusion and to summarise, based on the findings in Chapter Four, the following recommendations are made with regard to theme two: providing a document with

recommendations by previous expatriate managers; making available a single point of contact in the human resources department to the expatriate manager; offering briefing sessions about the expatriate management process; providing comprehensive expatriate partner support; obtaining feedback from previous expatriate managers about challenges they experienced; offering comprehensive cross-cultural training that includes cultural intelligence; starting as early as possible with the visa application process; and, lastly, providing professional support in obtaining a visa. These recommendations can diminish the challenges that were experienced by the expatriate managers taking part in this study.

#### 5.3.3.3 Theme three: Challenges experienced regarding position, tasks and responsibilities while being on international assignment

Theme three, which covers the challenges that the expatriate managers experienced regarding their position, tasks and responsibilities in South Africa, was created based on four categories, providing the answer to RQ3a (see Chapter Four, Table 4.2). The key challenges relating to this theme were dealing with and working in the unknown; managing unexpected situations; disrupted relationships because of physical distance; and working in a different organisational structure and culture.

Category 3.1 refers to the challenges of dealing with and working in the unknown. Expatriate managers shared that they did not have a job description or did not have prior knowledge and experience with regard to their new position in South Africa. To manage this challenge effectively, MNCs should make sure that the expectations of the expatriate manager are shared and communicated clearly and transparently before the international assignment begins. The MNCs should also and as far as possible provide a job description of the expatriate manager's work in South Africa.

The second category of theme three includes the challenges of dealing with unexpected situations. This category was based on discrepancies between expectation and reality in the South African subsidiary, a lack of preparation for the international assignment and the need to deal with unexpected occurrences, which all posed a challenge to the participants. To overcome this challenge, clear and transparent communication of the situation in the host-country and the MNC's expectations of the expatriate manager is of high importance. Further, a comprehensive handover of the new

tasks should take place between the expatriate manager and his or her predecessor or a South African colleague. This handover could then also include preparation for country-specific topics or peculiarities.

Category 3.3 relates to the disrupted relationships because of the distance between either the headquarters and the expatriate manager or between the expatriate manager and their South African colleagues. More specifically, these challenges involved difficulties to the expatriate manager to do their work, which negatively affected the team dynamics, and the expatriate manager not being connected with the headquarters. The disrupted relationships between the headquarters and the expatriate manager were in all cases due to the COVID-19 restrictions or the long process in obtaining a visa, both of which were beyond the control of the MNC and the expatriate manager. However, one of the participants mentioned that he had visited South Africa before his assignment, and that it had been very helpful as he could meet his new colleagues in person. The importance of meeting colleagues in person was confirmed by several participants in this study. Consequently, MNCs should not shy away from the costs of a look-and-see visit, as it might be very useful for the expatriate manager if unforeseen situations (such as visa difficulties) happened at a later stage of the process, possibly delaying the expatriate manager's relocating to South Africa. To make sure that the relationship between the expatriate manager and the headquarters does not derail, MNCs should provide the opportunity for the expatriate manager to visit the headquarters at least once a year, which can help the expatriate manager to be informed about and updated with relevant headquarter matters. MNCs should further ensure that the expatriate managers are still included in all company communication.

The last category of theme three pertains to working in a different organisational structure and culture, which includes challenges such as adapting to a different organisational culture, not knowing the host country's company processes, balancing diverse requirements between functional and regional responsibilities and being confronted with a different level of education in the host country. To overcome this challenge, a so-called buddy system can be implemented, which refers to a programme that is used in many companies to onboard employees. The notion of a buddy system was supported by one of the participants who was also of the view that such a support mechanism could add value to address this challenge and provide assistance with, for example, questions about the company's local processes, understanding

South African peculiarities or how to deal with the local culture. Last, comprehensive cultural training, eg, to enhance cultural intelligence, could also add value and possibly mitigate this challenge.

To summarise, the recommendations based on theme three focus on the MNCs' offering various services and support to the expatriate manager. These include offering comprehensive cross-cultural training, communicating expectations clearly and transparently, offering a look-and-see visit to the host country and a yearly visit to the headquarters, and implementing a buddy system for expatriates.

#### 5.3.3.4 Theme four: Challenges experienced regarding interaction and communication with host-country nationals while being on international assignment

Being partly similar to theme three, theme four relates to the expatriate adjustment stage, but focuses specifically on the challenges the expatriate managers experienced in their interaction and communication with the host-country nationals. The theme comprises four categories, presenting the answer to RQ3b (see Chapter Four, Table 4.2) and comprises the main challenges of navigating emotional communication in a sensitive culture, dealing with cultural peculiarities, establishing relationships with locals, and functioning in cultural diversity. Regarding the first category, which includes challenges regarding the navigation of emotional communication in a sensitive culture, several of the participants experienced challenges that required them to change their communication style or to communicate more sensitively with host-country nationals. These were explained by the differences between South Africa and Germany in Hall's (1976) context theory, with South Africa being a high-context culture and Germany being a low-context culture. Hall's (1976) context theory may explain the reason with respect to altering communication, but expatriate managers might not have been aware of these differences. To manage these challenges, concepts such as Hall's (1976) context theories, but also CQ and the general differences between South African and German communication styles should be included in the cross-cultural training that expatriate managers receive before relocating to South Africa.

Category 4.2 comprises the challenge of dealing with cultural peculiarities, such as having to follow up on people concerning, for example, emails that have been sent or

the slower pace of doing things, for example walking, in South Africa. To manage and mitigate this challenge, comprehensive cultural training, a buddy system, or a document containing recommendations made by previous expatriate managers could advise the expatriate managers how to manage their expectations in this regard.

The third category of theme four pertains to the challenges related to the establishment of relationships with South Africans. Participants shared that they had experienced difficulties in achieving full integration, making friends and forming relationships with host-country nationals. To address this challenge, the inclusion of CQ in cross-cultural training would provide the expatriate managers with the needed knowledge about ways to function successfully in cross-cultural environments and therefore help them enhance their relationships with host-country nationals. A further recommendation to address the challenge of establishing relationships with host-country nationals is to attend local events or clubs that align with one's personal hobbies or interests, such as volunteer groups, sports clubs or art groups.

The last category of theme four is the challenge of cultural diversity. Participants referred to their experiencing challenges in understanding the impact of diverse racial backgrounds and ethnic histories on relationships, managing diverse teams and navigating diverse cultures. Similar to category 4.3, comprehensive cross-cultural training including the concept of CQ can be a way to overcome this challenge, as the CQ training can increase cultural awareness and sensitivity. Further, MNCs should make sure that all expatriate managers attend cross-cultural training and that different options are provided with regard to timing, platforms and contexts.

In conclusion, the recommendations to overcome the challenges explained in theme four are as follows: MNCs should provide comprehensive cross-cultural training that should also include important concepts such as CQ and Hall's (1976) context theory; expatriates should attend clubs or events in the host country that align with their interests to establish relationships with the local people; MNCs should consider offering more short-term international assignments to possible candidates to consider them for long-term international assignments. By attending short-term international assignments, the candidates can gain valuable international experience and intercultural skills. In the same vein, the MNC will be able to decide on whether a candidate should be considered for a long-term international assignment.

#### 5.3.3.5 Theme five: Challenges experienced regarding general adjustment while being on international assignment

Like the previous two themes, theme five is also part of the expatriate adjustment stage, but the focal point is the expatriate manager's general adjustment. The theme comprises three categories and presents the answer to RQ3c (see Chapter Four, Table 4.2). The theme includes the challenges with regard to changes in the expatriate's family set-up that affect the success of the international assignment, the lack of basic needs and settling in requires time. Category 5.1 refers to the challenges that expatriates experienced due their changing family circumstances, which may affect the success of the international assignment negatively. The participants explained that it was extremely difficult for the partners to obtain a work visa in South Africa, which severely limited their opportunities and required them to make sacrifices, such as not working at all or studying instead of working. The findings further revealed that the expatriates' partners needed to have certain personality characteristics, such as high levels of pro-activity and self-initiative, to be able to adapt successfully to the new life in South Africa. This challenge was mostly caused by the limited work opportunities for the partners in South Africa, which was further exacerbated by legal restrictions regarding visas, which in turn was beyond the control of both the MNC and the expatriate manager. Although it is still not possible to overcome this challenge completely, the MNC and the expatriate manager can mitigate this challenge. For example, the expatriate manager and his or her family must be well aware of the limited work opportunities for their partners in South Africa so that the expatriate manager can assess if relocating to South Africa would be a feasible option for the whole family. To make this decision, it is recommended that the expatriate managers conduct research on the host country's social, economic and immigration situation. Furthermore, a document containing recommendations made by previous expatriate managers with regard to their earlier experiences, or general exchanges with previous expatriate managers may help the expatriate manager and his or her family to assess the situation. In this respect, the MNC must support the expatriate manager as far as possible, by, for example, providing professional support in choosing the appropriate visa, establishing contact with previous expatriate managers or sharing experiences from previous international assignments with the expatriate manager. In the event of this challenge occurring only after the expatriate manager has arrived in the country on their international assignment, it is recommended that the partners should get in-

volved in activities that they enjoy. In this regard, one participant's wife struggled to live in South Africa without being able to work, but as soon as she became involved with hobbies and/or activities that she enjoyed (such as the arts, volunteering, and the animal rescue service) she was able to adapt successfully and the risk of expatriate failure was mitigated.

Category 5.2 explains the challenge of expatriates' experiencing a lack of basic needs in South Africa, which included load-shedding and its effect on traffic, safety, limited mobility options and adjusting to the unfamiliar safety situation. This challenge was also caused by external factors, which neither the MNC nor expatriate manager could change. However, it is advisable that expatriate managers relocating to South Africa receive training on safety issues. The empirical findings revealed that safety training sessions, which were attended by expatriate managers soon after their arrival in South Africa, helped them significantly. This kind of training can be offered in addition to cross-cultural training and should include general safety aspects, such as recommended behaviour to avoid general safety issues, and also during load-shedding hours, especially when in traffic.

The last category of theme five expresses the challenge of adjusting or settling in completely, which requires time. The participants explained that they were not able to start their new life immediately as they were living in temporary accommodation or that it was difficult to be fully accepted in the new environment. To mitigate this challenge, the MNC should continue offering look-and-see visits. In doing so, expatriate managers can investigate appropriate housing, which would speed up the move to their final accommodation once they arrive in South Africa. To be accepted in the new environment expatriate managers must attend comprehensive cultural training, as this might enhance their ability to understand the South African culture better, and thus enabling them to adapt quicker. Expatriate managers could further participate in cultural immersion activities, such as visits to important landmarks or festivals to learn more about the host country's culture.

The recommendations to both MNCs and expatriate managers to overcome the challenges pointed out in theme five are summarised as follows: conducting more research on the host country; communicating clearly and transparently; establishing contact with previous expatriate managers; attending safety training sessions; offer-

ing look-and-see visits to the host country; offering comprehensive cross-cultural training; and participating in cultural immersion activities.

#### 5.3.3.6 Theme six: Challenges expected to experience during the repatriation

Theme six involves challenges that the expatriate managers experienced and expected to experience during their repatriation. This theme includes five categories and provides the answer to RQ4 (see Chapter Four, Table 4.2). The main challenges found were the following: the need for a higher degree of flexibility among both the MNCs and the expatriate managers; the lack of MNCs' planning of the expatriate's future career; expatriates' struggling to adapt to their home country after their return; the repatriation stage that was not deemed as important as the other stages of the expatriation management process and the expatriates' uncertainty about their future.

