

WHAT MAKES EXPATRIATE ASSIGNMENTS SUCCESSFUL?

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Abstract

Expatriates are employees on assignments that require them to live overseas for lengthy periods (often defined as at least six months, a period forcing them and their families to interact with the host community). This paper identifies factors affecting expatriate assignment success.

Globalisation generates more and more demanding international assignments (IBM stands for "I've been moved."). About half of expatriate assignments fail, generating high tangible and intangible costs. Expatriates may terminate assignments early for job or family reasons; are ineffective on the job; or do not reintegrate on returning to Head Office.

Clear objectives and rational management enhance the success of an organisation's expatriate program; we propose a seven-step methodology that will help ensure that expatriate postings are managed effectively and efficiently. We stress the importance of planning the fruitful reintegration of repatriates on their return to Head Office and mention some emerging issues.

WHAT MAKES EXPATRIATE ASSIGNMENTS SUCCESSFUL?

INTRODUCTION

Although statistics on the number and cost of expatriate assignments are difficult to obtain, multinational organisations frequently post employees to foreign countries for periods that entail employees (and their families) living in and hopefully adjusting to a foreign culture. Using expatriates is expensive and the probability of failure is high. Black and Gregersen (1999) report that "Almost 80% of midsize and large companies send professionals overseas, and 45% intend to expand the number they have on assignment. Expatriates are generally two or three times more expensive than if they were in a similar position in the United States."

Although hard data is scarce, successful expatriate assignments can be extremely beneficial. Employees and their families may be greatly stimulated, learn much about different cultures and transfer this knowledge to Head Office. The skills an expatriate has, essential to a project or role, but not available in the host country, may be transferred to indigenous employees. There are great economies in one person or team replicating similar projects in different countries. More subtly, the apparently irrational demands of a remote Head Office may (at long last) be understood; expatriates may transfer elements of the corporate culture to outposts and carry knowledge of local conditions, talents and opportunities back to Head Office. A foreign assignment is often considered a good test of managerial and diplomatic skill and a prerequisite for promotion.

In this paper most references prior to 1999 are suppressed; a complete list can be obtained from the second author. Special issues of *HRMagazine*, March 2000, *Compensation & Benefits Review* July/August 2000 and *Workforce*, March 1999 contain numerous short articles on expatriates and their management.

PROBLEMS WITH EXPATRIATE PROGRAMS

The tangible cost of posting an employee and family overseas is considerable (Dolins, 1999). It is thought that at least half of expatriate postings are substantial or partial failures (Hirschhorn, 1999), one company opining that a failure can cost up to \$US2M. Today's employees are less likely to be enthused by overseas assignments, recognizing them as possible career impediments that can disrupt spouses' careers and stress and physically endanger individuals and families. Failure can be manifest in the following ways:

- Because of personal or family concerns the expatriate returns early. Potential expatriates' decisions to accept or remain in an overseas posting may be complicated by their spouses careers (the two body problem) (Finney, 2000, Kaplan, 2000). A professional spouse may become intolerably bored if anticipated job opportunities do not eventuate. Some writers report failure rates of between 15% and 70% with associated direct costs of \$US55,000 to \$US250,000 for each early return but other writers have given estimates of 8% and 10%. The sense of isolation and culture shock may have been reduced by improving access to goods and services (especially schools and medicine) and better, cheaper, communications.
- Expatriates stay but under-perform (Ashamalla, 1998). Black and Gregersen (1999) reported that one-third of the expatriates that stay do not perform up to expectations. Daniels (1998) opined that Head Office may lose credibility with foreign employees because of poor expatriate selection that may affect subsequent acceptance of a replacement. Expatriates with excellent technical skills may perform poorly because they are unable to adapt to a different culture; inadvertently creating an "ugly American" stereotype that may take disproportionate time and effort to erase. Because they are remote from Head Office, they may have to assume (for example negotiating) roles for which they are untrained and unused to. This is not to say that poor working relationships are always expatriates' faults, host nationals may not be hospitable.

These difficulties may arise because of cultural differences (often exacerbated by language differences) manifest in the work place and in society. Hofstede (1984) identifies four different cultural dimensions: attitudes to authority, tolerance of risk, individual versus group and masculinity versus femininity. The first is exemplified by the experience of an American executive posted to Australia. On finishing a presentation to his Australian subordinates he was briskly informed that it was "bullshit". Cultural and language difficulties may make it difficult for expatriates and their families to find a social life in the host country and repressive political cultures may seem stifling. Foreigners may be resented, especially if (like UN workers in East Timor) they have superior standards of living or are perceived to be doing jobs that could be done by indigenes. There may be practical difficulties such as finding suitable schools and houses, accessing health care and different tax regimes.

