

**EXPLORING PUSH AND PULL FACTORS EXPERIENCED BY SOUTH AFRICAN
SELF-INITIATED EXPATRIATES**

by

ELSJÉ MOSTERT

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Supervisor: Prof. Yvonne du Plessis

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DECLARATION

I, Elsjé Mostert, declare that *Exploring push and pull factors experienced by South African self-initiated expatriates* is my own unaided work both in content and execution. All the resources I used in this study have been cited and referred to in the reference list by means of a comprehensive referencing system. Apart from the normal guidance from my study leaders, I have received no assistance, except as stated in the acknowledgements.

I declare that the content of this dissertation has never been used before for any qualification at any tertiary institution.

I, Elsjé Mostert, declare that the language in this thesis was edited by Rika Weiss (MA (Applied Linguistics and Literary Science)).

Elsjé Mostert

Date: 20 September 2013

Signature

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Firstly, I would like to thank my Heavenly Father for enabling me and giving me the perseverance to complete this dissertation. Thank You, Lord, that I can feel safe in the knowledge that I can do all things through You who strengthen me (Philippians 4:13).

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- To those colleagues, close friends and family who expressed interest in my study and who played the roles of motivators and believers.

“Let perseverance finish its work so that you may be mature and complete, not lacking anything.” – James 1:4 (NIV)

Elsjé Mostert
Pretoria
September 2013

ABSTRACT

EXPLORING PUSH AND PULL FACTORS EXPERIENCED BY SOUTH AFRICAN SELF-INITIATED EXPATRIATES

by

Elsjé Mostert

PROMOTER : Prof. Yvonne du Plessis
DEPARTMENT : Human Resource Management
FACULTY : Economic and Management Sciences
DEGREE : MCom (Industrial and Organisational Psychology)

A preliminary literature review indicated that not much research has been done on self-initiated expatriation (SIE), particularly in a South African context. The purpose of this study is twofold: Firstly, by reviewing previous research, this study aims to make a valuable contribution to the literature on SIE, particularly regarding the motivations behind SIE. Secondly, this study aims to explore and develop a deeper understanding of the push and pull factors experienced by South African self-initiated expatriates (SASIEs).

An empirical, exploratory qualitative approach, through the utilisation of qualitative field research, was employed as a means of inquiry. Furthermore, interpretivism was used as a research paradigm. Purposive sampling was applied, and the sample used consisted of nine individual South African self-initiated expatriates who had been working in their host countries for a minimum of six months. Data were obtained through in-depth semi-structured interviews. By implication only a few research questions were generated to guide the interview; however, participants were not limited to certain responses. This allowed for rich data to be obtained that were systematically analysed using grounded theory analysis to steer the process in a practical manner through the transcription of data and the rigorous extraction of codes towards the results that could best answer the original set of research questions. Criteria for rigour, authenticity, trustworthiness and credibility were applied and demonstrated throughout.

The conceptual framework of the study was kept in mind during the research, the themes that emerged were explored, and the findings that were reached were substantiated through an extensive literature review.

The conclusion was reached that South African self-initiated expatriates experienced certain push factors from the home country (South Africa), and that there were equally strong or stronger pull factors to the host country. All these factors contributed to the participants' decision to expatriate. Interestingly, there seemed to be no real push factors from the host country; these were rather perceived as challenges that had to be endured. Furthermore it seemed that, as far as the sample group in this study were concerned, South Africa did not offer strong pull factors, and that, if the participants were to repatriate to South Africa, it would be for sentimental reasons. This could hold some implications for South African organisations especially in terms of retaining skilled labour or attract the skilled labour who has already expatriated. Recommendations and opportunities regarding future research were also mentioned.

Key words: Assigned expatriation, Self-initiated expatriation, South Africa, Pull factors, Push factors, Qualitative research.

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EXPLORING PUSH AND PULL FACTORS EXPERIENCED BY SOUTH AFRICAN SELF-INITIATED EXPATRIATES

CHAPTER 1: INTRODUCTION TO THE STUDY

1.1 INTRODUCTION

This chapter serves as an overview of the study in that it introduces and provides the background to the question of what the motivations for self-initiated expatriation are, followed by a discussion of the way in which this question relates to the study. The problem statement and research objectives, as well as the unique contribution of this study to the body of knowledge on self-initiated expatriation of South Africans, are mentioned. Lastly it will provide an outline of the chapters to follow.

1.2 BACKGROUND

Self-initiated expatriation (SIE) and its career opportunities are becoming a specialised research area internationally due to global mobility (Ainuddin, & Lily, 2012; Bozionelos, 2009; Selmer, & Luring, 2010) and the flexibility of environments (Donnay, 2012). Although there is an abundant amount of literature on expatriation, the availability of the literature and research on SIE and self-initiated expatriates (SIEs) is limited (Ainuddin, & Lily, 2012; Dohery, Richardson, & Thorn, 2013; Maharaj, 2011; Selmer, & Luring, 2010; Selmer, & Luring, 2011(a); Selmer, & Luring, 2011(b)). My interest in this seemingly under-researched field began with the experience of being the daughter of a man who voluntarily went to work in foreign countries; thus he expatriated on his own initiative.

This sparked my curiosity and made me question why someone would choose to leave loved ones behind and go and work in a foreign country. Initially I turned to the literature in an attempt to answer some of my questions and gain some understanding. Although many of the questions were answered, some remained unanswered.

The literature suggests that the concept of expatriation can be defined as “the undertaking of employment outside one’s home country” (Bozionelos, 2009, p. 111). The initial implication was that employees are sent away by their organisations (Bozionelos, 2009; Green, 2009), in other words that these employees are assigned expatriates (AEs) who undergo assigned expatriation (AE). However, the latest phenomenon appears to be that individuals leave voluntarily (Ainuddin, & Lily, 2012; Green, 2009), in other words that they choose to be SIEs. For the purpose of this study I will make a distinction between assigned expatriates (AEs) and self-initiated expatriates (SIEs).

AEs are individuals who are assigned to a project in another country by an organisation based in the home country, whereas SIEs are individuals who voluntarily seek temporary or permanent employment in a foreign country or are presented with a temporary or permanent employment opportunity in a foreign country (Ainuddin, & Lily, 2012; Dohery et al., 2013; Jokinen, Brewster, & Suutari, 2008).

The exploration of the push and pull factors experienced and perceived by South African expatriates, when they are outside the country, also require a discussion of repatriation to the home country. Repatriation can be described as the concluding stage of expatriation because it refers to the return to the home country (Kraimer, Shaffer, Harrison, & Ren, 2012). For the purpose of this study reference will be made to temporary repatriation, which is when an individual returns to the home country (South Africa) for a short period but expatriates again on own initiative.

To place this study in context, a brief summary of my story and the reasons why I started this study will be shared.

1.3 PERSONAL CONTEXT

Since 2008, my father, a South African citizen from the previously advantaged group of white South Africans during apartheid, has been working as a self-initiated expatriate in different countries. His voyage of SIE began when he voluntarily went to work in the Congo in Central Africa to restart an old copper mine. Unfortunately the project was abandoned in about a year due to the drastic drop in the copper price. Therefore, he returned (temporarily repatriated) to South Africa and worked on the Gautrain project for eighteen months. While working on this project he acquired a new skill, namely grouting. This opened up the opportunity for his second voluntary expatriation to Hong Kong, where he has been working since 2010.

“What line of profession is your father in?” many people ask me, “engineering or project management, maybe?” Time and again their reactions are the same – shock and surprise when I tell them that he is a shift boss. Prior to 2008, my father had been working for 27 years as a shift boss in South African gold mines and never thought of exploring his global mobility.

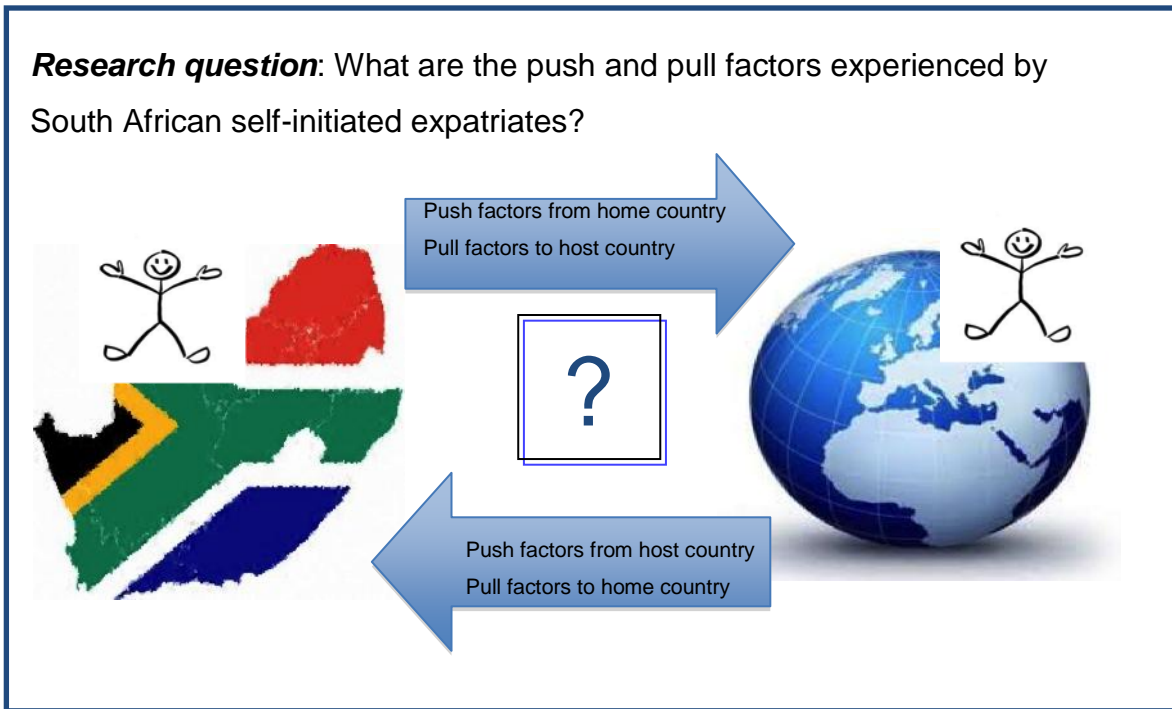
What makes this story so significant is the fact that although my father is a skilled person, in South Africa he would not necessarily be seen as a highly educated person or someone with professional status. In Hong Kong he is seen as an ‘expert’ in his line of work, especially in grouting. This made me think that his decision to expatriate could have been inspired by reasons other than being a member of a minority group in South Africa or seeking higher remuneration. I considered the possibility that other factors could have contributed to his decision to expatriate voluntarily on more than one occasion, and that there could be other SIEs who had done so for the same or other reasons.

Being a student of Industrial and Organisational Psychology, SIE interests me in particular because of the need to understand what makes people behave the way they do in organisations; in this case why people leave and re-enter organisations in a global context, thus crossing borders voluntarily. Furthermore, there is a need to explore the impact of this increasingly popular phenomenon of SIE on South African organisations and the country’s economy.

1.4 CONTEXT OF SOUTH AFRICAN SIE

The framework that will be used throughout this study is depicted in Figure 1.1 below. This framework describes the research question and illustrates the story of SASIE.

Figure 1.1: Conceptualisation of study



Source: Author's own

On the left-hand side of the figure, there is a stick man or woman called SASIE (South African self-initiated expatriate). SASIE is in his or her home country (South Africa). The top arrow represents the push factors from the home country and the pull factors to the host country, which result in SASIE going to the host or foreign country. On the right-hand side SASIE is in the host country (foreign country). The bottom arrow represents the push factors from the host country and the pull factors to the home country.

Thus, the story of SASIE can be a continuous, boundless cycle of moving in and out of the home country and host countries as a result of certain push and pull factors. The question mark between the arrows indicates the uncertainty about what these push and pull factors are that SASIE experiences and that contribute to his or her decision to voluntarily expatriate to the host country and to return to the home country temporarily (temporary

repatriation). And this is the aim of this study – to determine what these factors are and to explore them.

1.5 PROBLEM STATEMENT

There is a lack of literature on SIE (Ainuddin, & Lily, 2012; Bozionelos, 2009; Jokinen et al., 2008), in particular as far as qualitative research is concerned. The majority of studies done focused on SIEs in the academic sphere, and only two of these studies were found to be qualitative in nature (Richardson, & Mallon; 2005 Richardson, & Zikic, 2007). Most of the research done on academic SIEs was quantitative in nature (Ainuddin, & Lily, 2012; Alshammari, 2012; Chen, 2012; Maharaj, 2011; Selmer, & Luring, 2010; Selmer, & Luring, 2011(a); Selmer, & Luring, 2011(b)). Some studies focussed on female SIEs (Fitzgerald & Howe-Walsh, 2008; Tharenou, 2010; Van den Bergh, & Du Plessis, 2012); others included sample groups representing different professions or highly skilled and/or educated individuals (Al Ariss, & Ozbilgin, 2010; Bozionelos, 2009; Donnay, 2012; Jokinen et al., 2008; Scurry, Rodriguez, & Bailouni, 2013; Suutari, & Brewster, 2000; Thorn, 2009). Myers and Pringle (2005) conducted a qualitative study on 50 sojourners (individuals who resides in a host country temporarily). Similarly, a qualitative study was conducted by Inkson and Myers (2003) on 50 young New Zealanders who had acquired overseas experience (OE) by going on extended overseas working holidays.

SIE and the factors contributing to individuals' decisions to expatriate and repatriate on multiple occasions have sparked the interest of researchers, and specifically of this researcher. ***The main research question is thus:*** What are the push and pull factors experienced by South African self-initiated expatriates? Furthermore, why do people continue to work and stay in a foreign country rather than to repatriate to their home country, especially when most of their family are still in the home country? Is it only about the higher remuneration they often get, or do factors like enhanced status, more experience and opportunity, better working conditions, better lifestyle and safer environments, to mention but a few possibilities, also play an important role?

1.6 PURPOSE STATEMENT AND RESEARCH OBJECTIVES

The purpose of this study is to gain an in-depth understanding of and insight into the push and pull factors that contribute to the decision of South African SIEs to expatriate voluntarily.

The primary research objective that has been formulated with a view to fulfilling the purpose of this study and answering the research question is to explore the push and pull factors that South African SIEs experience and that contribute to their decision to expatriate voluntarily.

The secondary objectives are to –

- determine, explore and understand the **push** factors of the *home country* (South Africa) **and** the *host country* (foreign country) as experienced by South African SIEs; and
- determine, explore and understand the **pull** factors of the *home country* **and** the *host country* as experienced by South African SIEs.

1.7 DEFINITION OF KEY TERMS

The key concepts or terms used in this study are indicated below. For the purpose of this study a distinction will be made between assigned expatriates (AEs) and self-initiated expatriates (SIEs).

AEs (assigned expatriates): employees who are assigned to projects in other countries by their organisations

AE (assigned expatriation): the process of being assigned to a project in another country by an organisation

SIEs (self-initiated expatriates): individuals who voluntarily seek employment in a foreign country or are presented with the opportunity of either temporary or permanent employment in a foreign country

SIE (self-initiated expatriation): the process of voluntarily seeking employment in a foreign country or being presented with the opportunity of either temporary or permanent employment in a foreign country

These definitions were formed after consulting various sources in the literature, for example the writings of Ainuddin and Lily (2012), Dohery et al. (2013), Jokinen et al. (2008), and Schoepp and Forstenlenchnes (2011).

Repatriation: the concluding stage of the expatriation process, in other words when individuals return to their home country (adapted from Kraimer, Shaffer, & Bolino, 2009)

Temporary repatriation: an individual's return to the home country (South Africa) for a short period before expatriating again

Push factors: (in this study) any negative elements or challenging factors that contribute or can contribute to the decision of South African SIEs to expatriate to a host country or repatriate to the home country

Pull factors: (in this study) any positive elements or beneficial factors that contribute or can contribute to the decision of South African SIEs to expatriate to a host country or repatriate to the home country

In Table 1.1 the abbreviations used in this document are explained.

Table 1.1: Abbreviations used in this document

| Abbreviation | Meaning |
|--------------|-----------------------|
| AEs | Assigned expatriates |
| AE | Assigned expatriation |

| | |
|----------|--|
| SIEs | Self-initiated expatriates |
| SIE | Self-initiated expatriation |
| SASIE(s) | South African self-initiated expatriate(s) |

1.8 ACADEMIC VALUE AND CONTRIBUTION OF THE STUDY

While individuals who initiate their own expatriation (SIEs) have been acknowledged as a distinct (Bozionelos, 2009) and diverse (Suutari, & Brewster, 2000) group of people, previous research done on this group is limited (Ainuddin, & Lily, 2012; Bozionelos, 2009; Dohery et al., 2013; Inkson, Arthur, Pringle, & Barry, 1997; Jokinen et al., 2008; Selmer, & Luring, 2011(a); Suutari, & Brewster, 2000; Thomas, Lazarova, & Inkson, 2005). Hence not enough is known about this important yet under-researched group of individuals. Accordingly, the concept of SIE has been neglected for many years; it received some attention for the first time only in the late 1990s (Dohery et al., 2013). This was after a revolutionary article in which Inkson et al. (1997) addressed the issue of self-initiated foreign work experience (SFE). Subsequently, our understanding of SIE and SIEs has developed exponentially.