Category 6.1 includes the challenge of the need for expatriate managers to show a higher degree of flexibility, as most likely sacrifices will need to be made by the expatriate manager owing to limited open job positions in the home country. Furthermore, there might be no control over the expatriate manager's future location choices, inflexible company processes such as the company not being able to despatch their belongings to two different locations, and temporary family separation. To overcome these challenges, MNCs should be as flexible as possible, to provide a suitable solution to all returning expatriate managers. In addition, and to avoid the expatriate manager having to make sacrifices, the repatriation process should start earlier, that is, at least six months before the planned end date of the international assignment. In this way, the expatriate manager can investigate and assess the available job positions to make sure a suitable position is found. Involving the expatriate manager from an early stage is important to ensure a successful repatriation. This can be supported by regular career planning meetings, for example, between the expatriate manager and the human resources department. To this end, future possible jobs can be discussed and if a suitable position opens, the expatriate manager can decide to repatriate at an earlier stage and avoid sacrifices in finding a suitable job at a later stage. Consequently, if the process starts earlier and there is constant exchange between the HR department and the expatriate manager, the expatriate manager's need to show a high degree of flexibility might be reduced.

The challenge of flexibility complements Category 6.2, which refers to the challenge of not planning the future career of expatriate managers. This category further involves the challenge of not being able to find a suitable work position for the expatriate manager in the home country, because of the lack of career planning. Therefore, regular exchange between the expatriate manager and the human resources department or their managers is recommended to ensure that all possible options for their future are contemplated and plans are being made. As experienced by one of the participants, this approach could give more certainty to expatriate managers.

Category 6.3 comprises the challenge of readapting to the home country again. Participants shared that they expected to miss South Africa and the benefits of living there and that they expected difficulty in readapting to the life in their home country. To overcome this challenge, it is recommended that MNCs offer voluntary training for expatriate managers as part of the repatriation process, especially to those expatriates having lived in a foreign country for a longer period. This additional form of training could prepare the expatriate managers and their families for the life in their home country and in general for the challenges that they might not expect.

Category 6.4 expresses the challenge of expatriate managers' experiencing that the repatriation stage was often not seen as important as the other stages. No support was offered, individual situations were not being understood, processes and options were not communicated effectively and the need for self-initiative was high. To overcome these challenges, MNCs must acknowledge the importance of the expatriation stage and not be disregarded. As explained in this study and also by a few participants, an unsuccessful repatriation can lead to the expatriate manager leaving the company. Consequently, it is recommended that MNCs put as much effort into this stage as in the other stages. Repatriation should start early and with the constant involvement of the expatriate manager. Company processes and policies should be communicated by the human resources department to make sure that the expatriate manager is aware of everything they need to know. Last, it is recommended that MNCs obtain feedback from returning expatriate managers on optimisation their potential, to make sure that the repatriation process is constantly developed.

The last category of theme six includes the challenge of the expatriate managers' being uncertain about their future. Participants explained that they were not aware of

the possible options or about what would happen next. This also affected their personal lives, as the situation was even more uncertain for their partners and they were not able to plan their personal lives, including holidays. To overcome this challenge, the constant and early involvement of the expatriate manager in the expatriate management process and regular career discussion meetings can be beneficial.

In summary, the recommendations to mitigate the challenges of theme six are as follows: an early start of the repatriation process; regular meetings to discuss future career options; a constant and early involvement of the expatriate manager; a stronger focus on the expatriation stage; and additional training to enhance the success of the expatriate manager's adjustment to the home country.

In view of the recommendations provided in the preceding sections, the contributions of the study are discussed next.

#### **5.4 CONTRIBUTION OF THE STUDY**

This study contributes to the existing body of knowledge on expatriate management from both a practical and a theoretical perspective. The practical perspective relates to all the recommendations offered in section 5.3.3, which can be valuable for MNCs that want to optimise their expatriate management process. From a theoretical perspective, the existing theory has been confirmed in this study, but new challenges that have not been identified in the literature review have been disclosed. These new challenges provide a significant contribution to the existing body of knowledge. In stage one of the expatriate management process (recruitment and selection), the newly identified challenges are uncertainties for the expatriate manager due challenges with company processes and the external factors such as the COVID-19 pandemic and poor internal communication by the MNCs. Newly identified challenges in stage two of the expatriate management process (pre-departure preparation) are COVID-related uncertainties, unfamiliar living and working conditions in the host country, overcoming obstacles in the administrative processes by showing self-initiative, and difficulties in obtaining a visa. Newly identified challenges regarding stage three (expatriate adjustment) are managing unexpected situations, cultural diversity, changes in family circumstances, and a lack of basic needs – all of which may affect the overall success of the international assignment. With regard to the last stage of

the expatriate management process (repatriation), the need for expatriates and MNCs to show a higher degree of flexibility and the expatriates' uncertainty about the future are the two key challenges that were identified.

## **5.5 LIMITATIONS OF THE STUDY AND RECOMMENDATIONS FOR FUTURE RESEARCH**

Despite that this study closed the gap in the current research the study comes with its limitations. The first limitation of this study is the narrowing of the sampling frame. The sampling frame was limited to Western MNCs doing business in Gauteng, South Africa and the interviews were conducted in two German MNCs. Consequently, this study is not necessarily representative of the whole of South Africa, as some challenges the expatriate managers experienced (such as load-shedding and traffic and people's culture) may be province-related and thus different in other South African provinces. Also, it is important to note that some of these challenges, such as difficulties in obtaining a visa, the lack of basic needs, and cultural diversity, may be very specific to South Africa. To this end, caution should be exercised when generalising the findings of this study as the participants' subjective opinions and experiences could have influenced the challenges that were identified. Further, the challenges can also be different for expatriate managers who do not work for German MNCs. As a result, an area for future research would be to conduct a similar study in, for example, other South African provinces or in non-German MNCs. It would further be of interest to conduct the same study in more than two MNCs in Gauteng and to compare the results to those of the current study. The second limitation of this study is the sampling method and size (see Chapter Three, section 3.7). A non-probability sampling technique was used, which could have led to sampling bias in the selection of the MNCs and the participants. Consequently, a recommendation for future research would be to conduct the same study but with probability sampling. Further, the sample size led to a point of saturation but the sample was rather small with only seven participants and a majority of male participants. Thus, a recommendation for future research would be to do the same study with a larger sample and a more diverse team of males and females to obtain more representative findings. The third limitation of this study is the pilot testing. Owing to time restraints, pilot testing was conducted by two individuals who reviewed the questions to identify any sensitive questions or topics (see Chapter Three, section 3.7). To ensure a more comprehen-

sive pilot testing, a recommendation for future research would be to thoroughly test the research instrument by, for example, interviewing the first participant as a test only and reviewing the interview questions based on the success of and the feedback from the first interview. A last recommendation would be to conduct a quantitative study on the challenges experienced during the expatriate management process. In this instance, the challenges identified in this study can be empirically tested by means of a deductive approach and survey strategy, therefore adopting a positivistic research philosophy. Such a study could further explore categories that had limited support with regard to the codes that were identified in this study.

## **5.6 CONCLUSION**

The purpose of this study was to explore the challenges that expatriate managers experienced (and expected to experience about their repatriation) relating to the MNC's expatriate management process during and after their international assignment in South Africa (see Chapter One, section 1.4). The study was guided by the research question 'What are the challenges expatriate managers experienced and expected to experience about their recruitment and selection, preparation, adaptation and repatriation, during and after their foreign assignment in South Africa?' The literature review revealed several challenges that expatriate managers generally experience during the four stages of their international assignment. The literature review further provided a background to the cultural and theoretical concepts and theories that were important to understand the challenges. Semi-structured interviews were conducted with seven participants working at two different German MNCs in Gauteng, following the interpretivism research philosophy. The data collected in these interviews were analysed using thematic analysis. Six themes with a total of 27 categories were developed to analyse the challenges and provided the answer to each research question formulated (ie, subquestions). The analysed challenges were further compared to the challenges that were identified in the literature and recommendations were provided to overcome these challenges in the future. The findings of this study showed that the participants experienced several challenges, some of which have already been identified in the literature review, and some of which were in addition to the challenges that were extracted from the existing body of knowledge. These challenges confirmed and eventually closed the research gap that was outlined in Chapter One.

To conclude this study, it can be said that the expatriate managers who were interviewed experienced and expected to experience several challenges during and after their international assignment in South Africa. However, the fact that one of the challenges – that was mentioned by several participants – is the missing of the benefits of their life in South Africa, shows that despite the challenges, the international assignment has been and is still enjoyed by the participants.

Although expatriate managers may encounter several challenges during an international assignment, these assignments also offer opportunities for personal and professional growth and are an ideal opportunity to step outside one's comfort zone. In the words of Neale Donald Walsch:

"Life begins at the end of your comfort zone."

## REFERENCE LIST

Abugre, J.B. Cross-cultural communication imperatives - Critical lessons for Western expatriates in multinational companies (MNCs) in sub-Saharan Africa. *Critical Perspectives on International Business*, 14 (2/3): 170-187. [Online]. DOI: [10.1108/cpoib-01-2017-0005](https://doi.org/10.1108/cpoib-01-2017-0005) [Accessed 05 April 2023].

Alizadeh Afrouzi, O. 2021. Humanitarian behavior across high-/lowcontext cultures: a comparative analysis between Switzerland and Colombia. *Journal of International Humanitarian Action*, 6(2). [Online]. DOI: [10.1186/s41018-020-00088-y](https://doi.org/10.1186/s41018-020-00088-y) [Accessed 16 August 2023].

Azevedo, A. and Shane, M.J. 2019. A new training program in developing cultural intelligence can also improve innovative work behavior and resilience: A longitudinal pilot study of graduate students and professional employee. *The International Journal of Management Education*, 17(3): 100303. [Online]. DOI: [10.1016/j.ijme.2019.05.004](https://doi.org/10.1016/j.ijme.2019.05.004) [Accessed 28 September 2023].

Bezuidenhout, R. and Cronje, F. 2021. Qualitative data analysis. In: du-Plooy-Cilliers, F., Davis, C. and Bezuidenhout, R.M. eds. 2021. *Research matters*. Claremont: Juta, Chapter 16: 262-287. [Online]. Available on EBSCOhost at: <https://ezproxy.iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=nlebk&AN=746917&site=ehost-live&scope=site> [Accessed 17 March 2023].

Bezuidenhout, R. and Strydom A. 2021. Qualitative data collection. In: du-Plooy-Cilliers, F., Davis, C. and Bezuidenhout, R.M. eds. 2021. *Research matters*. Claremont: Juta, Chapter 13: 199-224. [Online]. Available on EBSCOhost at: <https://ezproxy.iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=nlebk&AN=746917&site=ehost-live&scope=site> [Accessed 17 March 2023].

Black, J.S. 1988. Work role transitions: A study of American expatriate managers in Japan. *Journal of International Business Studies*, 19: 277-294. [Online]. DOI: [10.1057/palgrave.jibs.8490383](https://doi.org/10.1057/palgrave.jibs.8490383) [Accessed 11 March 2023].

Black, J.S. and Stephens, G.K. 1989. The influence of the spouse on American expatriate adjustment and intent to stay in Pacific Rim overseas assignments. *Journal of Management*, 15(4): 529-544. [Online]. DOI: [10.1177/014920638901500403](https://doi.org/10.1177/014920638901500403) [Accessed 11 March 2023].

Braun, V. and Clarke, V. 2006. Using thematic analysis in psychology. *Qualitative Research in Psychology*, 3(2): 77-101. [Online]. DOI: [10.1191/1478088706qp063oa](https://doi.org/10.1191/1478088706qp063oa) [Accessed 19 July 2023].