A METHODOLOGY

Expatriate assignments are more likely to be successful if they are competently managed; we set out a seven-step process that will help ensure that people are properly selected, trained, supported and repatriated. Such schemes ought to be part of a human resource management strategy. The process comprises:

Strategic Planning

The use of expatriates instead of indigenes should be justified because it optimizes the use of and develops scarce human skills. Presumably, a goal is to improve indigenes' skills. Two recognized expatriate roles are control, "...in which the expatriate works to align the operations of the subsidiary with that of the Japanese parent" and knowledge transfer, in which knowledge is transferred between Head Office and the branch (Delios and Bjorkman, 2000).

HR Planning

The HR strategy should be expressed as HR policies and programs, e.g. for recruitment, selection, support and repatriation.

Recruitment and Selection

Employees offered work overseas should deeply and honestly consider their own and their family's suitability. Cultural differences aside, a person enjoying a structured and predictable work environment, might not cope with a pioneer's circumstances. Some kinds of personal characteristics (Black and Gregersen, 1999, Caligiuri, 2000) (sensitivity, extroversion, energy, knowledge of the local language and flexibility) are probably required. Forster (2000) scorns the idea that "nomadic" managers who have no home base can succeed or preserve their mental health.

Pre-departure Program

Expatriates and their families need to know about their new country's language, culture (especially points of difference) and business practices. Housing and schooling should be arranged before departure, advice from indigenes and people who have already worked in the destination would be helpful, as would preliminary visits (and introductions to other expatriates). It is especially important that trailing spouses' roles be considered; can appropriate jobs be found for them?

During Assignment Support

While overseas, expatriates and families should be supported and their morale and performance monitored. An avoidable danger (perhaps by having a Head Office mentor) is expatriates experiencing an "out of sight, out of mind" syndrome, especially painful when accidentally discovering that Head Office has been downsized and one's permanent job eliminated. To be welcomed on arrival and helped to settle in the host country is very helpful. It is prudent to prepare emergence evacuation plans for unstable countries.

Repatriation

Oddly, employees who successfully complete an overseas assignment are quite likely to be disenchanted on return. This is because: their old job seems comparatively undemanding; their old job (even department) has disappeared and they are left unattached or assigned to a low status role and/or role that does not exploit their new skills; their peer groups have dispersed and they have been disempowered; they see that their careers have not been accelerated but that they have been leapfrogged by the unenterprising who stayed at Head Office (Black and Gregersen, 1999, Stroh, Gregersen et al., 2000). About 60-70% of repatriates leave the company within three years of return. The cost of skills and knowledge thus lost is considerable. Basic planning can minimize disappointments; before return, the expatriate, helped by a mentor, should seek and informally apply for suitable Head Office positions, preferable those that will exploit and allow sharing of hard-won experience and skills. Families may experience reverse culture shock (no more servants).

Evaluation

When the assignment has finished, it should be evaluated in the light of corporate and HR strategies. It may be difficult to measure intangibles such as knowledge and skill transfer or changes in branches' attitudes to Head Office.

CONCLUSION

It is important that foreign assignments be planned in the light of corporate and HR strategies; in particular, managers should be aware of the considerable tangible and intangible costs and benefits of using and misusing expatriates. The intended role of expatriates should be justified (Why can't this be done by an indigene?) and the effects of the posting on the expatriate's career and family considered. Expatriates must assume responsibility: they must decide whether they are suitable, contribute to success and ensure that knowledge and skills gained are transmitted.

Some recently emerging issues are:

Reverse expatriation

We forget that some employees (and thousands of students) are posted from branches to Head Office. Finney (2000) describes the considerable culture shock of "reverse expatriation".

Going Native

An expatriate, especially one who marries an indigene and has children, may be reluctant to return to Head Office. Circumstances vary; sometimes staying may be consistent with the employer's objectives.

Virtual expatriation

Joinson (2000) notes that better communications such as videoconferencing and cheaper travel reduce the need to stay overseas for long periods of time. This may make leaving an expatriate's family at home more practical and cheaper. However, not living on the job demonstrates a lack of commitment.

Women

Expatriates are not homogenous although our recent survey indicates that women are as likely as men to want to work overseas. Women, and members of some races and religions, may face particular difficulties in some cultures.

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