Still, most of the literature have focussed on assigned expatriates (AEs) (Ainuddin, & Lily, 2012; Boselie, 2010), which proves to be surprising since SIEs have been argued to make up a greater share of the global workforce than do AEs (Myers, & Pringle, 2005). Furthermore, seeing that there is a clear difference between SIEs and AEs (Peltokorpi, & Froese 2009), little of the extensive literature written on AEs is valid for SIEs (Suutari, & Brewster, 2000). Consequently, more research has been called for (Dohery et al., 2013; Selmer, & Luring, 2011(a)) in order to better understand the issues associated with SIEs and their SIE journey.

What motivates a person to expatriate to a host country? This is a question that has been raised in the literature; however, the answer is normally unsatisfactory as financial benefit is usually given as the primary motivator (Robertson, Gaggiotti, & Low, 2007). Therefore, this research study will make a valuable contribution by expanding on the existing, yet limited, body of knowledge about SIEs and their expatriation.

The researcher has not been able to find any studies conducted on SIE involving the South African population; another reason why this study is essential. The significant contribution of this research study is firstly to gain an in-depth understanding of the different perceptions and experiences of South African SIEs in and outside South Africa and of the push and pull factors that have influenced their decision to go abroad. Although Bozionelos (2009) has expressed the opinion that most research on SIE is exploratory and descriptive, I have found that most research on expatriation entailed quantitative methodologies (Bozionelos, 2009; Chen, 2012; Jokinen et al., 2008; Maharaj, 2011; Selmer, & Luring, 2011(b); Suutari, & Brewster, 2000; Tharenou, 2010; Thorn, 2009) and that none of these studies involved the South African population.

It is evident that more research is needed on SIE and SIEs. This study will use qualitative research methods as a means of inquiry in order to gain an in-depth understanding of and some insight into the experiences and perceptions of South African SIEs. According to research (Shah, & Corley, 2006), qualitative methods are very influential in terms of theory building or refining some of the existing theories. The intention is to generate and refine theory by making use of various data sampling methods, which include semi-structured interviews and electronic responses.

1.9 OUTLINE OF THE STUDY

Table 1.2 presents an outline of the study and gives a brief description of each of the chapters that will follow.

Table 1.2: Outline of study and chapters to follow

| | |
|------------------|--|
| Chapter 2 | In this chapter I provide an overview of my research design and methodology. Furthermore, I present considerations on research rigour and my own research expedition, which led to a conclusion that qualitative research would be the best approach to use to answer the primary research question. Thus, the aim of this chapter is to provide a theoretical and a practical explanation of my research, and to explain the thinking and the |
|------------------|--|

| | |
|------------------|---|
| | processes behind each step to ensure qualitative research rigour. |
| Chapter 3 | The aim of this chapter is to see whether some findings about the research objectives will surface. This chapter is exploratory and aims to identify and describe the subgroups or themes that emerged from Chapter 2. Consequently, Chapter 3 will aim to answer the main research question, which is: What are the push and pull factors experienced by South African self-initiated expatriates? |
| Chapter 4 | This chapter consists of a comprehensive literature review with the aim of gaining a general understanding of the concepts of SIE and SIEs. The second part of the literature review is structured in such a manner that it reflects the research questions of the study and investigates the themes that emerged in the previous chapter. |
| Chapter 5 | The study is concluded in this chapter, and the shortcomings of the study as well as recommendations for future research are discussed. |

1.10 CONCLUSION

Chapter 1 introduced the study by giving a background on the concept of SIE, as well as placing the motivation for embarking on the study in a personal context. I created a conceptual framework that will be used throughout the study as an aid to understand the research scope and the research question. The chapter furthermore emphasised the need for more research on the concept of SIE. The next chapter provides an overview of my research design and methodology, and presents considerations on research rigour.

CHAPTER 2: RESEARCH DESIGN AND METHODOLOGY

In this chapter I provide an overview of my research design and methodology. Furthermore, I present considerations on research rigour and my own research expedition, which led to a conclusion that qualitative research would be the best approach to use in answering the primary research question, which is “to determine and explore the push and pull factors as experienced by South African SIEs”. Thus, the aim of this chapter is to provide a theoretical explanation of my research and of the thinking behind and the process of each step taken to ensure qualitative research rigour.

2.1 RESEARCH PARADIGM

This research is situated in an interpretivist paradigm with its emphasis on exploring experiences, perceptions and interpretations. The interpretive approach has been accepted as useful in exploratory research (Neuman, 2006), such as that undertaken in this study. The interpretivist paradigm seeks to produce descriptive analyses that emphasise deep, interpretive understanding of social phenomena (Henning, Van Rensburg, & Smit, 2004). This objective ties in with the focus of the study, which is to gain an in-depth understanding of the push and pull factors as experienced by South African SIEs. More specifically the study will focus on the understanding of SIEs’ career experiences and perceptions in their new environment (host country) from the standpoint of their unique contexts and backgrounds.

Interpretive social science is related to hermeneutics (Maree, 2010; Neuman, 2006; Ponterotto, 2005), a theory of the practice of interpretation (Maree, 2010) and meaning, which originated in the nineteenth century (Neuman, 2006). Twenty to thirty years ago a shift occurred in these study fields and the focus came to be placed on capturing the lives of participants in order to understand and interpret the meanings people assign to their lives (Maree, 2010). With that the role of a researcher as a co-creator of meaning has become increasingly important (Henning et al., 2004). According to the same authors the aim of research within an interpretive perspective is not to prove but to disprove. Ontology is concerned with the nature of reality and being (Ponterotto, 2005). From an ontological perspective the interpretivist paradigm proposes that objective social realities do not exist

independently from subjective social realities (Porta, & Keating, 2008; Henning et al., 2004) and, furthermore, that multiple realities exist (Ponterotto, 2005). The reality of the mind is influenced by and dependent on the process of observation, and different viewpoints of the world do not refer to relativism (Henning et al., 2004).

The study of the relationship that exists between the research participant ('knower') and the researcher ('would-be knower') is known as epistemology (Ponterotto, 2005). Epistemologically speaking, interpretivism aims to understand subjective knowledge (Porta, & Keating, 2008). The interpretive researcher holds that realities are socially constructed, therefore, the dynamic contact between participant and researcher is essential to capturing and unfolding the 'lived experience' of the participant (Ponterotto, 2005).

2.1.2 Interpretive theory of knowledge

Knowledge is constructed by both observing phenomena and by describing people's intentions, values, beliefs, self-understanding, reasoning and meaning making. In order to understand phenomena a researcher has to look in different places and at different things; for that reason knowledge is seen as distributed and scattered (Henning et al., 2004). Furthermore, phenomena are understood through mental processes of interpretation, which are influenced by and interact with social contexts (Henning et al., 2004). In an interpretive study, the key role players are the types of knowledge frameworks that drive society, also known as its discourses. I, as the researcher, will interrogate these knowledge frameworks to search for and understand the frames that shape meaning. In other words, I will not only look at *what* meaning people make or the fact *that* they make meaning but I will also seek to understand the *way* in which people make meaning. This corresponds with a statement made by Neuman (2006) that interpretive researchers study not only external or observable behaviour but also meaningful social action. Social action normally has a purpose or intent and can be described as the subjective meaning people attach to actions. The researcher must take into account the social context of the action as well as the social actor's reasons for acting. Therefore, researchers in this paradigm are extremely sensitive to the role of context (Henning et al., 2004).

2.2 DESCRIPTION OF INQUIRY STRATEGY

2.2.1 A description of the strategy of inquiry

Since this research study is interested in exploring the push and pull factors as experienced by South African SIEs, I will make use of an empirical, exploratory qualitative approach as a means of inquiry.

According to Henning et al. (2004), qualitative inquiry seeks to gain an in-depth understanding through comprehensive investigation. In other words, the researcher conducting a qualitative inquiry will aim to understand and explain through argumentation, and by using evidence from data and the literature, what the phenomenon or phenomena being studied are about. The 'variables' in the study are normally not controlled because it is exactly this freedom and natural development of action and representation that the researcher wishes to capture. For the same reason an instrument will not be developed beforehand in order to prevent it from placing boundaries and limiting understanding and data (Creswell, 2009; Henning et al., 2004).

Qualitative modes of inquiry usually include interactive studies, for example ethnography, case study, phenomenology and grounded theory, as well as non-interactive studies, for example concept analysis and historical analysis (Maree, 2010). The following section will elaborate briefly on the basic characteristics of qualitative research.

2.2.2 The basic characteristics of qualitative research

According to Creswell (2009, p. 4), "Qualitative research is a means for exploring and understanding the meaning individuals or groups ascribe to a social or human problem". It has also been cited in O'Neil (2011) that, compared to quantitative research, qualitative research produces rich, detailed data about a smaller number of people and cases. Qualitative research involves the meanings, definitions, concepts, characteristics and descriptions of certain phenomena experienced by individuals. Throughout the qualitative

process questions arise about which data is collected (typically in the participant's surroundings), and the meaning of the data is interpreted by the researcher (O'Neil, 2011).

According to Creswell (2009), qualitative research has a few basic characteristics. A very important characteristic is that qualitative research has an emergent design, which typically means that all the methods and stages may change after the researcher has entered the field and started to collect the data. Often, however, a theoretical lens is also applied to qualitative data and normally the researcher will aim to obtain a holistic and complex picture (Creswell, 2009). Qualitative research has also been referred to as holistic, naturalistic, interpretive and phenomenological (Ahrens, & Chapman, 2007).

Normally, qualitative research takes place in a natural setting, where the researcher collects data at the site or in the field where participants might experience the problem or issue being studied, and a one-on-one interaction takes place. For the interpretivist paradigm, inquiry is always undertaken in natural settings in order to collect substantial situational information (Henning et al., 2004).

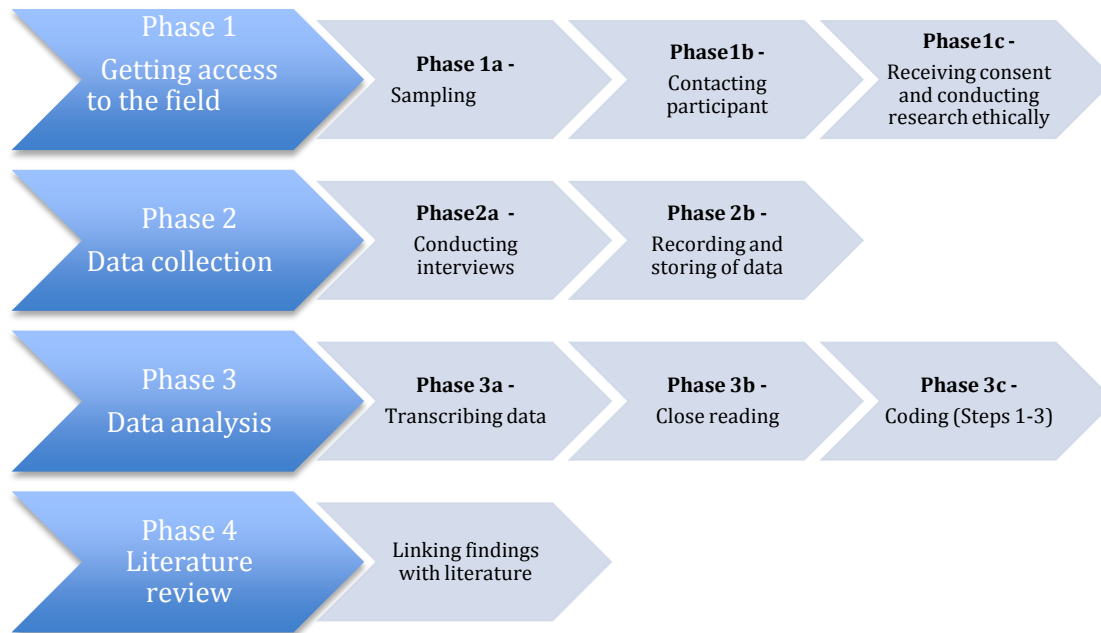
Creswell (2009) stated that the researcher is the one that will gather the actual data, either through making observations about behaviour, examining documents or interviewing participants, therefore, the researcher is the key instrument in the end. Another important characteristic of qualitative research is the fact that the researcher relies on multiple sources of data. Observations, documents and interviews can all form part of the same study and can be used to obtain the data which the researcher will review in an attempt to gain understanding (Creswell, 2009).

Lastly, it is important to note that I, as the researcher, may have to work back and forth in the data set and the themes until a comprehensive set of themes has been established (Creswell, 2009; Neuman, 2006). In addition, I will have to focus more on the meanings participants attach to the problem or issue, rather than on what the literature says or what my own interpretation is (Creswell, 2009); this characteristic ties in with the characteristics of the interpretivist paradigm.

2.3 THE RESEARCH EXPEDITION

The steps that have been taken to conduct this qualitative research study are illustrated in Figure 2.1.

Figure 2.1: The research expedition



Source: Author's own

2.3.1 Phase 1 – Getting access to the field

Phase 1a – Sampling

Sampling is the process that a researcher uses to select an appropriate portion of the population to be studied (Maree, 2010). Likewise, it has been stated in O'Neil (2011) that sampling refers to a tiny part representing the quality of the whole. According to Maree (2010), qualitative sampling is normally based on non-probability samples, also known as purposive or convenience sampling. This means that the participants selected for the study have certain characteristics that make them the holders of the data that the researcher wants to obtain, and that participants can be selected on the basis of

availability according to the personal judgement of the researcher (Maree, 2010; O'Neil, 2011).

It was decided to use convenience or purposive sampling in this study, as some of the necessary characteristics of participants had been determined beforehand. Examples of these characteristics are that individuals should be SIEs who move in and out of South Africa, and that individuals should have been working in the host or new country for at least six months to a year.

It should be noted that at one stage I had to resort to a combination of purposive sampling and snowball sampling. The latter is also known as chain referral sampling (Maree, 2010). Snowball sampling is a useful way of gaining access to samples that are not easily accessible and are in some sense hidden in the population. This sampling is done by searching social networks for participants over and above those participants who were already being used (Maree, 2010; O'Neil, 2011).

In the case of qualitative data the information does not necessarily have to be applied to the whole population; smaller studies are rather done in order to obtain in-depth information (Maree, 2010; O'Neil, 2011). Therefore, I did not predict the number of interviews but decided to end the interviews when data saturation occurred – in other words when I could not locate more participants or when the data yielded no new information.

Phase 1b – Contacting participants

Throughout the whole study, quality, rigour (which will be discussed later) and ethics were of the utmost importance. Ethics can be said to be related to morality, in other words what is right and what is wrong. According to Babbie (2008, p. 67), being ethical can be defined as “conforming to the standards of conduct of a given profession or group”.

The ethical process starts from the moment when the researcher starts contacting individuals or any other relevant party of whom permission is needed to conduct the study. All relevant information should be given when confirming a date and time for the interviews to take place (Babbie, 2008). Collecting data from across national borders presents major

challenges. However, in this study personal contacts proved to be valuable to gain access to SIEs. Even though this approach has received a lot of criticism (Creswell, 2009), the difficulties associated with costs, the geographical range and time constraints made it the best option for this study. Thus the choice of the host country (mainly Hong Kong) was made because it was convenient, due to personal contacts. I arranged an interview with anyone who was willing to participate. Participants were contacted by telephone and through the social media, given all the relevant information and asked if they would be willing to participate in this study. Access to three participants was gained through snowball sampling. These individuals were also contacted telephonically.

It was important that the individuals did not have a wrong impression of what the study was about (Babbie, 2008). To prevent any misunderstandings and to ensure richer information, the questions were discussed with the participants before the time. This gave them time to think about their expatriation experiences and to prepare their answers.

Phase 1c – Receiving consent and conducting research ethically

A letter of informed consent (see Appendix A) was given to participants and in all the cases their permission was asked before recording the interview. The researcher also explained how the data would be used (Babbie, 2008) and obtained participants' permission to use the information they provided.

When conducting scientific research there is general agreement about what is proper and what is improper. Proper procedures involve voluntary participation, avoidance of harm, informed consent, no deception of respondents, anonymity, confidentiality, privacy and debriefing of respondents (Babbie, 2008). A short discussion of each of these will follow.