Braun, V. and Clarke, V. 2014. Thematic analysis. *Qualitative Research in Psychology*, 3: 1947-1952. [Online]. DOI: [10.1037/13620-004](https://doi.org/10.1037/13620-004) [Accessed 19 July 2023].

Braun, V. and Clarke, V. 2016. Thematic analysis. *The Journal of Positive Psychology*, 12(3): 297-298. [Online]. DOI: [10.1080/17439760.2016.1262613](https://doi.org/10.1080/17439760.2016.1262613) [Accessed 19 July 2023].

Bryman, A. 2012. *Social science research*. 4th ed. New York: Oxford University Press.

Caligiuri, P. and Bonache, J. 2016. Evolving and enduring challenges in global mobility. *Journal of World Business*, 51(1): 127-141. [Online]. DOI: [10.1016/j.jwb.2015.10.001](https://doi.org/10.1016/j.jwb.2015.10.001) [Accessed 08 March 2023].

Cavusgil, S.T., Knight, G. and Riesenberger, J.R. 2012. *International business: The New Realities*. 2<sup>nd</sup> ed. Boston: Pearson Education Inc.

Chen, M. 2019. The impact of expatriates' cross-cultural adjustment on work stress and job involvement in the high-tech industry. *Frontiers of Psychology*, 10: 2228. [Online]. DOI: [10.3389/fpsyg.2019.02228](https://doi.org/10.3389/fpsyg.2019.02228) [Accessed 21 June 2023].

Collings, D.G. 2014. Integrating global mobility and global talent management: exploring the challenges and strategic opportunities. *Journal of World Business*, 49(2): 253-261. [Online]. DOI: [10.1016/j.jwb.2013.11.009](https://doi.org/10.1016/j.jwb.2013.11.009) [Accessed 08 March 2023].

Collings, D.G., Dowling, P.J. and Scullion, H. 2006. Global staffing: A review and thematic research agenda. *The International Journal of Human Resource Management*, 20(6): 1253-1272. [Online]. DOI: [10.1080/09585190902909806](https://doi.org/10.1080/09585190902909806) [Accessed 08 March 2023].

Collings, D.G., Morley, M.J. and Scullion, H. 2007. Changing patterns of global staffing in the multinational enterprise: Challenges to the conventional expatriate assignment and emerging alternatives. *Journal of World Business*, 42(2): 198-213. [Online]. DOI: [10.1016/j.jwb.2007.02.005](https://doi.org/10.1016/j.jwb.2007.02.005) [Accessed 08 March 2023].

Collings, D.G., Scullion, H. and Morley, Dowling, P.J. 2009. Global staffing: a review and thematic research agenda. *The International Journal of Human Resource Management*, 20(6): 1253-1272. [Online]. DOI: [10.1080/09585190902909806](https://doi.org/10.1080/09585190902909806) [Accessed 08 March 2023].

Davis, C. 2021. The aims of the research. In: du-Plooy-Cilliers, F., Davis, C. and Bezuidenhout, R.M. eds. 2021. *Research matters*. Claremont: Juta, Chapter 5: 81-92. [Online]. Available on EBSCOhost at: <https://ezproxy.iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=nlebk&AN=746917&site=ehostlive&scope=site> [Accessed 17 March 2023].

Dousin, O. and Sulong, R.S. 2021. "Stepping out of the ordinary": exploring cross-cultural challenges of expatriates in the Kingdom of Saudi Arabia. *Rajagiri Management Journal*, 16(2): 131-143. [Online]. DOI: [10.1108/RAMJ-01-2021-0004](https://doi.org/10.1108/RAMJ-01-2021-0004) [Accessed 21 June 2023].

Du-Plooy-Cilliers, F. 2021. Research paradigms and traditions. In: du-Plooy-Cilliers, F., Davis, C. and Bezuidenhout, R.M. eds. 2021. *Research matters*. Claremont: Juta, Chapter 2: 21-43. [Online]. Available on EBSCOhost at: <https://ezproxy.iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=nlebk&AN=746917&site=ehost-live&scope=site> [Accessed 17 March 2023].

Ercan, S. and McAbee, S.T. 2013. The big five traits and expatriate adjustment: A meta-analytic review. *The 28th annual meeting of the Society of Industrial and Organizational Psychology Conference*. 11-13 April 2013. Houston. [Online]. Available at: [https://www.researchgate.net/publication/275038127\\_The\\_Big\\_Five\\_Traits\\_-\\_and\\_Expatriate\\_Adjustment\\_A\\_Meta-Analytic\\_Review](https://www.researchgate.net/publication/275038127_The_Big_Five_Traits_-_and_Expatriate_Adjustment_A_Meta-Analytic_Review) [Accessed 11 March 2023].

Haile, S. and White, D. 2019. Expatriate failure is a common challenge for multinational corporations: Turn expatriate failure to expatriate success, *International Journal of Business & Public Administration*, 16(1): 27-40. [Online]. Available on EBSCOhost at: <https://ezproxy.iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=bsu&AN=137740395&site=ehost-live&scope=site> [Accessed 21 June 2023].

Hall, E.T. 1976. *Beyond culture*. Anchor.

Harrison, D. A., Shaffer, M. A., & Bhaskar-Shrinivas, P. 2004. Going places: Roads more and less travelled in research on expatriate experiences. *Research in Personnel and Human Resources Management*, 23: 199-247. [Online]. DOI: [10.1016/S0742-7301\(04\)23005-5](https://doi.org/10.1016/S0742-7301(04)23005-5) [Accessed 08 March 2023].

Harry, T.T., Chinyamurindi, W.T. and Dodd, N. 2019. Telling tales: Using narratives and story-telling to understand the challenges faced by a sample of self-initiated expatriates in South Africa. *Journal of Global Mobility: The Home of Expatriate Management Research*, 7(1): 64-87. [Online]. DOI: [10.1108/JGM-05-2018-0024](https://doi.org/10.1108/JGM-05-2018-0024) [Accessed 01 March 2023].

Harzing, A. and Pudelko, M. 2013. Language competencies, policies and practices in

multinational corporations: a comprehensive review and comparison of Anglophone, Asian, Continental European and Nordic MNCs. *Journal of World Business*, 48(1): 87-97. [Online]. DOI: [10.1016/j.jwb.2012.06.011](https://doi.org/10.1016/j.jwb.2012.06.011) [Accessed 01 March 2023].

Haslberger, A. and Brewster, C. 2007. Domains of expatriate adjustment with special emphasis on work. *VI International Workshop on Human Resource Management*. 17-18 May 2007. Cadiz. [Online]. Available at: <https://citeseerx.ist.psu.edu/document?repid=rep1&type=pdf&doi=1fdb50bafd2ef-b9b3d32cac894076e96b901cb01> [Accessed 11 March 2023].

Herselman, M. and van Greunen, D. 2010. Global survey on culture differences and context in using e-government systems: A pilot study. In: Popescu-Zeletin, R., Rai, I.A., Jonas, K., Villafiorita, A. eds. 2011. *E-infrastructures and e-services for developing countries*. Springer: Berlin, Heidelberg. [Online]. DOI: [10.1007/978-3-642-23828-4\\_6](https://doi.org/10.1007/978-3-642-23828-4_6) [Accessed 28 June 2023].

Herzog, C., Hitters, E. and Handke, C. 2019. Analyzing talk and text II: Thematic analysis. In: Van Den Bulck, H. Puppis, M., Donders, K and Van Audenhove, L. eds. 2019. *The Palgrave handbook of methods for media policy research*. Cham: Springer International Publishing, Chapter 22: 385-481. [Online]. DOI: [10.1007/978-3-030-16065-4\\_22](https://doi.org/10.1007/978-3-030-16065-4_22) [Accessed 19 July 2023].

Hilldrup. 2015. *2015 Talent management – Trends review*. [Online]. Available at: [https://www.hilldrup.com/wp-content/uploads/2016/08/TrendsReport\\_2015.pdf](https://www.hilldrup.com/wp-content/uploads/2016/08/TrendsReport_2015.pdf) [Accessed 11 March 2023].

Ho, L. and Limpaecher, A. 2023. Content analysis vs thematic analysis: What's the difference?, *Delve*, 15 February 2023. [Blog]. Available at: <https://delvetool.com/blog/content-analysis-vs-thematic-analysis> [Accessed 23 August 2023].

Hofstede, G. 1980. *Culture's consequences: International differences in work-related values*. Beverly Hills, CA: Sage.

Hofstede, G., Hofstede, G.J. and Minkov, M. 2010. *Cultures and organizations: Software of the mind: Intercultural cooperation and its importance for survival*. McGraw-Hill: New York. [ebook]. Available at: [https://e-edu.nbu.bg/pluginfile.php/900222/mod\\_resource/content/1/G.Hofstede\\_G.J.Hofstede\\_M.Minkov%20-%20Cultures%20and%20Organizations%20-%20Software%20-of%20the%20Mind%203rd\\_edition%202010.pdf](https://e-edu.nbu.bg/pluginfile.php/900222/mod_resource/content/1/G.Hofstede_G.J.Hofstede_M.Minkov%20-%20Cultures%20and%20Organizations%20-%20Software%20-of%20the%20Mind%203rd_edition%202010.pdf) [Accessed 28 June 2023].

Hofstede Insights. 2023a. Country comparison tool, 2023. [Online]. Available at: <https://www.hofstede-insights.com/country-comparison-tool?countries=south+africa> [Accessed 28 June 2023].

Hofstede Insights. 2023b. Country comparison tool, 2023. [Online]. Available at: <https://www.hofstede-insights.com/country-comparison-tool?countries=germany%2Csouth+africa> [Accessed 28 June 2023].

Hrubenja, A. 2022. Number of expats by country: An overview, 19 November 2022. [Online]. Available at: <https://moneytransfers.com/news/2022/10/19/number-of-expats-by-country> [Accessed 17 March 2023].

Iacob, D. and Dumitrescu, V.M. 2012. Cultural awareness, sensitivity and competence: Basic requirements for business success in Nepal and South Africa, *Synergy Journal*, 8(2): 121-134. [Online]. Available at: <https://synergy.ase.ro/issues/2012-vol8-no2/08-daniel-iacob-virginia-mihaeladumit-rescu-cultural-awareness-sensitivity-and-competence-basic-requirements-forbusiness-success-in-nepal-and-south-africa.pdf> [Accessed 28 June 2023].

Jassawalla, A., Truglia, C. and Garvey, J. 2004. Cross-cultural conflict and expatriate manager adjustment: An exploratory study. *Management Decision*, 42(7): 837-849. [Online]. DOI: [10.1108/00251740410550916](https://doi.org/10.1108/00251740410550916) [Accessed 22 February 2023].

Khumalo, P.M. and Zondo, R.W.D. 2021. Perceptions of the influence of cultural diversity on business performance in the automotive component manufac-

turing in South Africa. *South African Journal of Human Resource Management*, 19(1): 1-7. [Online]. DOI: [10.4102/sajhrm.v19i0.1451](https://doi.org/10.4102/sajhrm.v19i0.1451) [Accessed 22 February 2023].

Kirlidog, M., van der Vyver, C., Zeeman, M. and Coetzee, W. 2018. Unfulfilled need: reasons for insufficient ICT skills in South Africa. *Information Development*, 34(1): 5-19. [Online]. DOI: [10.1177/0266666916671984](https://doi.org/10.1177/0266666916671984) [Accessed 23 January 2024].

Koonin, M. 2021. Validity and reliability. In: du-Plooy-Cilliers, F., Davis, C. and Bezuidenhout, R.M. eds. 2021. *Research matters*. Claremont: Juta, Chapter 17: 287-299. [Online]. Available on EBSCOhost at: <https://ezproxy.iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=nlebk&AN=746917&site=ehostlive&scope=site> [Accessed 17 March 2023].

Leedy, P.D. and Ormrod, J.E. 2015. *Practical research: Planning and design*. 11<sup>th</sup> edition. Essex: Pearson.

Lester, J.N., Cho, Y. and Lochmiller, C.R. 2020. Learning to do qualitative data analysis: A starting point. *Human Resource Development Review*, 19(1): 94-106. [Online]. DOI: [10.1177/1534484320903890](https://doi.org/10.1177/1534484320903890) [Accessed 16 August 2023].

Louw, M. 2021. Ethics in research. In: du-Plooy-Cilliers, F., Davis, C. and Bezuidenhout, R.M. eds. 2021. *Research matters*. Claremont: Juta, Chapter 18: 300-312. [Online]. Available on EBSCOhost at: <https://ezproxy.iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=nlebk&AN=746917&site=ehost-live&scope=site> [Accessed 27 March 2023].

Luthans, F. and Doh, J.P. 2012. *International management: Culture, strategy, and behavior*. 8<sup>th</sup> ed. New York: McGraw-Hill.

Matharu, G.K., von der Heide, T., Sorwar, G. and Sivapalan, A. 2023. The moderating role of Hofstede's cultural dimensions on consumer purchasing of organic food.

*Journal of International Consumer Marketing*, [Online]. DOI: [10.1080/08961530.2023.2176396](https://doi.org/10.1080/08961530.2023.2176396) [Accessed 16 August 2023].

Mellahi, K. and Collings, D.G. 2010. The barriers to effective global talent management: The example of corporate élites in MNEs. *Journal of World Business*, 45(2): 143-149. [Online]. DOI: [10.1016/j.jwb.2009.09.018](https://doi.org/10.1016/j.jwb.2009.09.018) [Accessed 08 March 2023].

Miessler, D. 2020. The difference between deductive and inductive reasoning, 23 September 2020. [Online]. Available at: <https://danielmiessler.com/blog/the-difference-between-deductive-and-inductive-reasoning/> [Accessed 17 March 2023].

Michie, J. 2019. *The handbook of globalisation*. Cheltenham: Edward Elgar Publishing Limited. [eBook]. Available on Google at: [https://books.google.co.za/books?hl=en&lr=&id=yC6UDwAAQBAJ&oi=fnd&pg=-PR1&dq=globalisation&ots=bCr4hxFFP&sig=WFzY8g0k9xjcP9L4yJQuzJUVSY&-redir\\_esc=y#v=onepage&q=globalisation&f=false](https://books.google.co.za/books?hl=en&lr=&id=yC6UDwAAQBAJ&oi=fnd&pg=-PR1&dq=globalisation&ots=bCr4hxFFP&sig=WFzY8g0k9xjcP9L4yJQuzJUVSY&-redir_esc=y#v=onepage&q=globalisation&f=false) [Accessed 02 April 2023].

Misa, K.L. and Fabriacatore, J.M. 1979. Return on investments of overseas personnel. *Financial Executive*, 47(4): 42-46. Cited in: Haile, S. and White, D. 2019. Expatriate failure is a common challenge for multinational corporations: Turn expatriate failure to expatriate success, *International Journal of Business & Public Administration*, 16(1): 27-40. [Online]. Available on EBSCOhost at: <https://ezproxy.-iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=bs-u&AN=137740395&site=ehost-live&scope=site> [Accessed 21 June 2023].

Orpen, C. 2003. Teaching students to manage cross culturally. *Cross Cultural Management*, 10(3): 80-86. [Online]. DOI: [10.1108/13527600310797658](https://doi.org/10.1108/13527600310797658) [Accessed 08 March 2023].

Ozdemir, R.B. and Cozel, B. 2007. International hotel manager as an emerging concept: A review of expatriate management literature and a model proposal. *Journal of Hospitality and Tourism Management*, 14(2): 170-187. [Online]. DOI: [10.1375/jhtm.14.2.170](https://doi.org/10.1375/jhtm.14.2.170) [Accessed 22 February 2023].

Pascoe, G. 2021. Sampling. In: du-Plooy-Cilliers, F., Davis, C. and Bezuidenhout, R.M. eds. 2021. *Research matters*. Claremont: Juta, Chapter 11: 145-165. [Online]. Available on EBSCOhost at: <https://ezproxy.iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=nlebk&AN=746917&site=ehost-live&scope=site> [Accessed 17 March 2023].

Peng, M.W. 2018. *Global business*. Boston, MA: Cengage. Cited in: Haile, S. and White, D. 2019. Expatriate failure is a common challenge for multinational corporations: Turn expatriate failure to expatriate success, *International Journal of Business & Public Administration*, 16(1): 27-40. [Online]. Available on EBSCOhost at: <https://ezproxy.iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=bsu&AN=137740395&site=ehost-live&scope=site> [Accessed 21 June 2023].

Przytula, S. 2018. Global talent management in the context of expatriation. *Human Resource Management / Zarzadzanie Zasobami Ludzkimi*, 125(6): 29-49. [Online]. Available at: <https://ezproxy.iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=bsu&AN=136432803&site=ehost-live&scope=site> [Accessed 22 February 2023].

Ren, S., Chadee, D. and Presbitero, A. 2020. Influence of informal relationships on expatriate career performance in China: The moderating role of cultural intelligence. *Management and Organization Review*, 16(3): 1-25. [Online]. DOI: [10.1017/mor.2020.16](https://doi.org/10.1017/mor.2020.16) [Accessed 21 June 2023].

Ridgway, M. 2023. International assignment. In: Johnstone, S., Rodriguez, J.K. and Wilkinson, A. eds. 2023. *Encyclopedia of human resource management*. Cheltenham: Edward Elgar Publishing Limited, 203-205. [Online]. DOI: [10.4337/9781800378841.I.17](https://doi.org/10.4337/9781800378841.I.17) [Accessed 23 January 2024].

Saunders, M., Lewis, P. and Thornhill, A. 2019. *Research methods for business students*. 6<sup>th</sup> ed. Essex: Pearson. [eBook]. Available at: <https://gibsoncollege.edu.et/wp->

<content/uploads/2022/01/Research-Methods-forBusiness-Students-by-Mark-Saunders-Philip-Lewis-Adrian-Thornhill-z-lib.org-1.pdf> [Accessed 02 April 2023].

Schmitz, A., Toh, S.M. and Xiang, X. 2022. The host-country national perspective in the expatriate management process. In: Toh, S.M. and DeNisi, A. eds. 2019. *Expatriates and managing global mobility*. New York: Routledge, Chapter 8: 172-206.

Schuler, R.S., Tarique, I. and Jackson, S.E. 2011. Global talent management and global talent challenges: Strategic opportunities for IHRM. *Journal of World Business*, 46(4): 506-516. [Online]. DOI: [10.1016/j.jwb.2010.10.011](https://doi.org/10.1016/j.jwb.2010.10.011) [Accessed 19 February 2023].

Shaffer, M.A., Kraimer, M.L., Chen, Y and Bolino, M.C. 2012. Choices, challenges, and career consequences of global work experiences: A review and future agenda. *Journal of Management*, 38(4): 1282-1327. [Online]. DOI: [10.1177/0149206312441834](https://doi.org/10.1177/0149206312441834) [Accessed 08 March 2023].

Sharjeel, M.Y., Haider, S. and Aslam, M. 2021. Pragmatic perspectives of Hofstede's organizational dimensions in the context of ICT-based culture: Evidence from public universities in Pakistan. *International Journal of Distance Education and E- Learning*, 6(1): 130-148. [Online]. DOI: [10.36261/ijdeel.v6i1.1426](https://doi.org/10.36261/ijdeel.v6i1.1426) [Accessed 23 August 2023].

Stahl, G.K. 2017. Between ethnocentrism and assimilation: An exploratory study of the challenges and coping strategies of expatriate managers. *Academy of Management Proceedings*, 2000(1): E1-E2. [Online]. DOI: [10.5465/apb.2000.5535057](https://doi.org/10.5465/apb.2000.5535057) [Accessed 08 March 2023].

Standard Bank. 2023. South Africa: Investing in South Africa, 2023. [Online]. Available at: <https://www.tradeclub.standardbank.com/portal/en/market-potential/south-africa/investment> [Accessed 28 June 2023].

Sterle, M.F., Fontaine, J.R.J., de Mol, J. and Verhofstadt, L.L. 2018. Expatriate family adjustment: An overview of empirical evidence on challenges and resources.

*Frontiers in Philosophy*, 9: 1207. [Online]. DOI: [10.3389/fpsyg.2018.01207](https://doi.org/10.3389/fpsyg.2018.01207) [Accessed 21 June 2023].

Tahir, R. and Egleston, D.O. 2019. Expatriation management process: The challenges and impediments for the Western expatriates in the United Arab Emirate. *Journal of Workplace Learning*, 31(8): 520-536. [Online]. DOI: [10.1108/JWL-03-2019-0036](https://doi.org/10.1108/JWL-03-2019-0036) [Accessed 08 March 2023].

Tahir, R. and Ertek, G. 2018. Cross-cultural training: A crucial approach to improve success of expatriate assignment in the United Arab Emirates. *Middle East Journal of Management*, 5(1): 50-74. [Online]. DOI: [10.1504/MEJM.2018.088735](https://doi.org/10.1504/MEJM.2018.088735) [Accessed 08 March 2023].

Tahir, R. 2018. Expanding horizons and expatriate adjustment - Perception of Western expatriate managers in multinational companies in the United Arab Emirate. *Cross Cultural & Strategic Management*, 25(3): 401-424. [Online]. DOI: [10.1108/ccsm](https://doi.org/10.1108/ccsm) [Accessed 22 February 2023].

Takeuchi, R. 2010. A critical review of expatriate adjustment research through a multiple stakeholder view: Progress, emerging trends, and prospects. *Journal of Management*, 36(4): 1040-1064. [Online]. DOI: [10.1177/0149206309349308](https://doi.org/10.1177/0149206309349308) [Accessed 11 March 2023].

Tarique, I. and Schuler, R.S. 2018. A multi-level framework for understanding global talent management systems for high talent expatriates within and across subsidiaries of MNEs: Propositions for further research. *Journal of Global Mobility: The Home of Expatriate Management Research*, 6(1): 79-101. [Online]. DOI: [10.1108/JGM-07-2017-0026](https://doi.org/10.1108/JGM-07-2017-0026) [Accessed 17 February 2023].

Tarique, I. and Schuler, R.S. 2010. Global talent management: Literature review, integrative framework, and suggestions for further research. *Journal of World Business*, 45(2): 122-133. [Online]. DOI: [10.1016/j.jwb.2009.09.019](https://doi.org/10.1016/j.jwb.2009.09.019) [Accessed 08 March 2023].

Tung, R.L. 1982. Selection and training procedures of U.S., European, and Japanese Multinationals. *California Management Review*, 25(1): 57-81. [Online]. DOI: [10.2307/41164993](https://doi.org/10.2307/41164993) [Accessed 08 March 2023].

Vaiman, V., Haslberger, A. and Vance, C.M. 2015. Recognizing the important role of self-initiated expatriates in effective global talent management. *Human Resource Management Review*, 25(3): 280-286. [Online]. DOI: [10.1016/j.hrmr.2015.04.004](https://doi.org/10.1016/j.hrmr.2015.04.004) [Accessed 08 March 2023].

Van Everdingen, Y.M and Waarts, E. 2003. *A multi-country study of the adoption of ERP systems*. Rotterdam: Erasmus University Press. [Online]. Available at: [https://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=411652](https://papers.ssrn.com/sol3/papers.cfm?abstract_id=411652) [Accessed 28 June 2023].