Voluntary participation and avoidance of harm

According to Strydom, Fouché and Delport (2005), participants should be informed prior to the interview of any potential effects that the interview might have on them. This specific study did not hold any potential harm for the participants since it was concerned with their own perceptions and experiences of SIE. Nevertheless, participants were informed that participation was voluntary and they could withdraw from the study at any time during the interview when they deemed it necessary.

Informed consent

Participants were given a letter with full information about the topic under investigation, their voluntary contribution, and the nature of the study.

Deception of participants

There are certain situations in which deception is acceptable, but it is difficult to define the degree of deception. Deception is, for instance, when the researcher withholds information from the participant in order to ensure that the participant does not refuse to participate in the study (Strydom et al., 2005). It is unethical for the researcher to mislead the participant by means of a verbal or written communication. No deception of participants occurred during this study.

Anonymity

Anonymity implies that no one, not even the researcher, will be able to identify the participants after the interviews (Wiles, Charles, Crow, & Heath, 2006). Therefore, the researcher ensured anonymity by using certain interventions, for example, each participant was given a number (e.g. Participant 1), and names and confidential information were cut from the transcriptions.

Confidentiality

Confidentiality is preserved by a researcher when the researcher can identify a person's responses but promises not to do so publicly (Babbie, 2008). This researcher informed participants that responses, but not the sources of these responses, might be made known in public. Information was therefore handled in a confidential manner and privacy was ensured and maintained at all times.

Privacy

The privacy of participants can be affected if hidden tools, such as video cameras, one-way mirrors and microphones, are used. Some researchers are of the opinion that these obscure tools may be used if participants will remain anonymous and will not be exposed to any harm (Strydom et al., 2005). No hidden tools have been used in this study.

Debriefing of respondents

During debriefing, participants have the opportunity to share their experience of and feelings about the study. The aim of debriefing is to reduce and correct problems generated during the study and to use this information for future reference (Babbie, 2008). Participants were given the opportunity to comment on the study, and some of the comments can be seen in Chapter 3.

2.3.2 Phase 2 – Data collection

The purpose of the research has the greatest influence on the researcher's decision to use certain methods of data collection and especially data analysis (Henning et al., 2004). Since the purpose of this study was to explore the push and pull factors as experienced by South African SIEs, qualitative data collection methods were used. From an interpretivist perspective, research techniques can be used to help understand how people interpret and interact within their social lives (Maree, 2010). A qualitative study generally requires the researcher to use multiple sources of data, a method known as triangulation (Henning et al., 2004), and to spend a considerable amount of time in the natural setting gathering the information (Creswell, 2009).

Normally, data for qualitative research is collected by means of observations, interviews (Maree, 2010), in-depth interviews (Ahrens, & Chapman, 2007), documents and audio-visual materials (Creswell, 2009). All of these methods of collecting data are ways to capture 'insider' knowledge, which form part of an interpretivist methodology (Henning et al., 2004). These techniques require the researcher to spend time in direct and personal contact with the participants (Neuman, 2006). For the purpose of this study I made use of primary and secondary data. The primary data included in-depth interviews (verbal data) and documents (non-verbal data) in the form of e-mails, and the secondary data consisted of existing literature. The justification for deciding on in-depth interviews was the exploratory nature of the study. However, some pre-prepared questions (derived from the research questions) were asked to create some order during the interviews. As a novice researcher I had to have a plan to assist me in focussing and to prevent me from leading the participants in their answers.

Phase 2a – Conducting interviews

The main aim of interviews is to be able to see the world through participants' eyes. If participants are asked the right questions, they can be a valuable source of information. Questions can be determined before the interview or can arise spontaneously during the interaction with the participant (Maree, 2010; O'Neil, 2011). Interviews were the best method of inquiry for this specific study, since the researcher was interested in the perceptions and experiences of SIEs. According to Maree (2010, p. 87), interviews can be defined as “a two-way conversation in which the interviewer asks the participant questions to collect data and to learn about the ideas, beliefs, views, opinions and behaviours of the participant”.

Since participants cannot be directly observed in this kind of study, interviews are particularly useful. Furthermore, interviews give the researcher some control over the line of questioning, and participants can provide some historical data as well (Creswell, 2009). Additionally, participants are able to provide in-depth information about their experiences and perceptions with regard to SIE.

Different types of interviews are available, namely, one-on-one, face-to-face and in-person interviews; telephone interviews; focus group and e-mail or Internet interviews (Creswell, 2009). For the purpose of this research study I decided to make use of one-on-one interviews, preferably by way of face-to-face contact. However, one e-mail interview had to be conducted due to unforeseen circumstances and the challenge of the participant's global movements.

It was decided to make use of semi-structured interviews, which generally involve open-ended questions (see Appendix B), since structured interviews leave little room for unanticipated discoveries and since unstructured interviews can be too broad and leave room for digression from the topic (Maree, 2010).

Semi-structured interviews are characterised by a set of predetermined questions; however, they do allow some probing and clarification of answers or other uncertainties (Maree, 2010). Semi-structured interviews require a great deal of attention and focus from the researcher during the course of the interview as the researcher should be able to pick

up and follow up on emerging lines of inquiry that could be relevant to the issue being studied (Maree, 2010; O'Neil, 2011). Questions can also be alternated during the interview (Maree, 2010). Semi-structured interviews have advantages and disadvantages, some of which apply to other types of interviews as well.

Advantages: Semi-structured interviews are normally face-to-face interviews that involve personal contact. This could be advantageous as the participant's body language can be observed and valuable information can be obtained in this way. Also, any uncertainties that might arise between the participant and the interviewer can be clarified immediately. Semi-structured interviews allow the researcher to probe for more suitable answers (O'Neil, 2011).

Disadvantages: Interviews (including semi-structured interviews) generally tend to be time consuming and have cost implications to be taken into consideration (O'Neil, 2011). These disadvantages applied to the sample group in this study. Participants can be difficult to track down and they might not have the time to participate in the interview. So, the researcher will have to wait for an opening in their busy schedules. When the topic under study is sensitive or quite personal, the participant might be reluctant to answer questions truthfully. The collection of valuable data is greatly dependent on the skills of the interviewer. Furthermore, the recording of data has implications, mostly ethical in nature. Although the analysis of data of a semi-structured interview is not as effective as in the case of a structured interview, this analysis is not as time consuming as in the case of an unstructured interview (O'Neil, 2011).

I aimed to conduct the interviews in a natural setting so that participants could be comfortable and relate to the research questions easily. Creswell (2009) expressed the opinion that interview questions should be few in number. Examples of the questions asked during the interviews can be seen in Appendix B. I planned to conduct all the interviews myself, and I took note of the necessity of informing myself about the procedure and the precautions that had to be taken beforehand to ensure high-quality data. Firstly I studied some of the interviewing techniques and tips prescribed by Strydom et al. (2005), and secondly I conducted a pilot interview with a professor at the University of Pretoria to verify that there were no problems and errors that could affect the quality of the data collected.

One participant could not come to South Africa on holiday as planned, and the only alternative was to collect data by e-mail. Three of the participants were interviewed while on holiday in South Africa. Another participant, who had repatriated to South Africa temporarily, could also be interviewed here. The rest of the participants were interviewed in Hong Kong where they worked and lived at the time.

The interviewer-interviewee relationship can be described as a relationship that exists between two or more individuals who are unequal in authority and in ownership of the research process (Henning et al., 2004). Observation is key in the data collection process of qualitative research regardless of the method used, and the researcher is the one who makes these observations (Auriacombe, & Mouton, 2007). How researchers present themselves is determined by the roles that they choose to undertake in the field. Researchers can play different roles: complete participant, participant-as-observer, observer-as-participant and complete observer (Auriacombe, & Mouton, 2007). For the interviews that were conducted in South Africa I chose to play a complete-observer role. In other words, I observed an individual during an interview without becoming part of the process in any way. However, during the interviews in Hong Kong I played a combined role, that of a complete observer as well as of an observer as participant. This had not been planned, yet I found myself identifying with the SIEs. Nevertheless, I still presented myself as the researcher. A brief summary of the sample group and interviews can be seen in Table 2.1 below.

Table 2.1: Summary of sample group and interviews

| Interview | Age and gender | Ethnicity | Place | Date | Duration |
|-------------|----------------|-----------|---------------------------|----------------|---------------|
| Interview 1 | 46, male | Caucasian | South Africa, Randfontein | 3 January 2013 | 34 min 11 sec |
| Interview 2 | 56, male | Caucasian | South Africa, Randfontein | 4 January 2013 | 34 min 54 sec |
| Interview 3 | 45, male | Caucasian | South Africa, Pretoria | 19 March 2013 | 41 min 7 sec |
| Interview 4 | 41, male | Caucasian | South Africa, Krugersdorp | 26 April 2013 | 20 min 12 sec |

| | | | | | |
|-------------|---------------|-----------|-----------------------------|--------------|---------------|
| Interview 5 | 26, male | Caucasian | Hong Kong, Kowloon | 26 May 2013 | 27 min 54 sec |
| Interview 6 | 35, female | African | Hong Kong, Pacific Place | 28 May 2013 | 13 min 50 sec |
| Interview 7 | 37, female | Caucasian | Hong Kong, Causeway Bay | 28 May 2013 | 30 min 48 sec |
| Interview 8 | 31, male | African | Hong Kong, Central | 29 May 2013 | 27 min 19 sec |
| Interview 9 | 30, female | Caucasian | London | 24 June 2013 | (e-mail) |

Phase 2b – Recording and storing of data

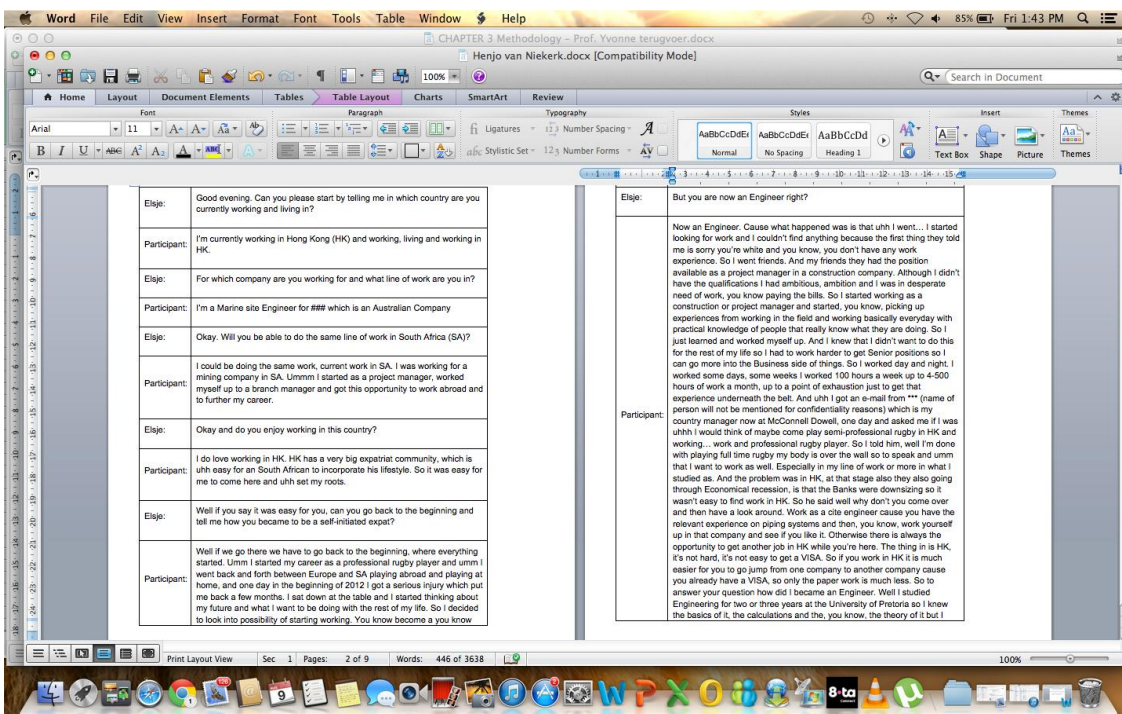
The pilot interview was taped on an audio recorder, which was later found to have malfunctioned. Luckily this happened before the ‘real’ interviews began. Therefore, the real interviews were recorded on an I-phone from where they could be e-mailed to my account immediately afterwards. The interviews could furthermore be stored on I-tunes from where I transcribed them.

2.3.3 Phase 3 – Data analysis

Phase 3a – Transcribing data

After the interviews had been conducted, the data were transcribed. This was done by typing out everything that had been recorded during the interview. An example can be seen in Figure 2.2.

Figure 2.2: Interview transcription snapshot



Phase 3b – Close reading

Henning et al. (2004) expressed the opinion that reading through the data sets helps to form an overview and to understand the context. After having transcribed the interviews I read through the objectives of the study and did a second reading of each of the interview transcriptions. This enabled me to refocus and gain some clarity on the research question, the issues under study and the direction of the research. Thereafter it was possible to start with the coding of the data.

According to Maree (2010, p. 99), qualitative data analysis is typically based on an “interpretative philosophy that is aimed at examining meaningful and symbolic content of qualitative data”. In other words, qualitative data analysis is an attempt by the researcher to make sense of how participants make meaning of a specific phenomenon (Henning et al., 2004; Creswell, 2009). This is best achieved through an inductive analysis of qualitative data (Creswell, 2009; Neuman, 2006), an ongoing process that starts at data collection already (Auriacombe, & Mouton, 2007). Data analysis requires investigative expertise and the ability to capture the meaning of data (Henning et al., 2004). Additionally, data analysis involves inspecting possible relationships between concepts,

constructs or variables, and identifying or isolating any patterns, trends or themes yielded by the data (Mouton, 2005).

As mentioned previously, data analysis is an ongoing process involving continual reflection about the data, asking investigative and logical questions and writing memos throughout the study (Creswell, 2009). Thus, while I was gathering data I started interpreting the information, which understandably influenced my thinking and the way I approached the next interview.

To summarise, data analysis involves the analysis of open-ended data that are collected from the answers participants have given to general questions and other information that they have supplied (Creswell, 2009).

Phase 3c – Coding

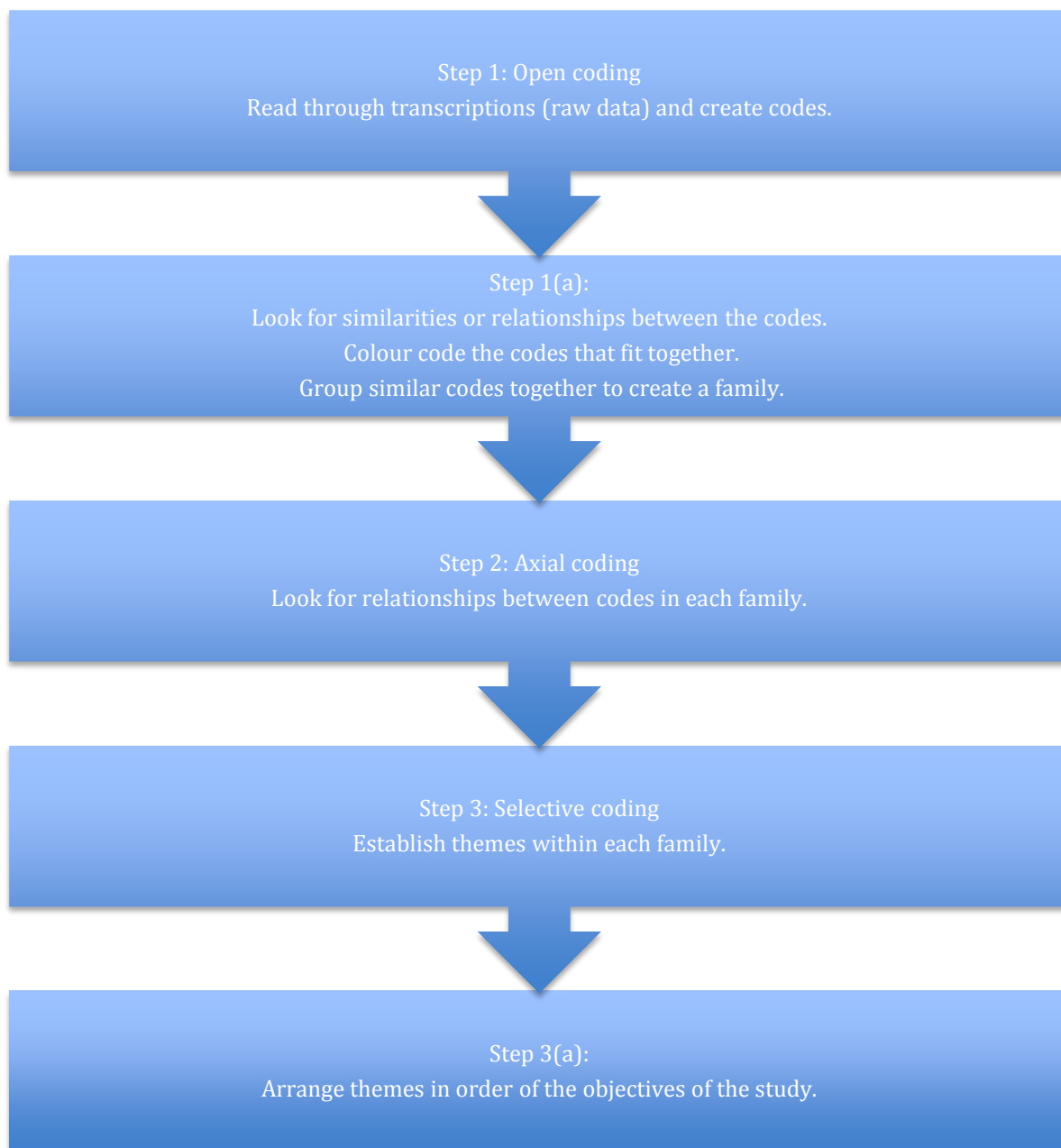
It is important to remember that data analysis is integrated with the research design, data collection, processing and reporting of the results (Maree, 2010). Data analysis “involves ‘breaking up’ the data into manageable themes, patterns, trends and relationships” (Mouton, 2005, p. 108). The different types of data analysis that are available to the researcher is: hermeneutics, content analysis, conversation analysis, discourse analysis and narrative analysis (Maree, 2010), and also grounded theory analysis and global analysis (Henning et al., 2004).

Initially I decided to use content analysis, seeing that it is the preferred choice of beginner researchers, and the data found is known as simple representational information (Henning et al., 2004). Putting the research paradigm into perspective, however, I found it was no longer a plausible option because I was working in an interpretive research paradigm and my research was not aimed at gathering ‘simple’ data. Support for my decision to change strategies was found in the opinion expressed by Schurink and Auriacombe (2009) that the research design should contain the possibility of ongoing changes in the researcher’s ontology and epistemology and consequently the assumptions made in the study. No single technique does it all and by choosing one strategy and sticking to it means that it must serve as an all-purpose vehicle.

Therefore, I decided to resort to a more complex method of data analysis, namely that situated in grounded theory strategies (Henning et al., 2004; Mayring, 2000; Schrink, 2009). Grounded theory can be defined as theory that is inductively derived from the study of the phenomenon it represents (Maree, 2010). This means that good inductive reasoning takes place because multiple examples or data are taken and then narrowed down. Reasoning on a higher level of abstraction may also be included (Henning et al., 2004). I used open coding, axial coding and selective coding in combination with Microsoft Excel to analyse the data obtained during interviews (see Figure 2.3 and the subsequent detailed discussion).

The steps identified by Tesch (1990) and Creswell (2009) were adapted somewhat and combined with the grounded theory analysis process. Grounded theory analysis is concerned with flexible strategies for focussing on and expediting qualitative data collection and analysis. Inductive steps are provided to guide the researcher from studying concrete realities to rendering a conceptual understanding of them (Henning et al., 2004), in other words it leads the researcher to coding and then the categorisation of data (Maree, 2010). The steps depicted in Figure 2.3 below represent the detailed coding plan that I used.

Figure 2.3: The data coding plan

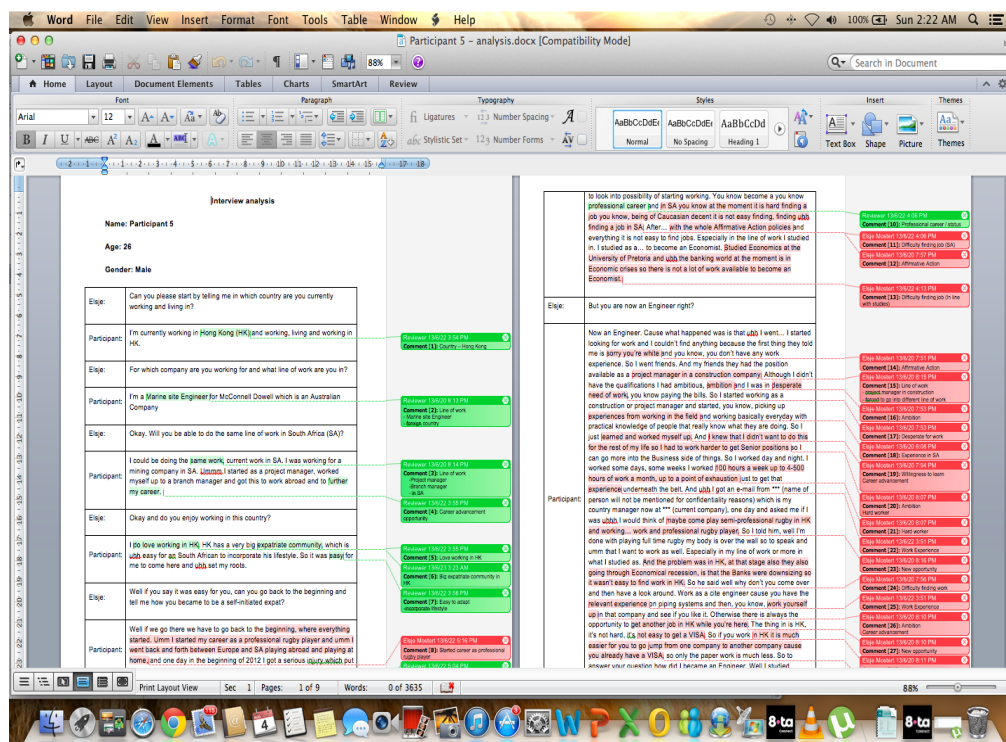


Each of the steps depicted in Figure 2.3 will be discussed. Additionally, the researcher will include a screen shot at each step to show how it was done and to provide evidence of credibility and trustworthiness.

Step 1: Open coding

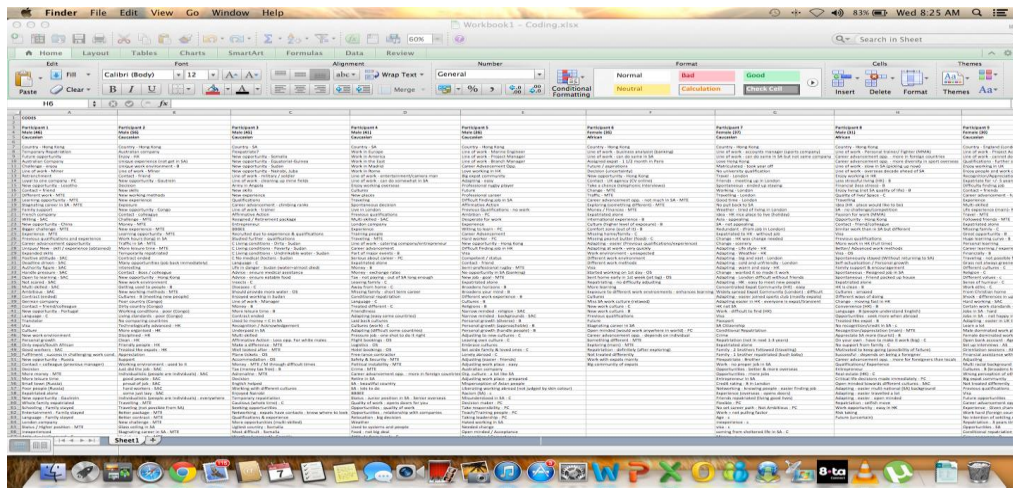
In essence, open coding refers to the naming and categorisation of phenomena through close examination of the data (Henning et al., 2004). In other words, it involves generating categories of data (Creswell, 2009) or creating segments and concepts out of raw data. Then data are compared and similar incidents are grouped together and given the same conceptual label (Henning et al., 2004). Mayring (2000) suggested that open coding may be done line by line, which is time consuming but most reproductive (Henning et al., 2004). I decided to analyse the data sentence by sentence even though it would be time consuming so that I could maintain the context and meaning of the participants' statements. An illustration of this can be seen in Figure 2.4 below.

Figure 2.4: Open coding of data



After analysing the entire set of interview transcriptions, the codes were captured on an Excel spreadsheet (see Figure 2.5) to promote understanding. I called it my 'code book' because it contained all the codes that had emerged from the data.

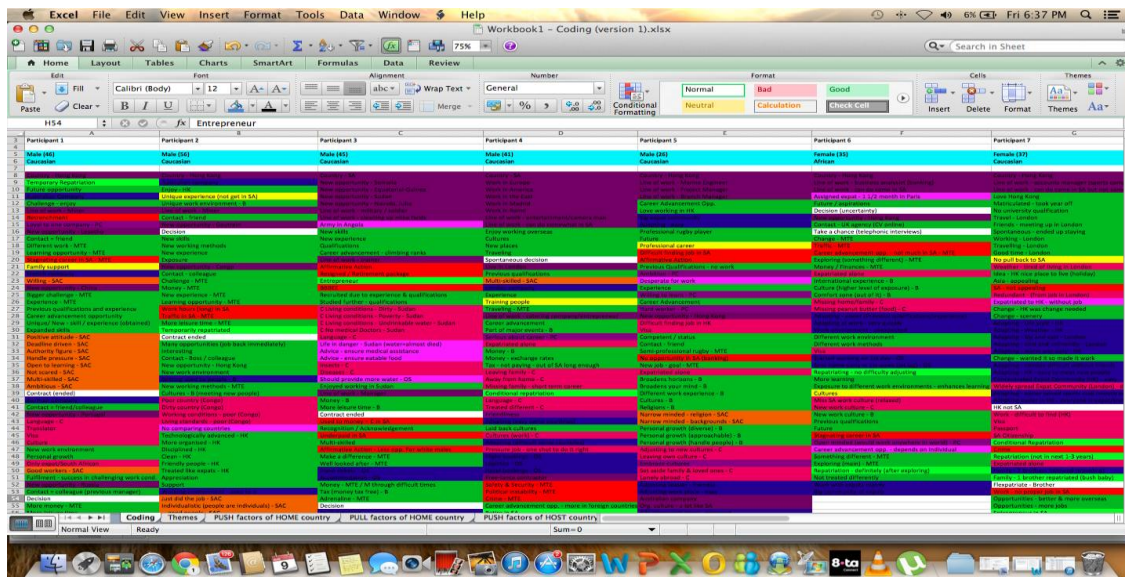
Figure 2.5: Code book



Step 1(a)

As can be seen in Figure 2.5, the codes were indicated separately under each participant in the code book as they occurred. I studied the codes, while keeping my research objectives and paradigm in mind, to see what concepts emerged from the data. The codes were then colour coded according to their relationship (see Figure 2.6).

Figure 2.6: Colour-coded code book



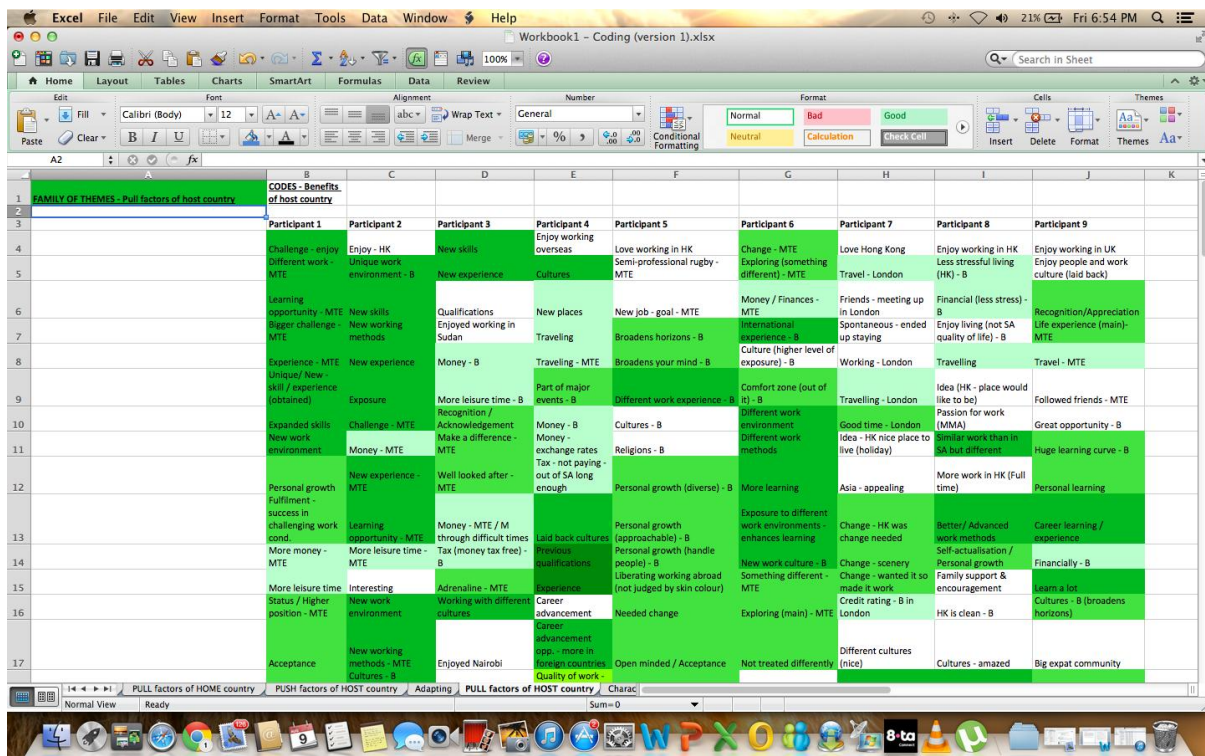
I created a different tab for each colour and grouped the codes according to colour to create 'families'. In other words, I gave a collective name to each tab that identified each family of codes. For example, the dark-green codes were grouped on one sheet and represented a 'family' labelled 'Pull factors to host country', and the light-green codes were

grouped on a separate sheet and represented a ‘family’ labelled ‘Pull factors to home country’ (see Figure 2.7), which will be discussed next.

Step 2: Axial coding

According to Creswell (2009), axial coding involves selecting one of the categories created in open coding and positioning it within a theoretical model. In other words, axial coding is the process of grouping and categorising related codes and seeking relationships between these categories. In the case of this study where relationships are the focus of this step in the data analysis process, relationships can be uncovered by asking where, how, when, why and who questions (Henning et al., 2004).