Waxin, M.F. 2018. Expatriates' interaction adjustment: the direct and moderator effects of culture of origin. *International Journal of Intercultural Relations*, 28(1): 61-79. [Online]. DOI: [10.1016/j.ijintrel.2003.12.006](https://doi.org/10.1016/j.ijintrel.2003.12.006) [Accessed 08 March 2023].

Wilczewski, M, Soderberg, A. and Gut, A. 2019. Storytelling and cultural learning: An expatriate manager's narratives of collaboration challenges in a multicultural business setting. *Learning, Culture and Social Interaction*, 21: 362-377. [Online]. DOI: [10.1016/j.lcsi.2019.04.007](https://doi.org/10.1016/j.lcsi.2019.04.007) Accessed 28 June 2023].

Yari, N., Lankut, E., Alon, I. and Richter, N.F. 2020. Cultural intelligence, global mindset, and crosscultural competencies: a systematic review using bibliometric methods. *European Journal of International Management*, 14(2): 210-250. [Online]. DOI: [10.1504/EJIM.2020.105567](https://doi.org/10.1504/EJIM.2020.105567) [Accessed 28 September 2023].

Yeaton, K. and Hall, N. 2008. Expatriates: Reducing the failure rates. *Journal of Corporate Accounting and Finance*, 19(3): 75-78. Cited in: Haile, S. and White, D. 2019. Expatriate failure is a common challenge for multinational corporations: Turn expatriate failure to expatriate success, *International Journal of Business & Public Administration*, 16(1): 27-40. [Online]. Available on EBSCOhost at:

<https://ezproxy.iielearn.ac.za/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=bsu&AN=137740395&site=ehost-live&scope=site> [Accessed 21 June 2023].

## **ANNEXURE A: SAMPLE OF MEASUREMENT INSTRUMENT**

Introductory questions about the professional background:

1. What is your current position in your company?
2. How long have you been working for your current company?
3. How long have you been on your international assignment now?
4. What is your country of origin?
5. Is this your first international assignment?

Main questions:

6. Can you please describe how your company has recruited and selected you for your international assignment?
7. Which challenges did you experience during the selection and recruitment of your current position?
8. Can you please describe how your company has prepared you for your international assignment? (eg, training, physical examination, preparation of family members, etc)
9. Which challenges did you experience during the preparation of your current assignment?
10. Do you think your company has prepared you sufficiently?
11. Which challenges did you experience while being on your international assignment in South Africa:
  - a. Regarding your position, tasks and responsibilities?
  - b. Regarding interaction and communication with host-country nationals?
  - c. Regarding general adjustment (eg, food, living conditions, weather, family support, etc)?
12. Do you know what the repatriation process looks like in your company?
13. If so, can you please describe it?
14. Which challenges do you expect to experience regarding your repatriation?

## ANNEXURE B: SAMPLE OF INFORMED CONSENT FORM

Annexure H(a) – Participant or Respondent Consent Form

IIE007 Annexure 2022



### Annexure H(a)– PARTICIPANT OR RESPONDENT CONSENT FORM

#### Explanatory information sheet and consent form for participants

To whom it may concern,

My name is Lena Hemker and I am a student at The IIE MSA. I am currently conducting research under the supervision of Dr. Conrad van Greunen about the challenges expatriate managers experience relating to the multinational corporation's expatriate management process during and after their international assignment in South Africa. I hope that this research will enhance our understanding of the perspective of expatriates when it comes to the challenges they experience during their international assignment in countries other than Japan, China and Western countries in general.

I would like to invite you to participate in my study. In order to explain to you what your participation in my study will involve, I have formulated questions that I will try to fully answer so that you can make an informed decision. If you have any additional questions that you feel are not addressed or explained in this information sheet, please do not hesitate to ask me. Once you have read all the information contained in this sheet and are willing to participate, please complete and sign the consent form below.

The reference number of the permission letter of my ethical clearance is: M.42063

#### What will I be doing if I participate in your study?

I would like to invite you to participate in this research because you can provide valuable insights into the challenges you have experienced regarding your international assignment in South Africa, which has been identified as a research gap. If you decide to participate in this research, I would like to conduct an interview with you that will take approximately 30-45 minutes. I will ask a few introductory questions, followed by questions about the challenges you have experienced during the different stages of your international assignment (recruitment and selection, pre-departure preparation, adaptation in the host country and repatriation). Since you are most likely to still be on your international assignment, the question for the last stage will be about the challenges you expect to experience. You do not need to prepare for the interview, as it will be more of a casual conversation about your experiences.

If you decide to participate, you can still choose to withdraw at any time or decide not to answer particular interview questions.

#### Are there any risks/ or discomforts involved in participating in this study?

Whether or not you decide to participate in this research, there will be no negative impact on you. There are no direct risks or benefits to you if you participate in this study. You might, however, indirectly find that it is helpful to talk about your experiences during your international assignment in South Africa. If you find at any stage that you are not comfortable with the line of questioning, you may withdraw or refrain from participating.

The data collected during this interview will be used for research purposes only. Since the confidentiality of the data and your identity will be guaranteed, there is no major risk of participation for you.

The data collected will not be used punitively in any way.

Before contacting you, I obtained permission from the organisation you work for to contact you for a possible interview.

#### Do I have to participate in the study?

- Your inclusion in this study is completely voluntary.
- If you do not wish to participate in this study, you have every right not to do so.
- Even if you agree to participate in this study, you may withdraw at any time without having to provide an explanation for your decision.
- You may also refuse to answer any questions.

**Will my identity be protected?**

I promise to protect your identity. I will not use your name in any research summaries to come out of this research and I will also make sure that any other details are disguised so that nobody will be able to identify you or the company you work for. I would like to ask your permission to record the interviews, but only my supervisor and I will have access to these recordings. Nobody else, including anybody at IIE MSA, will have access to your interview information. I would like to use quotes when I discuss the findings of the research, but I will not use any recognisable information in these quotes that can be linked to you.

**What will happen to the information that participants provide?**

Once I have finished all interviews, I will write summaries to be included in my research report, which is a requirement to complete my Master of International Business degree. You may ask me to send you a summary of the research if you are interested in the final outcome of the study.

**What happens if I have more questions about the study?**

Please feel free to contact me or my supervisor should you have any questions or concerns about this research, or if there is anything you need to know before you decide whether to participate.

You should not agree to participate unless you are completely comfortable with the procedures followed.

My contact details are as follows:

Lena Hemker



The contact details of my supervisor are as follows:

Dr. Conrad van Greunen


**Participant or respondent consent**

I, \_\_\_\_\_, agree to participate in the research conducted by Lena Hemker about the challenges expatriate managers experience relating to the expatriate management process during and after their international assignment in South Africa.

This research has been explained to me and I understand what participation in this research will involve. I understand that:

- I agree to be interviewed for this research.
- My confidentiality will be ensured. My name and personal details will be kept private.
- My participation in this research is voluntary and I have the right to withdraw from the research at any time. There will be no repercussions should I choose to withdraw from the research.
- I may choose not to answer any of the questions that are asked during the research interview.
- I may be quoted directly when the research is published, but my identity will be protected.

Signature

Date

## ANNEXURE C: SAMPLE OF AUDIO OR VIDEO RECORDING FORM



### ANNEXURE H(b) - AUDIO OR VIDEO RECORDING CONSENT FORM (IIE007)

| Consent form for participants                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |             |  |  |                  |             |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|--|--|------------------|-------------|
| <p>I, _____, agree to allow Lena Hemker to audio record (face-to-face interview) or video record (online interview) my interview as part of the research about challenges expatriate managers experience relating to the expatriate management process during and after their international assignment in South Africa.</p> <p>This research has been explained to me and I understand what participation in this research will involve. I understand that:</p> <ul style="list-style-type: none"> <li>• My confidentiality will be ensured. My name, personal details or any other identifiable information will be kept confidential;</li> <li>• The recordings will be stored in a password-protected file on the researcher's computer; and</li> <li>• Only the researcher and the researcher's supervisor will have access to these recordings.</li> </ul> |             |  |  |                  |             |
| <table border="1" style="width: 100%;"> <tr> <td style="height: 40px;"></td> <td style="height: 40px;"></td> </tr> <tr> <td><b>Signature</b></td> <td><b>Date</b></td> </tr> </table>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |             |  |  | <b>Signature</b> | <b>Date</b> |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |             |  |  |                  |             |
| <b>Signature</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>Date</b> |  |  |                  |             |

## ANNEXURE D: SAMPLE OF GATEKEEPER'S LETTER

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| <div>+</div> <b>Consent form to conduct research at company/organisation/association</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                          |
| <p>I, [INSERT FULL FIRST AND LAST NAMES OF REPRESENTATIVE], in my capacity as [INSERT FULL TITLE/DESIGNATION] of [INSERT COMPANY/ORGANISATION/ASSOCIATION NAME], grant permission to Lena Hemker to conduct research at the at the expatriate managers of our organisation in South Africa pending the outcome of the ethics committee of the IIE on the envisaged research. The student may only engage with members of the organisation/ company/ association if they can produce the Ethics Letter from the IIE.</p> <p>This research has been explained to me and I understand what participation in this research will involve for the people I represent. I also reserve the right to remind the people I represent that their participation in this study is completely voluntary and that this permission does not imply their participation. I reserve the right to withdraw this permission at any time.</p> <p>I also understand that research reports are made available in IIE Libraries as well as on the IIE Repository. The below conditions must be applied whilst writing up the research report:</p> |                          |
| <b>Conditions concerning the anonymity of the company/organisation/association:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                          |
| The company/organisation/association must be kept <u>anonymous</u> in the research report.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <input type="checkbox"/> |
| The company/organisation/association may be <u>identified</u> in the research report.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <input type="checkbox"/> |
| <b>Conditions concerning the publication of the research report:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                          |
| The research report will be made available on the IIE Repository...                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                          |
| <u>Immediately</u> after completion.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <input type="checkbox"/> |
| <u>After</u> a specified number of months has elapsed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <input type="checkbox"/> |
| Number of months, if selected:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                          |
| <div></div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                          |
| <b>Signature</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>Date</b>              |

## ANNEXURE E: ETHICAL CLEARANCE LETTER



Our Ref: M.420623  
Enquiries: [research@iie.ac.za](mailto:research@iie.ac.za)

23 June 2023

### Outcome of Ethics Clearance Application for Master of International Business

Student Name: Lena Hemker  
Student number: [REDACTED]  
Brand and campus: IIEMSA

Dear Lena

Thank you for submitting the ethics clearance application for the study:  
**Exploration of challenges in expatriate management of multinational corporations in South Africa – an expatriate perspective.**

We are pleased to inform you that the IIE's Higher Degrees Committee considered and granted ethics clearance. This means that you may proceed with data collection. If you are collecting data from a specific organisation, ensure that you have a gatekeeper's letter that confirms their approval of the data collection being done.

You are reminded that any changes made to the research methodology or title of the research study must be signed off by the IIE's Higher Degrees Committee. Kindly ensure that all ethical considerations are duly applied whilst collecting, analysing and interpreting the data for the completion of your research.

If you have any questions, please feel free to contact your programme team or supervisor directly.

All the best with your research.



Dr WH Engelbrecht  
Chair: Higher Degrees Committee

**ADvTECH House:** Inanda Greens, 54 Wierda Rd West, Wierda Valley 2196  
P.O. Box 2369, Randburg 2125  
**Directors:** RJ Douglas (UK), JDR Oesch, MD Aitken, SCD Lurie  
**Group Company Secretary:** CB Crouse



The Independent Institute of Education (Pty) Ltd is registered with the Department of Higher Education and Training as a private education institution under the Higher Education Act, 1997 (reg. no. 2007/HE07/002). Company registration number: 1987/004754/07.