Figure 2.7: Family of pull factors to host country



| | Participant 1 | Participant 2 | Participant 3 | Participant 4 | Participant 5 | Participant 6 | Participant 7 | Participant 8 | Participant 9 |
|----|---|-----------------------------|---|---|---|---|--|---|---|
| 1 | Challenge - enjoy | Enjoy - HK | New skills | Enjoy working overseas | Love working in HK | Change - MTE | Love Hong Kong | Enjoy working in HK | Enjoy working in UK |
| 2 | Different work environment - B | Unique work environment - B | New experience | Cultures | Semi-professional rugby - MTE | Exploring (something different) - MTE | Travel - London | Less stressful living (HK) - B | Enjoy people and work culture (laid back) |
| 3 | Learning opportunity - MTE | New skills | Qualifications | New places | New job - goal - MTE | Money / Finances - MTE | Friends - meeting up in London | Financial (less stress) - B | Recognition/Appreciation |
| 4 | Bigger challenge - MTE | New working methods | Enjoyed working in Sudan | Traveling | Broadens horizons - B | International experience - B | Spontaneous - ended up staying | Enjoy living (not SA quality of life) - B | Life experience (main) - MTE |
| 5 | Experience - MTE | New experience | Money - B | Traveling - MTE | Broadens your mind - B | Culture (higher level of exposure) - B | Working - London | Travelling | Travel - MTE |
| 6 | Unique / New skill / experience (obtained) | Exposure | More leisure time - B | Part of major events - B | Different work experience - B | Comfort zone (out of it) - B | Travelling - London | Idea (HK - place would like to be) | Followed friends - MTE |
| 7 | Expanded skills | Challenge - MTE | Acknowledgment | Money - B | Cultures - B | Different work environment | Good time - London | Passion for work (MMA) | Great opportunity - B |
| 8 | New work environment | Money - MTE | Make a difference - MTE | Money - exchange rates | Religions - B | Different work methods | Idea - HK nice place to live (holiday) | Similar work than in SA but different | Huge learning curve - B |
| 9 | Personal growth | New experience - MTE | Well looked after - MTE | Tax - not paying - out of SA long enough | Personal growth (diverse) - B | More learning | Asia - appealing | More work in HK (Full time) | Personal learning |
| 10 | Fulfillment - success in challenging work (and) | Learning opportunity - MTE | Money - MTE / M through difficult times | aid back cultures | Personal growth (approachable) - B | Exposure to different work environments - enhances learning | Change - HK was change needed | Better / Advanced work methods | Career learning / experience |
| 11 | More money - MTE | More leisure time - MTE | Tax (money tax free) - B | Previous qualifications | Personal growth (handle people) - B | New work culture - B | Change - scenery | Self-actualisation / Personal growth | Financially - B |
| 12 | More leisure time | Interesting | Adrenaline - MTE | Libertarianism | Liberating working abroad (not judged by skin colour) | Something different - MTE | Change - wanted it so made it work | Family support & encouragement | Learn a lot |
| 13 | Status / Higher position - MTE | New work environment | Working with different cultures | Career advancement | Needed change | Exploring (main) - MTE | Credit rating - B in London | Family support & encouragement | Cultures - B (broadens horizons) |
| 14 | Acceptance | New working methods - MTE | Enjoyed Nairobi | career advancement tips - more in foreign countries | Open minded / Acceptance | Not treated differently | Different cultures (nice) | HK is clean - B | Big expat community |
| 15 | | Cultures - B | Quality of work | | | | | | |

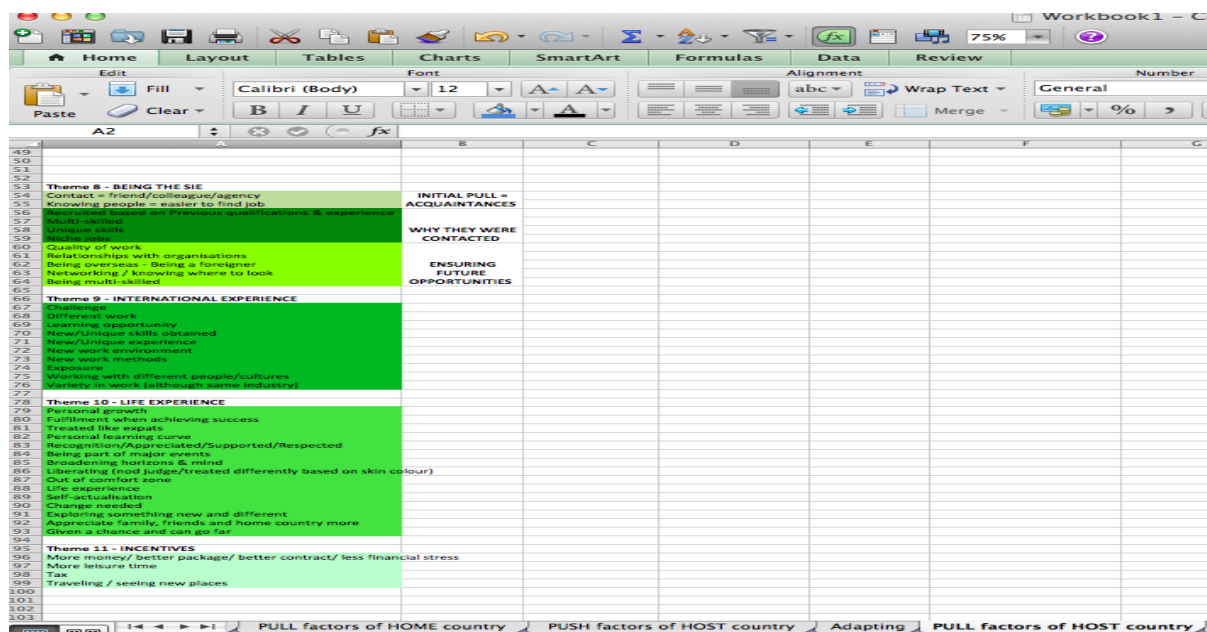
The analysis during axial coding takes place on two levels: the actual words of the respondents are taken and conceptualised by the researcher (Henning et al., 2004; Mayring, 2000). Ultimately it means putting the parts of data that have been identified and separated in open coding back together again in new ways. The first time round I ended up with more than 22 themes with many different codes that fitted each of these themes.

After a lengthy discussion with my study supervisor I decided to refine the process. The approach I used the second time was to look for commonalities between the codes of each participant. I decided to work with a 45% relationship, in other words, if four out of nine participants had mentioned an aspect, it became part of a theme.

Step 3: Selective coding

Selective coding involves writing the final themes of the data set (Henning et al., 2004) and then extract common themes and a story from the interconnection of these categories of themes (Creswell, 2009). In this step the researcher aims to present a pattern of related themes (Henning et al., 2004). Figure 2.8 gives some of the themes that emerged from the family of pull factors to the host country.

Figure 2.8: Themes that emerged from family of pull factors to host country

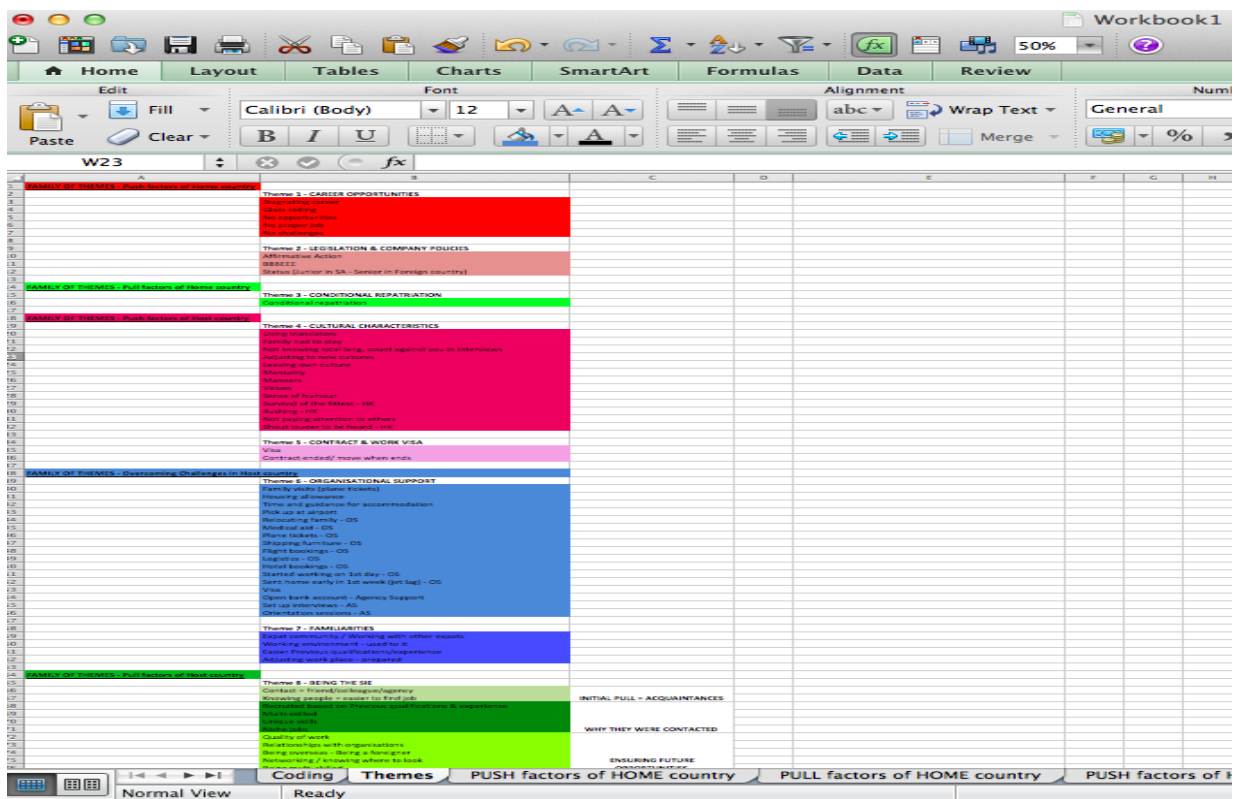


| | A | B | C | D | E | F | G |
|-----|---|--|------------------------------|------------------------------|----------|------------------------------|---|
| 49 | | | | | | | |
| 50 | | | | | | | |
| 51 | | | | | | | |
| 52 | | | | | | | |
| 53 | | Theme 8 - BEING THE SIE | | | | | |
| 54 | | Contact = friend/colleague/agency | INITIAL PULL = | | | | |
| 55 | | Knowing people = easier to find job | ACQUAINTANCES | | | | |
| 56 | | Respected based on Previous qualifications & experience | | | | | |
| 57 | | Multi-skilled | | | | | |
| 58 | | Unique skills | WHY THEY WERE | | | | |
| 59 | | Be the go-to | CONTACTED | | | | |
| 60 | | Quality of work | | | | | |
| 61 | | Relationships with organisations | | | | | |
| 62 | | Being overseas - Being a foreigner | ENSURING | | | | |
| 63 | | Networking / Knowing where to look | FUTURE | | | | |
| 64 | | Being multi-skilled | OPPORTUNITIES | | | | |
| 65 | | | | | | | |
| 66 | | Theme 9 - INTERNATIONAL EXPERIENCE | | | | | |
| 67 | | Challenge | | | | | |
| 68 | | Different work | | | | | |
| 69 | | Learning opportunity | | | | | |
| 70 | | New/Unique skills obtained | | | | | |
| 71 | | New/Unique experience | | | | | |
| 72 | | New work environment | | | | | |
| 73 | | New work methods | | | | | |
| 74 | | Exposure | | | | | |
| 75 | | Working with different people/cultures | | | | | |
| 76 | | Meeting people (through same industry) | | | | | |
| 77 | | | | | | | |
| 78 | | Theme 10 - LIFE EXPERIENCE | | | | | |
| 79 | | Personal growth | | | | | |
| 80 | | Fulfillment when achieving success | | | | | |
| 81 | | Treated like experts | | | | | |
| 82 | | Personal learning curve | | | | | |
| 83 | | Recognition/Appreciated/Supported/Respected | | | | | |
| 84 | | Being part of major events | | | | | |
| 85 | | Broadening horizons & mind | | | | | |
| 86 | | Liberating (not judge/treated differently based on skin colour) | | | | | |
| 87 | | Out of comfort zone | | | | | |
| 88 | | Life experience | | | | | |
| 89 | | Self-actualisation | | | | | |
| 90 | | Change needed | | | | | |
| 91 | | Exploring something new and different | | | | | |
| 92 | | Appreciate family, friends and home country more | | | | | |
| 93 | | Given a chance and can go far | | | | | |
| 94 | | | | | | | |
| 95 | | Theme 11 - INCENTIVES | | | | | |
| 96 | | More money/ better package/ better contract/ less financial stress | | | | | |
| 97 | | More leisure time | | | | | |
| 98 | | Tax | | | | | |
| 99 | | Traveling / seeing new places | | | | | |
| 100 | | | | | | | |
| 101 | | | | | | | |
| 102 | | | | | | | |
| 103 | | | | | | | |
| | | | PULL factors of HOME country | PUSH factors of HOST country | Adapting | PULL factors of HOST country | |

Step 3(a)

Lastly I entered all the themes that had emerged from the different families on a separate spreadsheet, which I labelled 'Themes'. I then looked at the objectives of the study again and arranged the themes accordingly, which can be seen in figure 2.9.

Figure 2.9: Selective coding of data



The themes that emerged from the selective coding will be discussed in more detail in the following section. Table 2.2 below displays the themes that emerged. The table also provides the codes that made up each theme along with the family to which they belonged. One of the themes (Push factors from host country) had a subtheme, namely, coping with push factors/challenges, which is displayed in Table 2.3.

Table 2.2: Themes from selective coding

| Families (Open coding) | Codes (Axial coding) | Theme (Selective coding) |
|---|--|---|
| Push factors of home country (SA) | Stagnating career Glass ceiling No opportunities No proper job No challenges | Career opportunities |

| | | |
|---|--|---|
| | <p>Status (position in company)</p> <p>Affirmative action</p> <p>BBBEE</p> | Legislation and company policies |
| Pull factors of home country (SA) | <p>Conditional repatriation</p> | Conditional repatriation (to SA) |
| <p>Push factors of host country</p> <p>(See Table 2.3 for subtheme)</p> | <p>Language</p> <p>Culture</p> <p>Missing loved ones at home</p> | The lonely foreigner |
| | <p>Visa</p> <p>Contract ended</p> | Contract and work permit |
| Pull factors of host country | <p>Contact = friend/colleague/agency</p> <p>Knowing people = easier to find job</p> <p>Recruited based on previous qualifications and experience</p> <p>Multi-skilled</p> <p>Unique skills</p> <p>Niche jobs</p> <p>Quality of work</p> <p>Relationships with organisations</p> <p>Being overseas – being a foreigner</p> <p>Networking / knowing where to look</p> <p>Being multi-skilled</p> | Being the SIE |
| | <p>Challenge</p> <p>Different work</p> <p>Learning opportunity</p> <p>New/Unique skills obtained</p> <p>New/Unique experience</p> <p>New work environment</p> <p>New work methods</p> <p>Exposure</p> <p>Working with different cultures</p> <p>Variety in work (although same industry)</p> | International experience |

| | | |
|--|---|-------------------------------|
| | <p>Personal growth</p> <p>Fulfilment when achieving success</p> <p>Treated like expats</p> <p>Personal learning curve</p> <p>Recognition/Appreciation</p> <p>Supported/Respected</p> <p>Being part of major events</p> <p>Broadening horizons and mind</p> <p>Liberating (not judged/treated differently based on skin colour)</p> <p>Out of comfort zone</p> <p>Life experience</p> <p>Self-actualisation</p> <p>Change needed</p> <p>Exploring something new and different</p> <p>Appreciate family, friends and home country more</p> <p>Given a chance and can go far</p> | <p>Life experience</p> |
| | <p>More money / better package / better contract / less financial stress</p> <p>More leisure time</p> <p>Tax</p> <p>Travelling / seeing new places</p> | <p>Incentives</p> |

Table 2.3: Subtheme – Coping with challenges in host country

| | | |
|--|---|-------------------------------|
| Coping with challenges in host country | Family visits Flight bookings and tickets Housing allowance and guidance Pick up at airport Relocate family and home Medical aid Visa Open bank account Set up interviews Orientation sessions | Organisational support |
| | Expat community Working with other expats Used to working environment Previous qualifications / experience | Familiarities |

2.3.4 Phase 4 – Literature review

Linking findings with literature

The decision to do a comprehensive literature review only after the data analysis was based on the fact that I wanted themes to emerge solely from the data, without contamination by my thinking processes. In this way the literature does not guide the study but rather becomes an aid once themes have been identified. Creswell (2009) supported this notion by stating that presenting the literature review at the end of the study is a more suitable approach for inductive research. Thus the literature review will become a basis for comparing and contrasting findings, an approach which is linked to the approach followed in the interpretive paradigm used in this study. In contrast to quantitative research, qualitative research is not restricted to any particular stage of research (Schrink, 2009).

2.4 DEMONSTRATING QUALITY AND RIGOUR OF THE PROPOSED RESEARCH DESIGN

When conducting qualitative studies, researchers should ensure trustworthiness of data. Trustworthiness can be confirmed in many ways, one of which is using multiple methods of data collection (Maree, 2010). As mentioned previously, I made use of interviews and e-mails, with interpretations, as sources of data collection. Furthermore, I aimed to ensure that the data were collected in the same way throughout the study, which is also a requirement for the confirmation of trustworthiness. In addition, I allowed participants and any other individual who could have an interest in the study, to give comments and opinions on the findings, interpretations and conclusions reached (Maree, 2010).

Trustworthiness can be established through four criteria: credibility, transferability, dependability and conformability.

To increase *credibility* the researcher verified the data obtained by having casual conversations with the participants after the interviews. This is also known as prolonged engagement (Maree, 2010).

Transferability can be ensured by using thick descriptions in the study, in other words by providing as much detail as possible so that another person can replicate the study. It is important for the researcher to determine at the beginning of the research process how to verify the data. Replication in qualitative research is difficult, if at all possible (Maree, 2010; Schurink, & Auriacombe, 2009). Because human nature is dynamic the same results will not be obtained through replication. Therefore, the only thing I could do was to attempt to ensure that the interpretations of the results obtained during the study were congruent with reality.

Dependability and conformability are important for the raw data, audit trail, data reconciliation and synthesis products, process notes and any materials relating to intentions and dispositions. An independent coder can also be provided with some of the raw data and the objective of the study and asked to code the data to see if similar results

are found (Maree, 2010; Schurink, & Auriacombe, 2009). In this study this was done together with my study supervisor, Professor Yvonne du Plessis.

Participants' words that were quoted in the study were given careful consideration in view of the importance to maintain participants' confidentiality and anonymity. To improve the reliability and understanding of the findings of the study, I listed all the limitations of the study.

2.5 CONCLUSION

To conclude, even though the qualitative research design of each individual qualitative research study is unique (Watt, 2007) there should still be some relationship between studies' theoretical frameworks, research designs, strategies, methodologies, data collection methods and analyses.

In Chapter 2 I attempted to depict a decision trail in a systematic way by referring to appropriate literature on research methodology, as well as by describing the research process from the start until the submission of the dissertation. Because qualitative research is about having an in-depth understanding of a certain phenomenon, I avoided making generalisations. Furthermore, I attempted to present an adequate representation of steps taken and decisions made with the aim to illustrate my effort to ensure credibility and rigour throughout the process of data collection and analysis.

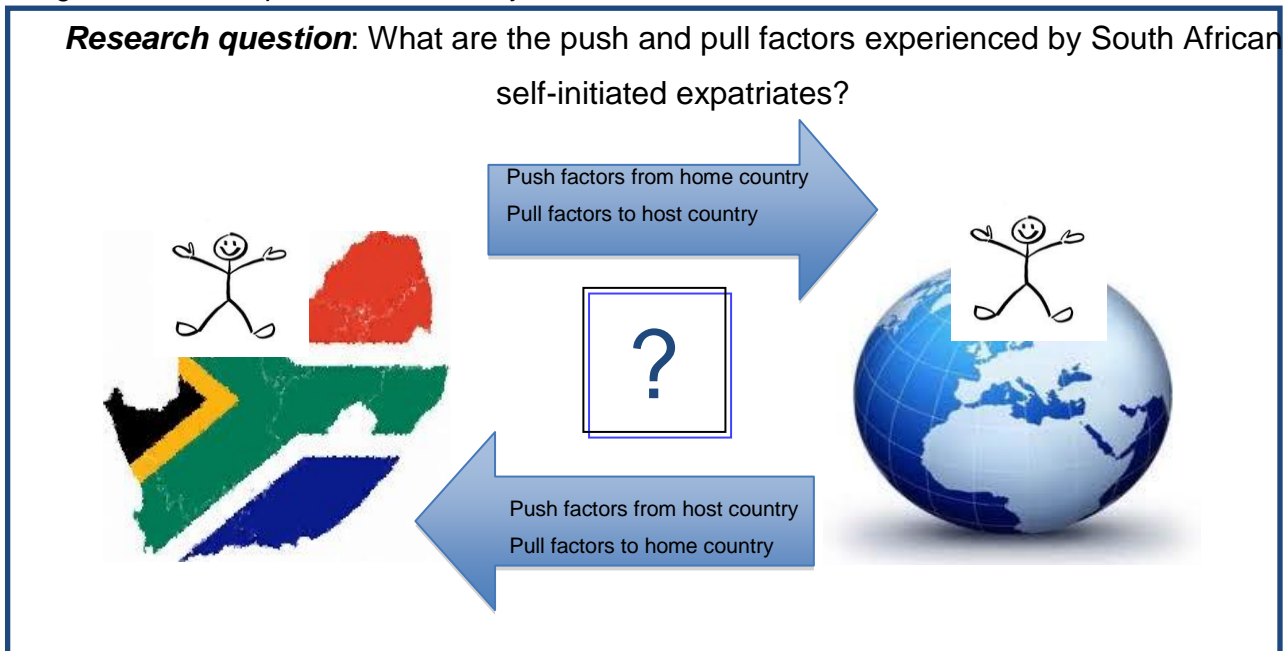
Maree (2010) has warned researchers to be careful about bias, seeing that the more involved the researcher becomes, the easier it is for bias to slip in. No matter how objective the researcher tried to stay in this research study, bias was most probably present. Thus it can be concluded that another researcher with a different range of knowledge and experience, as well as different assumptions, would probably have found different results.

CHAPTER 3: FINDINGS AND DISCUSSION

3.1 INTRODUCTION

In Chapter 1 I included a figure to give the reader a visual understanding of what my research study is about and of the question it aims to answer. This figure, which depicts SASIE (the South African self-initiated expatriate) who journeys between the home country (South Africa) and the host country (foreign country), is reproduced below as Figure 3.1, in order to once again highlight the objectives of the study before exploring the findings.

Figure 3.1: Conceptualisation of study



Chapter 2 presented a discussion of the data collection and data analysis journey taken in an effort to answer the research question. Thus, it brings me to Chapter 3, the aim of which is to see whether some answers to the questions will surface. This study is exploratory and aims to identify and describe the subgroups or themes that emerge from the data. Therefore, this chapter will aim to answer the main research question, which is: What are the push and pull factors experienced by South African self-initiated expatriates?

In Chapter 2 a representation of the families and themes that have emerged from the data has been given in Table 2.2, and Table 2.3 represents the subtheme that has emerged, namely: Coping with challenges in the host country. Chapter 3 ties in with Chapter 2 with a discussion of each of these themes. The themes will be discussed in an order that is appropriate to the story of SASIE (see Figure 3.1).

Firstly, I will look at SASIE when the person is in South Africa, and determine what the factors are that are pushing the person away from South Africa. Secondly, I want to determine the counterparts of the factors, in other words the factors that are pulling the person to the host country. Some of the questions to be asked are the following: Once SASIE is in the host country, what are the challenges that are faced there? Are any of these reason enough to repatriate to the home country (South Africa) permanently? Therefore, I also want to determine whether there are any push factors to return from the host country to South Africa, and to explore these. Fourthly, if there are no push factors to return from the host country to South Africa, how does SASIE manage possible challenges? And lastly, I would like to determine whether there are any pull factors back to South Africa, and, if any, to explore them.

By looking at the story of SASIE it will be possible to answer the main research objectives of the study (set out in Chapter 1), namely to –

- determine, explore and understand the **push** factors of the *home country* (South Africa) **and** the *host country* (foreign country) as experienced by South African SIEs; and
- determine, explore and understand the **pull** factors of the *home country* **and** the *host country* as experienced by South African SIEs.

Before proceeding it is necessary to understand what is meant by push and pull factors. In this study push factors include any negative elements or challenging factors that contribute or can contribute to a SASIE's decision to expatriate to a host country or repatriate to the home country. Conversely, pull factors are any positive elements or beneficial factors that contribute or can contribute to a SASIE's decision to expatriate to a host country or repatriate to the home country. While keeping these two definitions in mind, the discussion of the themes that have emerged will continue.

3.2 EMERGING THEMES

Even though this study's sample group are all SIEs, they should not be seen as homogeneous. The literature mentions that SIEs are a heterogeneous group (Suutari, & Brewster, 2000), therefore they should be treated as unique individuals to whom different push and pull factors or reasons and motivations apply that make them decide to expatriate or repatriate temporarily. Nevertheless, most of the factors that the individuals in this study had in common contributed to the emerging themes collectively but not generally.

According to Baxter and Eyles (1997), one should include verbatim quotations in order to reveal how meanings are expressed in participants' own words rather than in the words of the researcher. Therefore, I will repeat the statements and remarks that participants made during the interviews word for word, but mostly only extracts of these that substantiate or summarise the findings the best will be included as evidence.

Five families of themes emerged and were labelled as follows:

- Push factors of home country (SA)
- Pull factors of host country
- Push factors of host country
- Coping with push factors / Adjusting
- Pull factors of home country (SA)

From each of these families certain subthemes emerged, and these will now be discussed.

3.2.1 Push factors of home country (SA)

The story of SASIE begins in South Africa, where, it seems, certain factors do indeed cause a SASIE some dissatisfaction and contribute to the decision to go abroad. The common factors that the participants in this study shared included lack of career opportunities, legislation and company policies.

Theme 1 – Career opportunities

From the data analysis it became apparent that the majority of participants viewed South Africa as having significantly fewer career opportunities, more specifically career advancement opportunities, than foreign countries. The literature suggests that the attractiveness of international employment is raised with the increase of unemployment in home countries. Furthermore, tax levels combined with a lack of job opportunities at home will increase individuals' search for alternative careers outside the home country, especially if those individuals are highly skilled and trained (Suutari, & Brewster, 2000). One of the participants in this study, however, stated that career advancement was dependent on the individual and what that individual wanted, while the rest of the sample group did not seem to agree. The literature has further reported that external markets, e.g. job related promotions, also play a role in career advancement (Maharaj, 2011), and these factors cannot be controlled by the SIEs. Nevertheless it seems as if there are more career advancement opportunities in foreign countries than in South Africa, as it appears like South Africa focuses more on experience than the potential of the individual.

Participant 9: “Yes, in the UK they are willing to give you a chance to gain experience even if you don't have the experience they are looking for. If you work hard and prove yourself, you can go far. Where in South Africa, if you don't have the experience required they will not give you an opportunity to move to a different department without the experience.”

Only one of the participants mentioned that South Africa provided young people with great learning opportunities, specifically in the mining industry, but that the younger generation was not willing to learn.

Additionally, some participants indicated that they had stagnated in their careers and had hit a glass ceiling in terms of their learning and the experience gained in their current jobs at that point.

Participant 2: “I have been doing the same job in the mines since I actually started in the mine ... and it is basically the same thing all over every day. Where on contract work, it is different types of jobs that you get, different things to do ...”

Participant 6: “... the trading platform which I've been working on, there were not a lot of banks that were using it at the time. At home I was not sure where I would be going if I left ### bank ...”

Furthermore, the majority of the participants felt that they were underpaid and unappreciated in South Africa and did not receive any or enough recognition for their unique skill set, knowledge and experience.

Participant 1: “South Africa, they must look at it, because the guys don’t earn so much money for the work they do ...”

Participant 3: “Ons wens ons kon die salaris hier binnekant verdien vir ons kennis wat ons het en ek wens die regering kan ons aanwend vir dit wat ons ken en ons ‘knowledge’. Ek bedoel, van ons is ‘multi-skilled’; ek het ses kwalifikasies in rigtings wat ek kan ingaan.”

[We wish we could earn the salaries in South Africa for the knowledge that we have and I wish the government would utilise us for the knowledge that we have. I mean, some of us are multi-skilled; I have six qualifications in directions that I can go into.]

Participant 8: “Like when you’re home, you’re local all the same. It doesn’t matter how qualified you are, you know what I mean. Or how special, you know. You are just out there and no one is gonna give you credit, you know.”

Participant 9: “I still really work hard but they [host country/organisation] appreciate what you do a lot more.”

An interesting opinion expressed by one of the participants was that no proper jobs were available to South Africans, especially those without a tertiary education, but when you were an entrepreneur you had a better chance of success in South Africa.

Participant 7: “I think opportunities overseas are, for me, seem better. I ... there are probably more jobs available. I think, South Africa, if you want to make your own money and run your own business it is a good place to do that and there are lots of pockets of money to be made, I think.”

However, two of the interviewees had been entrepreneurs and had to close their businesses because of, according to them, a lack of opportunities combined with the legislation in South Africa. This brings us to the second push factor from the home country.

Theme 2 – Legislation and company policies

A major push factor for the majority of the sample group was legislation and company policy. This could be due to the fact that the majority of the group were Caucasian (white

South Africans). Still, this factor seemed to be a common one, therefore it cannot simply be labelled ‘a different factor’, and it has to be mentioned specifically.

The legislation and company policy the participants referred to relate to employment equity and broad-based black economic empowerment (BBBEE), which most of the participants called affirmative action. These policies were indicated by SASIEs as major factors that made career opportunities in South Africa almost impossible for them. Because the South African population was separated and isolated for years before democratisation in 1994, laws were passed after 1994 to integrate individuals from all cultural backgrounds in order to establish a diverse and equally treated workforce in organisations (Finnemore, 2009). However, the participants’ remarks might indicate that there is a lack of cultural awareness in South African organisations (Mayer, & Louw, 2011).

Interestingly enough, I never asked any of the participants whether legislation played a role in their decision to expatriate, but the majority mentioned that it had. I should, however, mention that it seemed as if it was a very sensitive and uncomfortable topic for participants to talk about. In most instances I sensed they were consciously trying to phrase their sentences carefully, but it was clear that it was something they felt strongly about. Maybe some of the participants felt ‘safe’ to speak from the heart because the interviewer was also Caucasian.

Participant 5: “... being of Caucasian descent it is not easy finding, finding, uh, finding a job in SA ... with the whole affirmative action policies and everything, it is not easy to find jobs ... first thing they told me is, sorry you’re white and, you know, you don’t have any work experience ...”

Participant 3: “... die Regering begin al hoe meer, h’m-’m, wit mense uitdryf, wit mans veral, uit die poste uit en, ja, die regstellende aksies wat plaasvind ...”

[... the government is starting to drive out, uh, white people more and more, especially white males, out of their jobs, and, yes, the affirmative action that is taking place ...]

One of the participants also mentioned that BBBEE and affirmative action legislation had a big influence on South African company policies, and this made it difficult for him to return to South Africa. According to the literature, the 1994 democratic election have brought about a lot of changes in the work environment as well as in employment laws (Nel, Kirsten, Swanepoel, Erasmus, & Poisat, 2008), and organisations have to adhere to all

sorts of legislations as well as manage the socio-historical legacies of apartheid and issues related to diversity (Mayer, & Louw, 2011). Currently, this participant occupies a senior position overseas – in South Africa he will have to step into a junior position and work himself up again. It seems that the situation in South Africa (characterised by misunderstandings between people of different cultural backgrounds and the existence of a lot of negative emotions), which can be described as the legacy of apartheid, does have an influence on peoples' decision to expatriate to foreign countries.

Participant 5: “Yes, I wouldn't say racism is still *not* a factor, it will always be a factor, that's how people are genetically engineered. I wouldn't say it's right, it's how people have been their whole life, like, and it's wrong, but in South Africa it's a much bigger challenge ... I hated working in South Africa, all that hatred between whites and blacks. Especially with, you know, apartheid being done 20 years ago, I mean what are we working now for? What are we, you know, standing now for? So, I also needed a change in that aspect.”

Previous studies found that participants often define cross-cultural conflicts as 'cross-racial' conflicts. In other words, conflicts are based on racial rather than on cultural constructions, and in South Africa this is fuelled by the country's history (Mayer, & Louw, 2011). Maybe the assumption can be made that this is only applicable to the Caucasian participants; however, I would suggest that further research on this topic be done before such an assumption is affirmed. For example, research might reveal that South African legislation might have a negative impact on previously disadvantaged people as well in that they are falsely perceived as 'quota' appointments and not as people who have legitimately earned their positions. Furthermore, research can be done on the implications and impact of affirmative action and BBBEE on organisations and the South African economy, seeing that other researchers have also questioned whether these policies have been effective and whether the legislation has realised its noble intent (Nienaber, 2007). Nevertheless, this is not the focus of this study and it only had to be mentioned because it was one of the major push factors raised by the specific sample group. Other push factors also played a role, for example crime, corruption, political instability and the South African economy, but these were indicated as being of lesser importance.

To conclude, the literature suggests that SIE involves escaping from negative working situations, and the decision to expatriate is connected to the pre-expatriation environment. Furthermore, SIE can also be perceived as an escape from the alleged dullness experienced in the home country as well as a desire to seize an opportunity for change

(Richardson, & Mallon, 2005; Richardson, & McKenna, 2002). Those individuals whose primary motive for SIE is the lack of job opportunities at home do not seem to be influenced by whether they are in the early, or the middle or the more experienced phases of their careers (Suutari, & Brewster, 2000), which was the finding in this research study as well.

Even though the SASIEs in this study indicated dissatisfaction with the above-mentioned factors, interestingly enough it seemed that they would have ‘coped’ with them if there had been no pull factors to the foreign country. The majority of the sample group had been approached (headhunted) by an external party, which created the opportunity to expatriate. The pull factors of the host country will be discussed next.

3.2.2 Pull factors of host country

The researcher made the assumption that the main pull factors would probably be related to career and financial matters. Although career and finances did form part of the pull factors there were more reasons why SIEs opted to expatriate. The literature also suggests that career and work are almost always secondary objectives when deciding to expatriate, at least in the beginning (Inkson, & Myers, 2003).

The themes that emerged as pull factors to host countries are: being SIEs, international experience, life experience and incentives.

Theme 3 – Being SIEs

It was found in the literature that individuals tended to save money to finance the planned overseas trip, to quit their job and to set off independently (Inkson, & Myers, 2003). Similarly, Inkson et al. (1997) stated that a job in a new host company might sometimes be pre-arranged, but most often it will not be.