## ANNEXURE F: COMPLETE TABLE OF THEMES, CATEGORIES AND CODES

### Stage 1: Recruitment and selection

| Phases of the expatriate management process | Interview questions                                                                                                                                                                         | Raw data quotations                                                                                                                                                                                                                                                                                                                                                                                     | Codes                                                                                             | Categories                                                 | Themes                                                                           | Link to research objectives (RO) / questions (RQ)                                                                                                                                                                                                                                            |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|------------------------------------------------------------|----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Recruitment and selection                   | Can you please describe how your company has recruited and selected you for your international assignment?                                                                                  | "And I think this is somewhere where companies have to understand that it makes no sense for me to force someone to a delegation or kind of make it a must thing for senior roles or whatever. [...] but if the person does not enjoy it and is not open to it, then it's a lost time for all involved parties and no one profits. [...] So I think they must get the feeling that you are interested." | Compulsory international assignments for future leaders without emphasis on essential soft skills | 1.1 Ignoring soft skills during selection                  | Challenges experienced during recruitment and selection for the current position | RO1: To identify and empirically investigate the challenges that expatriate managers experienced during their selection and recruitment.<br><br>RQ1: What are the challenges that expatriate managers experienced during their recruitment and selection for their international assignment? |
|                                             |                                                                                                                                                                                             | "you have to fill a lot of papers of course with the information that they anyhow already have. That is the first challenge, because it is repeating again and again and again these things."                                                                                                                                                                                                           | Repetitive tasks                                                                                  | 1.2 Poor internal communication                            |                                                                                  |                                                                                                                                                                                                                                                                                              |
|                                             |                                                                                                                                                                                             | "And you don't really know what's happening after"                                                                                                                                                                                                                                                                                                                                                      | Lack of transparency during selection process                                                     | 1.3 Uncertainty due to company processes and circumstances |                                                                                  |                                                                                                                                                                                                                                                                                              |
|                                             |                                                                                                                                                                                             | "It's always a kind of uncertainty – will it really happen or is something popping up that stops the company to select you"                                                                                                                                                                                                                                                                             | Uncertainty regarding company's selection decision                                                |                                                            |                                                                                  |                                                                                                                                                                                                                                                                                              |
|                                             | Which challenges did you experience during the selection and recruitment of your current position?                                                                                          | "And then yes finally 2020, end of 2020 I was also contacted by headquarters' financial department. And they said yes we are creating this job and we would like you to apply"                                                                                                                                                                                                                          | Long internal process until decision has been made                                                | 1.4 Uncertainty due to external factors                    |                                                                                  |                                                                                                                                                                                                                                                                                              |
|                                             |                                                                                                                                                                                             | "I guess the biggest challenge is to wait and then and because it of course has more influence on you than just another job change and because you don't really know what's gonna happen with it."                                                                                                                                                                                                      | Possible changes due to family issues<br>COVID-related delays and uncertainties                   |                                                            |                                                                                  |                                                                                                                                                                                                                                                                                              |
|                                             |                                                                                                                                                                                             | "Maybe there are some family topics. It's always a kind of uncertainty."                                                                                                                                                                                                                                                                                                                                |                                                                                                   |                                                            |                                                                                  |                                                                                                                                                                                                                                                                                              |
|                                             | "The only issue, what usually we faced is this process started in the year 2020, the famous year for COVID, right. So all the processes, internal processes also got a little bit delayed." |                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                   |                                                            |                                                                                  |                                                                                                                                                                                                                                                                                              |

## Stage 2: Pre-departure preparation

| Phases of the expatriate management process | Interview questions                                                                                                                                                                                                                                               | Raw data quotations                                                                                                                                                                                                                                                                                                                                                                                    | Codes                                            | Categories                                                           | Themes                                                                         | Link to research objectives (RO) / questions (RQ)                                                                                                                                                                                                                                                          |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|----------------------------------------------------------------------|--------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Pre-departure preparation                   | <p>Can you please describe how your company has prepared you for your international assignment?</p> <p>Which challenges did you experience during the preparation of your current assignment?</p> <p>Do you think your company has prepared you sufficiently?</p> | "for me it was COVID. I think that was probably the biggest topic" "We selected the place to live in. I got my visa shortly after and basically at the time I got my visa and we knew which apartment we want to have, everything was cancelled because of COVID. We couldn't move. And this created a whole bunch of problems."                                                                       | COVID delaying the move for an indefinite period | 2.1 COVID-related uncertainties                                      | Challenges experienced during the preparation for the international assignment | <p>RO2: To identify and empirically investigate the challenges that expatriate managers experienced during their preparation for their international assignment.</p> <p>RQ2: What are the challenges that expatriate managers experienced during their preparation for their international assignment?</p> |
|                                             |                                                                                                                                                                                                                                                                   | "I didn't get the opportunity for you know information visit. Usually this happens in our company, however, because of the COVID travel restrictions, I didn't have the chance to move to South Africa and have a visit for information"                                                                                                                                                               | Moving to the unknown                            |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "I mean to find the right place to live is a challenge in South Africa, it's not so easy, because at that point of time the market was also quite tough, not so much houses on the market, so it took a while"                                                                                                                                                                                         | Tough housing market                             | 2.2 Unfamiliar living and working conditions                         |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "one surprise for me was I was had always a company car. And suddenly you have no company car anymore. And this was quite a challenge, because you need to be mobile."                                                                                                                                                                                                                                 | Different company benefits                       |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "if you're doing it for the first time and you're not fully aware of the processes. I think it is quite a challenge. The first international assignment was more challenging, especially in terms of organisation."                                                                                                                                                                                    | No understanding of overall process              |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "so they have a document that describes everything, but it's a long document and if you don't invest a lot of time to understand it, then you. There's policy after policy after policy and if you don't invest a lot of time and that's not supposed to be the core responsibility of the transferee."                                                                                                | No transparent communication of policies         | 2.3 Poor internal communication on process of expatriate management  |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "And then I realised it is very difficult for me as a single person with no, let's say credit history in South African banks to get a loan for a car. I was unable to buy a car."                                                                                                                                                                                                                      | Unexpected surprises                             |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "I think in this day and age doing an international assignment means that obviously one partner has to sacrifice something in the process. And I think if there was more support in preparation of the move to support dual careers, that would be very helpful."                                                                                                                                      | Lack of partner support                          |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "So basically the company takes very good care of the person who is being transferred for the international assignment, and completely neglects the partner. If they want to work, they are basically completely on their own. And even things like getting a work visa, getting guidance on what jobs are available, understanding the market situation in the new country, or completely neglected." | Lack of transparency on partner situation        | 2.4 Unclear situation for partner                                    |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "We had to eventually book our flights ourselves, we had to look for accommodation ourselves, and in fact afterwards when we had the information that they pick us up at the airport, there was no one to pick us up"                                                                                                                                                                                  | Need for self-initiative                         |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "I had to take the lead actually for most of the topics. I had to take the initiative to apply for my visa at that time"                                                                                                                                                                                                                                                                               |                                                  | 2.5 Dealing with administrative processes by showing self-initiative |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "So what I did I contacted a few institutions in the Netherlands at that time with the question that that yeah, I was going to move to South Africa, being responsible for a few African countries whether they would be able to offer me something. So that's also what I arranged for myself."                                                                                                       |                                                  |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "There was not so much preparation in that sense. Um, that, um in South Africa at that time the [company name]* entity was, as I said, was a relatively small HR department. They were not so experienced with getting expats in. They had, I think one or two expats at that time and it was, yeah, all dealt with individually. So they didn't have a proper process in place."                      | Lack of preparation                              |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "It was offered virtually and we thought it doesn't help us so we decided not to take it."                                                                                                                                                                                                                                                                                                             | Training not offered on correct platform         |                                                                      | 2.6 Training not adequately preparing for assignment                           |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "I think the cultural training would have helped probably before we come. So, the way it works is that you start the cultural training once you arrived and this cultural training in our case was arranged almost six or seven months after"                                                                                                                                                          | Training not timeless                            |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "So as the majority was from Mexico, everything was concentrated on topics which are very very typical in Mexico. Some of them, yes, it's the same over here, but it was – yeah so I was missing a little bit of Africa specifically."                                                                                                                                                                 | Training not context specific                    |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | "There was also an intercultural training. And this was in hindsight I would say it was good as a basic one, but definitely not in depth enough to understand all the dynamics which you just experience here."                                                                                                                                                                                        | Training not comprehensive enough                |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |
|                                             |                                                                                                                                                                                                                                                                   | I: Okay. Did you get a cultural training?<br>P7: No.                                                                                                                                                                                                                                                                                                                                                   | No cultural training                             |                                                                      |                                                                                |                                                                                                                                                                                                                                                                                                            |

| Phases of the expatriate management process | Interview questions | Raw data quotations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Codes                                                                                                                                                                                                                                                                                                                                                                                                    | Categories                        | Themes | Link to research objectives (RO) / questions (RQ) |
|---------------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|--------|---------------------------------------------------|
|                                             |                     | <p>"The visa topic is – you should not underestimate the process, especially for South Africa. Of course it always depends on your personal nationality. I'm a German passport holder, my wife for example is a Lithuanian passport holder, so that was a challenge"</p> <p>"it would be helpful that [company name deleted] or whoever is in charge for your move would give you clear guidance on what kind of documents are needed, original or copy, that would help a lot and would speed up the process."</p> <p>"So I had to find out everything myself from a few colleagues in South Africa, but also going to the South African embassy in The Hague in the Netherlands. [...] So I had to take care of that. Yeah, mainly myself."</p> <p>"we had to go there three times to hand over all the documents and then you wait. And you wait and you wait and you wait. That's a bit of a challenge, especially if you want to move, you want to start in your new position and you're still stuck in the visa process."</p> <p>"visa, here comes the challenge. I was supposed to start – yeah I was supposed to start in 2021. So but then everything was delayed, and at that time COVID and so on so we said beginning 2022 you will start. The visa application was already started and yeah it took months and months and months and then finally in May 2022 I got my visa and in June – end of June 2022 I started."</p> <p>"It's just a lengthy process"</p> <p>"So it took almost October 2021 till I got my visa in my hand and, yeah, so I December 2021, or November end of November 2021, I moved here."</p> <p>"So during this time and also there was a delay in getting - me getting the visa. So almost nine months."</p> <p>"And then going to the embassy, the South African embassy, that was a bit stressful, because we don't know are the documents complete or is anything missing?"</p> <p>"The visa was the biggest challenge to be honest, it was not clear yet will I get it, will I not get it. When will I get it? Where is it at the moment? Where is the bottleneck?"</p> <p>"That is something which is from a South African perspective quite easy to get. You can even get it online. When you do online banking, you can get stamped bank statements from the last three months, whatever. To get stamped bank statements here in the Netherlands, it is a challenge."</p> <p>"the company that does or was doing the visa which is by far the most difficult part of it they were not quite good."</p> <p>"[company name deleted] which was a company that helped said what we need, but they went a bit too extensive"</p> <p>"But so it's just a lot of documents that you have to get together."</p> | <p>Different nationalities influence visa opportunities</p> <p>No clear guidance in visa process</p> <p>Long process to obtain a visa</p> <p>Uncertainty if correct documents have been submitted</p> <p>Uncertainty regarding approval of visa</p> <p>Visa requirements being from host country perspective</p> <p>Inefficient 3rd party provider for visa</p> <p>Gathering all necessary documents</p> | 2.7 Difficulties obtaining a visa |        |                                                   |