I found that the above statements did not hold true for all SASIEs – only two of the participants ended up going overseas after having saved some money. Their goal was to travel, but they stayed in the host country in the end. This supports the opinion of Suutari

and Brewster (2000) that younger and often less educated individuals might leave for overseas without having a pre-arranged job. Nevertheless, the majority of the sample group had pre-arranged jobs when they left for the host country. In accordance with the finding of Suutari and Brewster (2000), this might be due to the fact that most of the participants either had a higher educational level, knowledge and skills or more seniority in years, which would probably make them more career driven and could also account for their arranging a job before going overseas. A study conducted by Ainuddin and Lily (2012) found that SIEs tend to be older individuals, which is in line with the finding of this study.

The reason for calling this theme 'being SIEs' is because the initial pull to the host countries for all the participants in this study was through either a friend or friends, a colleague, an ex-manager or an agency, owing to the unique attributes of SASIE. In contrast to the literature that asserts that the initiative for SIE comes from the individual (Inkson et al., 1997), the majority of the participants did not decide to go and work abroad on the spur of the moment. Yes, it is true that the individual made the final decision, but someone else had 'planted the seed' for that person to start considering SIE and weighing up the options.

It should be noted that even though the majority of this sample group had an acquaintance who had 'planted the seed', they had *not* been randomly selected for their jobs. Each SASIE had been contacted for a reason, for having a 'special something' which had made that SASIE the perfect candidate for the job – thus they had been headhunted. One of the characteristics that the majority of the participants had in common was that they were multi-skilled or had a 'special something' that distinguished them from the rest. The literature has found that SIEs are generally represented at all organisational levels and that they commonly regard themselves as experts (Inkson, & Myers, 2003; Richardson, & Mallon, 2005), a finding which was corroborated in this study – at least three of the participants referred to their line of work as specialised or themselves as experts. According to the literature, SIEs are often employed in technical fields (Richardson, & Mallon, 2005), and this was also the finding in this study.

Participant 8: "... yes, they allow expats and so forth but not just ... anyone. It must be someone with a something special, that they throw on the table, when you apply for a visa, like, okay, this guy has this and

our guys they don't have this, okay, it makes sense, you know what I mean. They don't, like, hey, we have millions of these guys, our local guys, and now we take him [the SIE].”

Participant 3: “So we are multi-skilled, basically, for them, so, for them it's, uh, you know, get one person to do two jobs. That helps a lot money-wise for the company...”

Participant 3: “So, *multi-skilling expats*, hiper belangrik.”

[*Thus being a multi-skilled expatriate is extremely important.*]

Although three of the participants' main motivation for going abroad was to join up with friends and to travel, two of them had unique skills and/or experience that opened a door for job opportunities in order to finance more travelling. Inkson et al. (1997) acknowledged that an individual will sometimes transfer between jobs, areas or countries simply to take advantage of leisure and vacation opportunities and to visit new places. The obligation to pay one's way can involve accepting relatively unskilled temporary work with little apparent career value. I am of the opinion that this will mostly be applicable to those individuals whose primary reason for SIE is to travel, which was the case with only a minor portion of this sample group. However, travelling did form part of the pull factors or benefits of SIE, and it will be discussed under Theme 6 – Incentives.

From the data it seemed that the participants found SIE addictive. Although they were hesitant to go at first, once they had done so they wanted to continue doing it for as long as possible.

Participant 2: “So, one of my friends actually got the job there and he asked me to join him. Uh, that was a big decision to make. Because you're, we're used to the mines, used to the salary and this is something, uh, unexpected and you're not, uh, used to it; it's something different than what you are doing in the mines.”

Later in the interview when asked whether he would return to South Africa permanently, the same participant said the following:

Participant 2: “Um, hopefully not. I would actually love to stay in contract work until I go on pension. As long as possible.”

In order for SIEs to keep on working abroad as long as possible they have to ensure more opportunities for themselves. Richardson and Zikic (2007) described it as being “on the

look-out for opportunities”. Similarly, through developing professional networks and engaging in activities and projects, SIEs aim to enhance their potential career prospects (Richardson, & McKenna, 2002). As far as this specific sample group was concerned, this enhancement was achieved mostly through networking and delivering high-quality work.

Participant 2: “I’ve met so many people there with opportunities to go and do more work in different countries, which I would have never picked up here in SA.”

Participant 3: “... as jy eers in die bedryf kom dan weet jy waar om te krap vir die kontrakte. Jy weet waar om te gaan kyk en jy weet waar om te soek ...”

[Once you are in the industry (SIE) you know where to search for contracts. You know where to look and where to search.]

Participant 3: “... you are only as good as your last job ... how good you are, and you have to get along with the different companies you work with.”

Participant 7: “I have never left, gone to a country for a job, so I’ve always found one when I got there ...”

The last statement is in contrast to the statements of the other participants. Contrasting statements will be pointed out and not kept hidden in this study in order to enhance the quality and rigour of the study. This statement is quoted here because although the participant concerned never had a pre-arranged job, and his primary goal was to travel, he realised that networking was of the utmost importance to find a job.

Participant 7: “... [you] generally get employed by an expat who you know or you know through someone or you met through someone ...”

In conclusion, being SIEs means that you must either be multi-skilled or have a unique contribution to make; in other words, you must occupy a niche. Aspect that were given prominence during the interviews were the characteristics and work ethic of South Africans, even though the researcher had not made these part of the focus point of the study. Most participants mentioned that there were many opportunities for South Africans in foreign countries due to their work ethic and exposure to a multi-cultural background. Moreover, the majority of the sample group had been recruited based on their previous qualifications and experience, and most of their future opportunities were dependent on the quality of work they produced as well as the networks and relationships they

established during the time they spent abroad. The participants made it clear that it was not only about transferring their knowledge and skills in the host countries but also about gaining more experience themselves and bringing that experience back to South Africa (see participants' statements below). This brings us to the next pull factor, which is international experience.

Participant 1: "And that one thing about, I think about South Africans, we learn a lot, and we, we, we're not scared to do something and we are there to push the job, because you grew up like that. And then the other thing is, we're not there to do only one job ... do everything, the more you can learn the better."

Participant 3: "... those big companies, they are very professional in the way they do stuff. So you learn all of that and you can bring that home. And when you work over here, obviously you can teach the people a little bit more how the things work overseas."

Theme 4 – International experience

Careers today are becoming increasingly fluid, and people no longer depend on ascending hierarchies within companies (Inkson et al., 1997). The work environment is characterised more and more by temporary assignments and by building skills across companies and borders. This seemed to be true for the current sample group whose participants wanted to add to their already existing reputation of being 'multi-skilled' and 'expert'. Those in the sample group who had been recruited to train others in the host countries (e.g. participants 1, 2, 3, 6, and 8) went abroad not only to transfer their knowledge and skills but also to gain more knowledge and skills themselves.

SIEs seem to be of the opinion that international experience is highly valued (Suutari, & Brewster, 2000) and that it will have a positive influence on their future professional lives. While career development is not the primary motivator for all SIEs to go abroad, it still contributes significantly towards their decision to do so (Richardson, & McKenna, 2002). For this specific sample group international experience was indeed a very strong pull factor, seeing that it was mentioned in all the interviews as a benefit of expatriation, regardless of what the main reasons for expatriation were. From the above it might be concluded that the sample group can be considered as boundaryless careerists.

Thomas et al. (2005) defined boundaryless careerists as persons who transfer across borders to build their career competencies and consequently also increase their market value. One of the big pull factors for SASIEs in this study were the challenges associated with the new work environment, new work methods and a higher level of exposure to different cultures within the workplace. This supported the findings in the literature (Fitzgerald, & Howe-Walsh, 2008). Furthermore, the new learning opportunities and the experience obtained were perceived as great benefits. This mirrored previous research that suggested that foreign tasks are seen to be broader and more challenging (Inkson, & Myers, 2003; Richardson, & Mallon, 2005).

Participant 2: “For me, to work in that country is an experience that ... you can't do it in South Africa ... like a big challenge, and the experience that I'm gonna gain there, I won't be able to pick it up in here in South Africa, not ever.”

Participant 6: “Uh, I guess career-wise you get international experience. And, uh, though I always tell people that in South Africa, because we are like a multitude of different cultures, you are exposed to different cultures already, but when you live in a foreign country it's a little bit on a higher skill than back home; you are out of your comfort zone while getting international experience.”

Participant 7: “... overseas experience, I think, probably counts quite highly for employers that are looking for a bit of a diverse kind of background or range of experience.”

According to Richardson and Zikic (2007), three dimensions of risk are involved when going to a host country. Firstly, international experience might not be recognised and thus holds implications for career development and employability. Secondly, there is personal risk, which involves stability and job security. And lastly, there is the risk of spouses not being able to secure jobs in the host country, which can lead to conflict that affects personal relationships and financial stability also.

While none of my questions focussed on the dimension of risk, it was interesting to note that none of the participants mentioned any of the three dimensions of risk associated with going over to the host country. It might be because few of the participants had actually repatriated to South Africa temporarily, and in the instances that they had, their goal was not to stay permanently; they saw it as an interval period before the next opportunity arose to go abroad. The overall experience associated with going abroad (Richardson, &

McKenna, 2002) was found mostly within this sample group, and it seems that it is also the case for other SIEs (Inkson, & Myers, 2003; Suutari, & Brewster, 2000).

The literature suggests that career exploration can be a source of professional and personal reward (Richardson, & Zikic, 2007). It seems, however, that personal interest more often than not ranks as more important than career development as far as SIEs are concerned (Suutari, & Brewster, 2000; Inkson, & Myers, 2003). Some of the participants in this study had gone in search of new experiences both in terms of the workplace and their personal lives, which brings us to the next theme, namely life experience as a pull factor to the host country.

Theme 5 – Life experience

As far as the demographics of the sample group were concerned there was no distinction when it came to life experience: it was a strong pull factor for all the SASIEs. This finding also seems to correlate with previous findings about SIEs (Richardson, & Mallon, 2005; Richardson, & McKenna, 2002) – individuals expatriate to experience some kind of life challenge, of which the three main categories are a desire to see more of the world, a search for new opportunities and a desire for adventure or a challenge.

This notion was supported in a study done by Inkson and Myers (2003) who found that ‘whole-life’ factors are ranked above career development factors as priorities for SIEs. These ‘whole-life’ factors include social connection, non-work-related exploration, pursuit of stimulation and change, changing personal relationships as well as cultural experience. This cultural experience may encompass exploring differences related to religion, professional background, race, gender and ethnicity (Mayer, & Louw, 2011). The researcher is of the opinion that this essential need for ‘life experience’ can be linked to Maslow’s theory of self-actualisation. Therefore, as has been done in the literature, I grouped all the aspects relating to personal growth, self-actualisation and the need to experience something different, under this theme.

It seemed from the data that the personal growth that participants gained from being SIEs could not be gained when living and working in South Africa. This is similar to findings in the literature (Richardson, & McKenna, 2002; Fitzgerald, & Howe-Walsh, 2008). SIE

provides individuals with the opportunity to experience something new and different and something that most of them struggled to describe.

Participant 2: “So, for me it was something [I] cannot actually describe.”

Participant 5: “Well, working in a foreign country definitely broadens your horizons, broadens your mind into different experiences you pick up, not only work-wise but you learn to work with different cultures and religions.”

Participant 7: “... completely eye-opening experience ...”

Participant 9: “I have realised how clouded and wrong our perception about other nations are ...”

Many of the participants enjoyed the treatment they got from being SIEs, and the recognition and appreciation they had not received in South African organisations they finally received in the host organisations.

Participant 8: “But you come here overseas, people are, like, giving you credit, you know, they’re like, wow, okay, you know what I mean. ‘Cause they’re appreciative towards you, you know what I mean. So that’s one of the most, one of the biggest benefits, that appreciation [of] what I do, you know what I mean.”

Participant 2: “Actually, with us as expats, they treat you very nice, they know that you are there to help them, they appreciate it and they support you all the way.”

Participant 9: “They praise hard work and appreciate the input that you bring to your role.”

Participant 5: “Working in Asia has been liberating in the sense that people don’t judge you by your skin colour ... [they] judge you by your character and what you bring to the table, not by where you’re from or what culture you are or religion you are ...”

From the last statement it can be seen that most of the participants enjoyed the fact that they were acknowledged for their individuality and that they were not placed in ‘race or culture boxes’. The SIEs enjoyed receiving recognition for their hard work and also being part of major events. Furthermore, many of them experienced a sense of triumph about being able to reach success in their work environments or assigned projects. Richardson and Zikic (2007) also found that SIEs enjoy being the ones defining their own success and failures rather than having these imposed from above. They furthermore found that SIEs

look forward to the prospect of self-fulfilment, more involvement with the family and environmental exploration, amongst other things. The sample group in the study done by Richardson and McKenna (2002) perceived SIE as the mechanism that enabled them to be more tolerant, patient and confident. Somewhat similar findings were obtained in this study.

Participant 5: “So, that has definitely helped me to open my mind towards people and, you know, experience new types of different cultures and religions, and has made me much more diverse and much more approachable, and I feel that I could handle more people on the same level than I did while I was in SA.”

Additionally, the participants were happy to be able to make a difference in other countries, whether it was physical or spiritual; in the end it contributed to a sense of self-actualisation. And lastly, being SIEs made them more appreciative of family and friends back home and of the beautiful country, South Africa, that was sometimes taken for granted.

Participant 8: “... it makes me more appreciative of my country, 'cause now if I go back home, I'm more like a tourist.”

Participant 9: “I have grown so much as a person and you also appreciate your family, friends and country so much more. And you meet different people from different walks of life and you broaden your horizons, which is always a good thing.”

Theme 6 – Incentives

The last theme under pull factors to the host country is incentives, and these incentives include financial benefits, more leisure time and the opportunity to travel and see new places. A financial benefit is that a SASIE gets paid in a foreign currency (and not in South African rands (ZAR)), since they are hired as locals in the host country (Hu, & Xia, 2010; Suutari, & Brewster, 2000). For the younger, unattached participants in the study, that provided an opportunity to save money, whereas for the more mature participants who had spouses and children, it was seen as an opportunity to better provide for their families. The latter way of thinking is supported by previous findings in the literature (Richardson, & Mallon, 2005; Richardson, & McKenna, 2002). For both young and old the financial

benefits also provided them with the opportunity to see more of the world (this will be discussed later).

Participant 1: "... money makes the world open for you as well because you can do more, you can give your children a better life ..."

Participant 2: "... you get a better package, everywhere you go. As soon as you accept the expat job, the contracts are always better than what you are getting now ..."

Participant 6: "... financial reasons. So I thought if I get out of the country, maybe I'll financially ... financially it will be a better position for me ..."

The literature suggests that fringe benefits, such as a housing allowance, are less likely to be part of an SIE's package (Suutari, & Brewster, 2000). This was also the finding in this study, as the participants who received housing allowances were in the minority. In contrast to the literature, however, none of the participants mentioned seniority bonuses to be part of their benefits.

Apart from the fact that SASIEs receive more money, a better package and benefits, most of the SIEs benefit tax-wise. Some of the participants indicated that they paid a lot less in taxes than ordinary South African citizens did, whereas other participants indicated that they did not pay income tax at all.

Participant 3: "En [salaris] dis belastingvry en dis landwyd [die] tendens, niemand kan aan dit raak nie, dis 'n wet." [*And it [salary] is tax-free and it is a national tendency, no one can touch it, it is the law.*]

Participant 3: "... tax purposes as well. The reason why I am still living here [in South Africa] is because of my tax purposes. I'm out of the country long enough not to pay tax here, so for me it's a great benefit."

In addition to the obvious financial benefits of SIE for SASIEs, the majority of the participants found they had more leisure time on their hands. And because they received more money they had the option to travel more. Some participants also mentioned that money was not the only factor that hindered travelling when you lived in South Africa; the geographical location of South Africa was a major hindrance. The kind of travelling that participants mentioned in the interview did not only include going across the border and

experiencing other countries, but also doing sightseeing in the host country where they were working.

Participant 1: "... and it was hard for me to leave [the host country], because I really enjoyed [it], it's a nice country ... because in private time like Sundays or holidays, there's a lot of things to do ..."

Participant 2: "... in a way for me it is to see more of the world. If I was staying in SA, working for the mines, on the salary that we got at that stage, I wouldn't have ever seen Hong Kong or ... like in Hong Kong, now I have the opportunity to go visit other places near Hong Kong, like Thailand, Bangkok, Vietnam, which is close to us ... where in SA I would have never had the opportunity to do that, so that's one of the, another, reason why I had to accept."

Participant 7: "I think the rest of the world is so far away from SA that it's – unless you've got heaps and heaps of money – it's quite hard to travel to all those places. Uh, and, for me, I just wanted to get out and see the world, uh, but I think for a lot of other people, uh, it's probably for career opportunities."

One of the participants summarised all the themes that fall under the family of pull factors of the host country quite nicely. This was her answer when I asked her what her perceptions were of the benefits of working in a foreign country.