### Stage 3: Expatriate adjustment

| Phases of the expatriate management process                                                                                                           | Interview questions |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Codes                                                               | Categories                                                      | Themes                                                                                                        | Link to research objectives (RO) / questions (RQ) |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|-----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| Which challenges did you experience while being on your international assignment in South Africa regarding your position, tasks and responsibilities? |                     | "I had to find out my own way and I had to, as I said, I was the first one in the role. So it was not that there was a job description."                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Not having a job description                                        | 3.1 Dealing with and working in the unknown                     | Challenges experienced regarding position, tasks and responsibilities while being on international assignment |                                                   |
|                                                                                                                                                       |                     | "I had no clue what I'm doing to be honest. I was not within that part of the business. So I didn't know most of the products and things they're doing. I was not doing sales or whatever before. I was not leading people before, so I didn't know - I really had no clue of my job."                                                                                                                                                                                                                                                                                                                         | Lack of prior knowledge and experience                              |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "Yes, as I mentioned, it's a completely new department altogether. So everything was new. [...] So we started the with the no base to be honest, so completely white field."                                                                                                                                                                                                                                                                                                                                                                                                                                   | Establishment of a new department from scratch                      |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "In South Africa we also went through riots in 2021, which was also a bit critical, when will it come to an end, will it come closer to Joburg. [...] That was a bit tricky, a tricky time."                                                                                                                                                                                                                                                                                                                                                                                                                   | Uncertainty and having to deal with tricky situations               | 3.2 Dealing with unexpected situations                          |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "Ja you come with a certain expectation, so you come also with a kind of expectation of the maturity level of the unit and the different departments. And then of course it's not reality, your expectation is not really a mural of the reality."                                                                                                                                                                                                                                                                                                                                                             | Discrepancy between expectations and reality                        |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "whereas in office sometimes there is a, umm, always a question mark whether my expectations are very high or I need to bring my expectations down or the colleagues um, how much I can push so that I can modify them, their approach, how you know, attitudes, willingness, competency."                                                                                                                                                                                                                                                                                                                     |                                                                     |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "So you see topics and problems that you did not expect"                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Lack of preparation for unexpected problems                         |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "It's very very human-related and you have to show empathy of course to understand what really happened"                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Dealing with emotional topics                                       |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "We just started to get to know each other, we just started to understand each other and then COVID hit us in South Africa and then everybody disappeared. Working from home. That was definitely not how to say healthy for our get to know."                                                                                                                                                                                                                                                                                                                                                                 | COVID-related disrupted relationships                               | 3.3 Distance disrupting relationships                           |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "I took over some of the responsibilities already in January, but virtually of course, which is extremely difficult from that distance. Especially if you don't know the people personally"                                                                                                                                                                                                                                                                                                                                                                                                                    | Difficulties to execute job without having met colleagues in person |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "So almost nine months. we work together but they have not physically seen me - only through teams right? So uh, when there is no acceptance, actually the driving and pushing the team and getting the - what you say - alignments will be tough."                                                                                                                                                                                                                                                                                                                                                            | Lack of physical presence affecting team dynamics                   |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "But I know possibilities are limited and so I'm afraid nobody at [company name]" knows what to do with me when I'm back"                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Not being connected to headquarters                                 |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "But it's quite difficult at the moment because with all the changes ongoing in the management at [company name]", hardly anybody knows me and also I don't know anybody from the management anymore."                                                                                                                                                                                                                                                                                                                                                                                                         | Not being picked up about changes in the headquarters               |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "you have to adapt to the local how to say culture of the organisation. This is something you cannot learn in advance, this is not something you can read about, so you just have to understand how the situation is set up and how the organisation works"                                                                                                                                                                                                                                                                                                                                                    | Adapting to different local organisational culture                  | 3.4 Working in a different organisational structure and culture |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "Because obviously moving to a new location, it's still the same company, but a lot of processes are based on local processes and were not familiar to me"                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Lack of familiarity with local processes                            |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "we have a matrix structure within [company name]". So where you have the regional organisation and you have the divisions who are responsible for their products and product lines and whatever and in Africa we have multiple divisions active. But my role is part of, yeah, the regional organisation. So I had a regional responsibility and I had to take care of, yeah, those divisional activities and the people working for those divisions in Africa. And sometimes they had different opinions on things, how they should be done"                                                                 | Balancing diverse requirements                                      |                                                                 |                                                                                                               |                                                   |
|                                                                                                                                                       |                     | "maybe more a challenge that came back to work that I probably forgot is that I come from a headquarter where the average education at least of the people I dealt with was quite high. People that can work with analysis, that can kind of work with different Microsoft programmes, that know how a Calendar works in Word like literally basic things. That overall can understand concepts when you explain it and so on. And this was not the case in the role I was in. The education there and it was also it's linked to the team I was in, but it was wat lower. This of course created a challenge" | Different level of education than in headquarters                   |                                                                 |                                                                                                               |                                                   |

| Phases of the expatriate management process | Interview questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                          | Codes                                                                                 | Categories                                                                                          | Themes                                                                                                                             | Link to research objectives (RO) / questions (RQ)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |  |  |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| Expatriate Adjustment                       | Which challenges did you experience while being on your international assignment in South Africa regarding interaction and communication with host-country nationals?                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | "I had to manoeuvre, I had to balance, I had to be careful that I was not stepping on the toes of the local HR manager in South Africa"                                                                                                                                                                                                                                                                                                  | Need to be sensitive towards colleagues                                               | 4.1 Navigating emotional communication in a sensitive culture                                       | Challenges experienced regarding interaction and communication with host-country nationals while being on international assignment | RO3: To identify and empirically investigate the challenges that expatriate managers experienced during their foreign assignment, especially with regard to adaptation in the following areas:<br>a. adjustment to work;<br>b. adjustment to interacting with host-country nationals;<br>and<br>c. adjustment to the general non-work environment.<br><br>RQ3: What are the challenges that expatriate managers experienced during their foreign assignment, especially about their adaptation in the following areas:<br>a. adjustment to work;<br>b. adjustment to interacting with host-country nationals;<br>c. adjustment to the general non-work environment. |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "You have to be careful on certain things. You might not wanna touch certain topics with different people."                                                                                                                                                                                                                                                                                                                              | Need to be careful with certain topics in discussions                                 |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "But I think this is probably my biggest risk that if I meet a politician, I wanna ask him about corruption, even though he's not involved himself. But I wanna ask him like, don't you see? Like, don't you see what's happening around you? But I would wanna ask it. And then it hurts me not being able to ask it. But I think you have to be more careful"                                                                          |                                                                                       |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "So it's a lot of feelings and that a lot of people who think that they left behind"                                                                                                                                                                                                                                                                                                                                                     | Locals being very emotional                                                           |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "Dutch are known as being quite direct and sometimes, yeah, that can be felt as blunt so that you really have to be aware on how you approach people and how you present yourself in meetings"                                                                                                                                                                                                                                           | Need to adjust one's own communication style                                          | 4.2 Dealing with cultural peculiarities                                                             |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "Um, I got irritated quite a bit of chasing people. Uh, getting things done. Um, in the beginning I remember I came home and I was complaining to my wife that South Africans are lazy and you have to kick them in the butt and to get things done and whatever. [...] sending an e-mail and expecting a feedback by certain date, people don't act on emails. People don't act on emails. You have to, you have to follow up on them." | Having to follow up on individuals                                                    |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "To this general thing of things just being slower. And for me, what was the most extreme thing is just people walking. If I walk in the mall, I get literally nervous because the people are just not moving in front of you. I have to pass them. I cannot be that slow"                                                                                                                                                               | Slower way of doing things                                                            |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "But this integration process in the country is more difficult than expected."                                                                                                                                                                                                                                                                                                                                                           | Difficulties to achieve full integration                                              | 4.3 Establishing relationships with locals                                                          |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "So we try to connect with local people, local South Africans, which was not easy I can, I can tell you that. Because yeah, you are a foreigner. You are intruding in there."                                                                                                                                                                                                                                                            | Building relationships                                                                |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "It makes us as an expat to put more effort, right, to get uh one among them."                                                                                                                                                                                                                                                                                                                                                           | Need to work harder to make friends                                                   |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "And difficult I would say it is to understand the background why there is tensions between two people, is not related to the people themselves, it's related to the history, since hundreds or thousands of years"                                                                                                                                                                                                                      | Understanding the impact of diverse racial backgrounds and histories on relationships | 4.4 Cultural diversity                                                                              |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "I then had to figure out what to do, how to manage the whole thing, so that you can make the best use of the people, their talents and possibilities for the company"                                                                                                                                                                                                                                                                   | People management of diverse team                                                     |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "I think it depends a little bit on the different cultures that you're having within South Africa. So everyone is kind of his own set."                                                                                                                                                                                                                                                                                                  | Navigating diverse cultures                                                           |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "It's also, yeah, something different than being responsible for human resources in the Netherlands or the US and especially because of the the cultural differences"                                                                                                                                                                                                                                                                    | Managing in a foreign culture                                                         |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             | Which challenges did you experience while being on your                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | "When you have a partner that is not, yeah, being proactive, not willing to reach out whatever, it's going to be very difficult because you don't have a work permit."                                                                                                                                                                                                                                                                   | Proactivity and self-initiative of partner required                                   | 5.1 Changes in family set-up (work & life situation) may affect success of international assignment |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "So you, yeah, need to have a certain character that you are, yeah, to reach out to take initiative etc. Otherwise there's a big risk that the assignment also is not working."                                                                                                                                                                                                                                                          |                                                                                       |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "Yes, so we had to wait – we had basically wait for almost a year or more than a year in fact to receive her visa"                                                                                                                                                                                                                                                                                                                       | Limited opportunities for partner                                                     |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "And my wife, yeah, she was really struggling and she felt guilty. Yeah, not doing anything and reading, etc"                                                                                                                                                                                                                                                                                                                            |                                                                                       |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | "So it's nearly impossible to get a work visa. Um, what is not too difficult to get is a study visa. It then of course comes with a cost."                                                                                                                                                                                                                                                                                               |                                                                                       |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             | "I think her biggest challenge was just more finding a job and doing things"                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                       |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             | "So here the first thing is because of the visa, you know it takes ages to get the visa for anything, right? So she's on a dependent pass and she can't work with that. And also you know what does happen is she will lose her independence, you know, because of some critical areas where she always you know with friends they say you be careful, you be careful don't go alone whether you are driving the car or you're not driving the car. So, so a lot of security concerns, you know, she makes her a little bit concerned about her, about, you know, moving out, right, and be independent. So she thinks always constrained." |                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                       |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |
|                                             | "But then, once you arrived, and the daily life starts, it is you say yes okay nobody is here, sometimes they say at the weekends I don't talk to anybody."                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Adapting to a new life without family                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                       |                                                                                                     |                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |  |

| Phases of the expatriate management process | Interview questions                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Codes                                             | Categories                               | Themes                                                                                      | Link to research objective (RO) / questions (RQ) |  |  |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|------------------------------------------|---------------------------------------------------------------------------------------------|--------------------------------------------------|--|--|
|                                             | international assignment in South Africa regarding general adjustment (e.g. food, living conditions, weather, family support, etc)? | "I mean we have electricity issues, which creates sometimes a mess in the morning when it comes to the traffic, so you have to plan your day maybe a bit more strict than in other countries, you always need a buffer because you never know."                                                                                                                                                                                                                                   | Load-shedding affecting traffic and road safety   | 5.2 The lack of basic needs              | Challenges experienced regarding general adjustment while being on international assignment |                                                  |  |  |
|                                             |                                                                                                                                     | "And maybe also the electricity problem here, but that's a local problem."                                                                                                                                                                                                                                                                                                                                                                                                        |                                                   |                                          |                                                                                             |                                                  |  |  |
|                                             |                                                                                                                                     | "having load-shedding. But we were lucky enough not to have it because we had a generator, but just kind of the traffic lights are out there."                                                                                                                                                                                                                                                                                                                                    |                                                   |                                          |                                                                                             |                                                  |  |  |
|                                             |                                                                                                                                     | "Well, obviously in terms of safety that is a critical aspect for us."                                                                                                                                                                                                                                                                                                                                                                                                            | General safety in SA                              |                                          |                                                                                             |                                                  |  |  |
|                                             |                                                                                                                                     | "Safety is a topic in South Africa"                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                   | 5.3 Settling in completely requires time |                                                                                             |                                                  |  |  |
|                                             |                                                                                                                                     | "We were used to being able to move around without any concerns. That's changed now, we have to be very cautious about where we go."                                                                                                                                                                                                                                                                                                                                              | Limited mobility options                          |                                          |                                                                                             |                                                  |  |  |
|                                             |                                                                                                                                     | "And if you're planning something let me know and check up front what you can do, what you can all do etc"<br>"you cannot go, just go for a hike somewhere that you always have to check is it safe, can we go there, etc"<br>"It's just kind of like these things that are different when it comes to - I'm used - I never had a car in my life. I've driven in those past 2.5 years I have driven more than my whole life. You don't walk much. I went to work with a bicycle." |                                                   |                                          |                                                                                             |                                                  |  |  |
|                                             |                                                                                                                                     | "And it's always finding that fine balance of not being scared, but being aware of your environment"<br>"So you are a bit naive also sometimes in the beginning and you think you can do things"                                                                                                                                                                                                                                                                                  | Dealing with unfamiliar safety situation          |                                          |                                                                                             |                                                  |  |  |
|                                             |                                                                                                                                     | "So we had to stay in temporary accommodation. So you're then staying in a in a small apartment, me going, yeah, to the office every day. And my wife, yeah, she was really struggling and uh, she felt guilty."                                                                                                                                                                                                                                                                  | Not being able to start immediately with new life |                                          |                                                                                             |                                                  |  |  |
|                                             |                                                                                                                                     | "But initially you know, first the barrier I would say is the acceptance. Personally as a family what we feel that until unless we cannot commit for a longer duration of stay, right. So when the people perceive you as an expat, right, some or the other day you will go back right? So the friendship and also the bonding will not be there. Yeah, this was also experienced by my daughter at school, right."                                                              | General acceptance in new environment             |                                          |                                                                                             |                                                  |  |  |

## Stage 4: Repatriation

| Phases of the expatriate management process | Interview questions                                                                                                                                                                              | Raw data quotations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Codes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Categories                                        | Themes                                                    | Link to research objectives (RO) / questions (RQ)                                                                                                                                                                                                                                                                               |
|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Repatriation                                | Do you know what the repatriation process looks like in your company?<br><br>If so, can you please describe it?<br><br>Which challenges do you expect to experience regarding your repatriation? | "It gets difficult, I just know from other people, once you insist on coming back to Germany. Because or if you insist on going into a fancy country."                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Lack of control over future location choice                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 6.1 Having to show a higher degree of flexibility | Challenges expected to experience during the repatriation | RO4: To identify and empirically investigate the challenges that expatriate managers expected to experience during and after their repatriation to their country of origin.<br><br>RQ4: What are the challenges that expatriate managers expected to experience during and after their repatriation to their country of origin? |
|                                             |                                                                                                                                                                                                  | "And my philosophy always was I don't change unless the next step is the right one for me. So but now being an expatriate in a timeframe the point comes when you have to, so you can't stay longer in that country. Now you have to take what is available. And that can be of course a challenge, that you say I take it because it's vacant, not because it's the right thing for me."                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Sacrificing expectations and goals                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                   |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                             |                                                                                                                                                                                                  | "I still don't understand why we have to – flexibility, I would say flexibility, sometimes a bit more flexibility in our process"                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Being stuck in company processes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                   |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                             |                                                                                                                                                                                                  | "So there must be some, you know overlap or separation of the family like a family go earlier to match the school timings and I go later to complete my assignment"                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Temporary family separation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                   |                                                           |                                                                                                                                                                                                                                                                                                                                 |
|                                             |                                                                                                                                                                                                  | "so if there is a specific position where you should go there as a next step, as a clear next step, then the timing has to match, so it is vacant when you come back. That's usually the difficulty."<br>"And I have seen this also in previous cases, for example, many years ago when a colleague returned from China, it was difficult for him to onboard again in the home country because there was no job for him available which was matching"<br>"The professionally finding the right position is you know, always tough right. So to match the aspirations of the self and also the aspirations and expectations of the management in India, right. So to get a alignment it takes a lot of time and also where I am happy. So to find the position might be challenging right."<br>"So, there is this somehow this feeling developing in myself, like what are they going to do with me?"<br>"Um, so I don't even know whether I will go back to Germany itself. So this is a bit complicated sort of in [company name]*. So there's not a very clear succession plan or kind of plan for that."<br>"But I need to consider also my age in a couple of days I'm 56, so what is the company doing with me when I'm returning in the age of 58?" | Find a matching job<br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br><br>< |                                                   |                                                           |                                                                                                                                                                                                                                                                                                                                 |

| Phases of the expatriate management process | Interview questions | Raw data quotations                                                                                                                                                                                                                         | Codes                                                                      | Categories                                             | Themes | Link to research objectives (RO) / questions (RQ) |
|---------------------------------------------|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|--------------------------------------------------------|--------|---------------------------------------------------|
|                                             |                     | "No, the repatriation is up to you, there is no support like here."                                                                                                                                                                         | No company support                                                         | 6.4 Repatriation not seen as important as other stages |        |                                                   |
|                                             |                     | "we have to take care of housing, schools and so on in Germany, which is also quite a challenge."                                                                                                                                           |                                                                            |                                                        |        |                                                   |
|                                             |                     | "So this is something where I hope communication could be a bit different."                                                                                                                                                                 | Lack of communication about process and options                            |                                                        |        |                                                   |
|                                             |                     | "When things should happen would make it easier. You know, you need to move first, then you resign your job, then you get your contract. So they should - a process flow when things should happen would make things so much easier, yeah." |                                                                            |                                                        |        |                                                   |
|                                             |                     | "I even think that it is much more important more efforts has to be spent on the returning than into the preparation."                                                                                                                      | Lacking focus on repatriation                                              |                                                        |        |                                                   |
|                                             |                     | "There's a contact in the HR department there, but we haven't discussed any future with me. Only when I was last time. And it was always on my initiative, yeah, where I addressed, okay I'm interested in another prolongation."           | Self-initiative needed to create plans                                     |                                                        |        |                                                   |
|                                             |                     | "But also here it the initiative has to come from myself and I'm almost afraid I will catch them unaware and unprepared here"                                                                                                               | Lack of communication leads to apprehension about surprising HR unprepared | 6.5 Uncertainty about the future                       |        |                                                   |
|                                             |                     | "and nobody is able to give me any ideas."                                                                                                                                                                                                  | Uncertainty about possible options                                         |                                                        |        |                                                   |
|                                             |                     | "I don't know where I'm going. I know neither the country nor the role nor the unit nor anything. So I don't know"                                                                                                                          | Uncertainty about what will happen next                                    |                                                        |        |                                                   |
|                                             |                     | "Like I know that I gotta have a job. I know that I'm gonna be paid. I know that I'm gonna be okay, but my girlfriend doesn't know where she would have to apply for. Where are we going to live? What is she going to do?"                 | Increased uncertainty for partner                                          |                                                        |        |                                                   |
|                                             |                     | "Do we search for an appointment? What do we do? Do we? How do we even plan our leave and how do we organise things?"                                                                                                                       | Inability to plan personal life                                            |                                                        |        |                                                   |

## ANNEXURE G: CERTIFICATE OF EDITING

### Certificate of language editing

23 October 2023

Stellenbosch

#### To whom it may concern

**Text editing of thesis titled 'The exploration of challenges in expatriate management of multinational corporations in South Africa: An expatriate perspective'**

I, Michèle Boshoff, confirm that I have edited the content (text only) of Chapters One, Two, Three, Four, and Five of this thesis and pointed out language errors and inconsistencies. The client had the prerogative to accept or to reject the editing proposals with the MS Word track changes function and the text editor did not see the final version. Proofreading the in-text references and the references list for accuracy and correct presentation, or cross-controlling for completeness and accuracy, did not form part of the editing scope.

Thank you for the opportunity to be of assistance



Michèle Boshoff

BA Hons (UPE) – Translation

Accredited Text Editor (ATE) – English

## ANNEXURE H: SIMILARITY REPORT

Exploration of challenges in expatriate management of multinational corporations in South Africa – an expatriate perspective

---

ORIGINALITY REPORT

---

**10**%

SIMILARITY INDEX

**9**%

INTERNET SOURCES

**4**%

PUBLICATIONS

**2**%

STUDENT PAPERS

---

## ANNEXURE I: SUPERVISORS PERMISSION TO SUBMIT



### ANNEXURE I – CERTIFICATE OF RELEASE (PROPOSAL SUBMISSION TO HIGHER DEGREES COMMITTEE OR SUBMISSION OF DISSERTATION/ THESIS FOR EXAMINATION) (IIE007)

Students submitting either their proposal for the Higher Degrees Committee or the final Dissertation or Thesis for examination must complete Part 1 of this form and send an electronic copy to their supervisor(s). Additionally, students resubmitting their Dissertation or Thesis for re-examination are required to provide a memo detailing how the revisions required by the examiners have been addressed as per Annexure M to this request.

Tick the relevant category for which the Certificate of Release is for.

|                                                     |                                     |
|-----------------------------------------------------|-------------------------------------|
| Proposal submission to the Higher Degrees Committee | <input type="checkbox"/>            |
| Dissertation or Thesis submitted for examination    | <input checked="" type="checkbox"/> |



| PART 1                                                                                                                                                                                                  |                                        | Candidate |            |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|-----------|------------|
| Candidate first names:                                                                                                                                                                                  | Lena                                   |           |            |
| Candidate surname:                                                                                                                                                                                      | Hemker                                 |           |            |
| Student number:                                                                                                                                                                                         | [REDACTED]                             |           |            |
| Degree:                                                                                                                                                                                                 | Master of International Business (MIB) |           |            |
| I confirm that my dissertation/thesis has been prepared in accordance with the guidelines and requirements of The Independent Institute of Education Research and Postgraduate Studies Policy (IIE007). |                                        |           |            |
| Lena Hemker                                                                                                                                                                                             |                                        |           | 30/10/2023 |
| Signature of candidate                                                                                                                                                                                  |                                        |           | Date       |

| PART 2                                                                                                                                                                                                               |                    | Supervisor and co-supervisor |            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|------------------------------|------------|
| Supervisor first and last names:                                                                                                                                                                                     | Conrad van Greunen |                              |            |
| Co-supervisor first and last names                                                                                                                                                                                   | n/a                |                              |            |
| I confirm that the candidate's dissertation/thesis has been prepared in accordance with the guidelines and requirements of The Independent Institute of Education Research and Postgraduate Studies Policy (IIE007). |                    |                              |            |
| [REDACTED]                                                                                                                                                                                                           |                    |                              | 30/10/2023 |
| Signature of supervisor                                                                                                                                                                                              |                    |                              | Date       |
| [REDACTED]                                                                                                                                                                                                           |                    |                              |            |
| Signature of co-supervisor                                                                                                                                                                                           |                    |                              | Date       |