Participant 9: "It is a great opportunity to be able to work in another country; it is a huge learning curve both career-wise and on a personal level. Obviously, financially, it is also an advantage. And for me, being able to have travelled is really amazing, which I would not have been able to do from South Africa as much."

Obviously SASIEs also face a great deal of challenges in the host country, however, in this specific sample group these were not really factors that would make them pack up and come back to South Africa. What would make them leave the host country and return to the home country or move to a different host country with better benefits, was rather a lack of or some form of change in the pulling factors.

Participant 1: "After that a Chinese company bought it over, they gave me a new contract but the salary was worse than SA money, so I decided to go back to SA ..."

Nevertheless, I still decided to discuss the challenges that SIEs faced in the host countries, seeing that these could indicate possible push factors.

3.2.3 Push factors of host country

Though the majority of participants described embarking on SIE as a beneficial experience, there was some widespread agreement that it also meant facing a good deal of challenges (Richardson, & Zikic, 2007). As one of the participants stated: “The grass is not always greener on the other side”. Consequently there are certain challenges a SASIE faces when in the host country. The main issues that came out were cultural challenges, religion, language, missing the family back home and work-related issues. Thus the two main themes under this section is; ‘the lonely foreigner’ and ‘contract and work permit’.

Theme 7 – The lonely foreigner

Being a foreigner in a strange country has challenges of its own, but being a lonely foreigner is a different challenge altogether. The majority of the participants listed differences in culture and language and missing their loved ones at home as the main challenges of being SIEs.

Participant 9: “Main issues for me are difference in culture, religion, values, sense of humour and work ethic ... shock to your system when you realise how different people are and how different from you they have been raised. Values systems that we grew up with are not even in some people’s framework. South Africans are very hard working and have certain standards you expect in the workplace. Unfortunately not everyone thinks and approaches their work the same way ... was hard to get used to that.”

Even though English is the international language in most countries, it is important to understand that not all people do indeed speak and understand English (Robertson et al., 2007). Some of the participants worked with individuals who did not understand English, and in some instances SASIEs had to train these individuals, and thus experienced communication challenges.

Participant 1: “... and there you must learn the language otherwise you cannot communicate.”

Participant 2: “... basic language that we use there is English and luckily there are people there that we can use as translators, if there are people who actually don’t understand English.”

Participant 3: “... hulle [Soedanese] kan nie met my kommunikeer nie, want taal, dit was ’n groot probleem.”
[... they [Sudanese] cannot communicate with me because language, that was a big problem.]

Apart from the language barrier, individuals had a hard time adjusting to the different cultures, work ethic and ways of doing things as well. From the literature it seems that transformation is one of the hardest things for SIEs to do, in other words, “letting go of one world view, and taking on another” (Richardson, & McKenna, 2002, p. 75). Furthermore, some participants experienced a sense of caution and defensiveness from the local community, which caused an additional barrier that had to be overcome. Richardson and Zikic (2007) also observed how ‘cultural toughness’ and ‘cultural distance’ seem to add to the challenges SIEs face, thus leading to the perception of being an outsider. Furthermore, the perception of being an outsider also hinders some SIEs to form close friendships (Richardson, & Zikic, 2007) and to integrate into the local community (Richardson, & McKenna, 2002). Below are some examples of why the participants might have formed the perception that they were outsiders.

Participant 3: “... sometimes, you know it’s hard, they [locals] are not too sure why you [are] there and [why] they [organisations are] not using the local people. So, yeah, there are a lot of challenges involved ...”

Participant 5: “... local community, they sometimes have a bit of an attitude towards you ...”

Participant 7: “... it was quite a culture shock. ... Just in terms of how different the East is to the West. Uh, in terms of their mentality and manners and lack thereof and, uh, the sheer volume of people and just the foods and the smells and the work ethic are quite different to the West ... and I’d feel a bit like, you know, like sticking out like a sore thumb ...”

Participant 9: “Few struggles I did have in the UK was [were] getting along with all the different cultures. You learn a lot more about people and their cultures, and I have friends from various nations today.”

The majority of the sample group had expatriated alone, leaving family, friends and loved ones behind. This was due to a number of reasons; either their children were still in school and relocation would have had an unsettling effect on the children, or complete relocation was just too risky due to the uncertainties connected to contract work, or the participants were young and unattached. The literature suggests that certain SIEs are largely motivated by the desire to do what is best for the whole family as well as by the possibility of improving their own as well as their family’s quality of life and living standards (Richardson, & Mallon, 2005; Richardson, & McKenna, 2002; Selmer, & Luring, 2011(b)). However, missing the loved ones at home and ‘culture shock’ seemed to be two of the biggest challenges that SASIEs faced when going abroad. Culture shock is a diverse and

understudied concept (Robertson et al., 2007), a concept that will be investigated in this study's literature review.

Participant 2: "But at this stage it is contract work, so if you must give up everything that you've got in SA, you must sell your house, your furniture, give up everything and go work on a contract and anything can happen on a contract; you can lose your job, your contract ends and there is no other contract available, and you have to come back and you have to start again from scratch. Which me and my wife [my wife and I] decided is not worthwhile doing."

Participant 3: "It's hard, you're away from home, your family ... you miss birthdays, holidays and all that stuff over here. So, it's, it's, it's a hard life."

Participant 5: "So, it's hard working abroad because it's lonely."

Participant 9: "I went over alone. I wish they came over with me, it is hard to be as far away from them."

Another challenge the SASIEs faced was getting work permits and, in some cases, securing future opportunities or contracts. That was hard because most of them wanted to be SIEs for as long as possible. This aspect will be discussed in more detail next.

Theme 8 – Contract and work permit

While studying this theme I came to the realisation that all the participants could be contract workers, which would be a characteristic unique to them as a group. This phenomenon had emerged spontaneously from the data. I decided to confirm this interesting phenomenon by telephoning the participants, and subsequently found that this was indeed true for the majority of the participants. Two of the participants were permanent employees but their work permit and/or visa still needed to be renewed every few years. All the other participants were contract workers whose contract periods varied from six months to three years. A study done by Suutari and Brewster (2000) indicated that SIEs are more likely to work for a project type organisation. Similarly, upon examining the length of foreign assignments it was discovered that there is a clear tendency among SIEs to work on temporary contracts (Inkson, & Myers, 2003; Richardson, & Mallon, 2005), and this was demonstrated in the case of the majority of the sample group in this study.

While the majority of the participants did have a secure job when they expatriated, some did not (and they experienced some difficulty in finding jobs). A further challenge was getting a work permit or a work visa. Some of the participants went over on a short-term contract and had to proactively start looking for new opportunities and managing their careers before the contract came to an end and before their work visas expired. Some label the situation where employment is related to work permits and contracts as working under a 'time sentence' (Richardson, & Zikic, 2007).

Consequently, networking, as discussed earlier, and timing are two very important factors for the hands-on management of careers. Richardson and Zikic (2007) expressed the opinion that, in addition to networking to build up personal connections, a person's individual and family lives (Richardson, & McKenna, 2002) also play a significant role in career mobility. Nevertheless, it seems that SIEs are far more likely to accept a further foreign assignment (Suutari, & Brewster, 2000) than return to the home country. Limited contracts and work permits in the host country do not feature as reasons to return to the home country but rather seem to serve as inspiration to explore more opportunities. Richardson and Zikic (2007) also supported this notion. Below are a few examples of what participants had to say about securing a job and a visa.

Participant 7: "... if you are coming here and you are willing to network and meet new people and get out and get yourself out there then it's probably easy [to get a job], but if you're just coming and expecting to land in a job or if you are coming without a pre-organised job, then I, I found it quite hard."

Participant 5: "... and the problem was in Hong Kong, at that stage also, they [were] also going through an economic recession ... so it wasn't easy to find work ..."

Participant 9: "If it was not for my qualifications (master's degree in Law) I will not be in the UK anymore. Visa requirements changed and I was only able to apply for my visa because of my qualifications."

Participant 6: "... [I will work] anywhere in the world. I'm open as long as I can get a visa."

Most of the participants got assistance from their organisations to obtain visas. This kind of organisational support will be discussed more extensively in the next section. From the data it became evident that even though SASIEs faced some challenges in the host country, other factors helped them to cope or to make adjustment easier. These factors will be discussed next.

3.2.4 Coping with push factors / Adjusting

It is true that SIEs face challenges when going abroad. In addition to the challenges mentioned previously, the literature found that SIEs also face unemployment, lack of cash, poor working relationships and depression, which can cause them to become 'homesick' (Inkson et al., 1997). Despite these challenges, SIEs do not make negative comments about SIE, even when invited to do so (Suutari, & Brewster, 2000). This could be due to the fact that SIEs choose to expatriate and they choose their host country, which enable them to be more tolerant.

Participant 7: "... then again, I wanted that change as well, so it was, I kinda made it work ..."

Ainuddin and Lily (2012) found that SIEs tend to find adjustment slightly more difficult than AEs do. Two themes that emerged in respect of coping with push factors or adjusting in the host country were organisational support and familiarities.

Theme 9 – Organisational support

The literature suggests that AEs receive organisational support (Ainuddin, & Lily, 2012; Suutari, & Brewster, 2000) whereas SIEs mostly do not (Bozionelos, 2009). This is one of the distinguishing characteristics between AEs and SIEs. Typically, SIEs have to take personal charge of their career paths without the direct support of their organisations (Selmer, & Luring, 2011(b)). This sample group, however, proved to be the exception to the general rule. Although the participants had to stand on their own two feet and find their own way around, most of them had received *some* kind of support. Although not all of them had received the same type of organisational support, I decided to include it as a theme, seeing that the type of support they had received, even though it might not have been comprehensive support, had contributed to their adjustment. The type of organisational support varied from booking of and paying for flight tickets to assistance with medical aid, accommodation and visas. Some participants, although in the minority, also had assistance from agencies that provided orientation sessions, arranged interviews and assisted with opening bank accounts.

It should be noted that participants seemed to have adjusted faster and easier in the workplace than they had to the rest of the country and the locals. (This will be discussed in more detail under the next theme.) For a more complete picture of the different types of organisational support that helped participants to adjust, see some of their remarks below.

Participant 1: "... [my] family visit me quite often, because the company supports us and the money we make is all right. Yes, one thing ... all the companies I worked [for] before were very good, because they give you housing; if they don't give you housing they give you housing allowance ... they pick you up at the airport, they pay your flight ticket ..."

Participant 2: "... in both countries the company actually organises your medical aid for you and, uh, the plane tickets up and down ... housing allowance ..."

Participant 3: "... groot wortel is, 'yes', hulle kyk mooi na ons, hulle betaal al ons vliegtuigkaartjies, hulle gee vir ons helse goeie verblyf ..."

[... a big pull factor is, yes, they look after us well, they pay our flight tickets, and they give us very good accommodation ...]

Participant 9: "My company I am working for is very supportive; they assisted me financially with my tier 1 visa extension."

Some of the other factors that helped the SASIEs cope or adjust faster to the new host country will be discussed next. As most of these factors fall outside the organisational context (except for one which has to do with a job or task at hand) I grouped them under the theme that I labelled familiarities.

Theme 10 – Familiarities

While the majority of the participants expatriated alone, leaving loved ones and friends behind, most of them were accompanied by acquaintances or other expatriates, or they knew acquaintances or other expatriates in the host country. In contrast to the finding by Richardson and Zikic (2007) that forming friendships is a wearying experience, having friends or acquaintances around helped this sample group to adapt more easily to the new situation. On the other hand, Richardson and McKenna (2002) found that intimate friendships between expatriates form quickly, which might be attributed to their feeling like outsiders and having the need to stick together. It should be noted that an unwillingness to even try and form new friendships in the foreign country has also been found, and this might be a type of coping mechanism (Richardson, & Zikic, 2007). Such unwillingness was not found among the South African SIEs.

Participant 5: “And luckily, with the rugby I’ve made new friends that have helped me to adjust, but I can see that people who don’t have the luxury that I have with my friends here, struggle with adjusting to the cultures, and, you know, the way of living in this country.”

Participant 7: “... but I find it really easy to meet people here, because it’s such an expat community here.”

As mentioned previously, participants seemed to have adjusted more easily to their work environment than to the rest of the host country. Some of the reasons for this were that they were familiar with the work they were doing, and/or they had sufficient qualifications and experience and/or they went prepared. Furthermore, participants stated that working with other expats made them feel less like outsiders and helped them to adapt.

Participant 6: “Oh, at work it actually took me less than a month to adapt, because it was what I was doing already back at home so and, uh, so at work I adapted very quickly.”

Participant 5: “... it wasn’t hard adjusting [in the workplace] cause Australian working culture is much the same as back in SA ... construction is hard, you know, it’s long hours, you know, people don’t care, you know, work is tough. So it’s gruelling work so, uh, so I was prepared for it. So it wasn’t hard for me to adjust to that because I was prepared for it.”

Richardson and Zikic (2007) pointed out that the transience and risk of an international career encourage a need to be prepared. The assumption might be made that South

African SIEs, being used to working with different cultures, find it easier to adapt to other cultures. However, it seems that ease of adjustment is dependent more on individual characteristics than on background and experience.

Participant 8: “If I was coming from a place whereby it’s only one race of people it would have been different to work with other races and so forth but because I’m coming from a multi-racial country, so it made it easier, you know what I mean.”

In contrast, another participant remarked as follows:

Participant 6: “... I always tell people that in South Africa, because we are like a multitude of different cultures, you are exposed to different cultures already, but when you live in a foreign country it’s a little bit on a higher skill than back home.”

The availability and accessibility of amenities and entertainment in the host countries also helped some of the participants to adapt. In contrast, the SIEs that had expatriated to African countries had a harder time adapting due to the poor living and working conditions as well as the extremities of the external environment.

One of the participants made an interesting comment (see below) which made me think that there could be an inherent psychological quality that drove some participants to cope and to adjust in order to make a success of being an SIE. However, since this aspect was mentioned by one participant only, I did not include it in the themes. Nevertheless, I felt that it was worth mentioning because it could call for further research on the attitudes SIEs have to adopt to survive.

Participant 8: “Well, the challenges, they’re big you know, they’re big. ‘Cause, uh, what I think is, because of, number one, when you’re home, you’re home, you know. If something did not work out, you don’t give a damn, it didn’t work out, you know. Your family is still here, you’re still okay, you know. But when you’re overseas, you gotta make it work, regardless. There is no excuse [of] I can’t make it, oh no, there’s no opportunity, oh no, I’ve missed an opportunity, oh no, I’m waiting for this guy who says he’s gonna do this for me, no. You either wake up, you make it, or you don’t. So, I wouldn’t say it’s a disadvantage in that sense, I’d say it’s a, it’s a button, you know. It’s a button to make sure you keep your game on all the time, you keep focus all the time. It’s like you don’t succeed back home, you go back home, then you realise, no, I had it all, I had it in my hands and I didn’t make use of it, you know what I mean ...”

In conclusion it can be said that SASIEs clearly face many challenges when expatriating to host countries. Despite that, this specific sample group had found the means to cope and make it work for them. Whether it was owing to organisational support, support from friends and family or internal motivation, the participants did not experience any of the challenges as big enough to result in the final push factor that made them pack up and go back home to South Africa. Lastly, attention will be given to the pull factors of the home country, and this exploration resulted in an interesting finding.

3.2.5 Pull factors of home country

Looking at the data I came to the realisation that there were almost no factors that pulled SASIEs back to South Africa. To me, as the researcher, this was quite surprising. The finding of Suutari and Brewster (2000) that some SIEs have no plans to return to their home countries might explain some of the reasons for this. The only possible pull factors of the home country are grouped under the next theme, labelled conditional repatriation.

Theme 11 – Conditional repatriation

The findings might be attributed to the fact that fewer of the sample group repatriated to South Africa temporarily to await the next opportunity to expatriate. This could be because most of the participants were on their first SIE expedition. Participants who did return to South Africa temporarily did so because their contracts had expired, therefore they had no choice but to return to the home country.

A study done by Inkson and Myers (2003) found that just as participants do not necessarily travel for career reasons, they do not return for career reasons, but rather for family reasons. This seemed to be the case in this specific study as well. In the event that the male participants would consider returning to South Africa permanently, there were some terms and conditions which were mostly related to the initial push factors mentioned at the beginning of the chapter. However, it seemed more likely for them to return at retirement, but not for career purposes. The female SIEs indicated that they were more inclined to return to South Africa after they had done exploring, however, they still needed some form of security before doing so.

According to the literature the responsibility rests with SIEs to create their own jobs after repatriating to the home country. This is in contrast to AEs who might have a secure job on their return to the home country. As a result, SIEs' situation might be less certain (Suutari, & Brewster, 2000). Below are some of the participants' responses when asked whether they would return to South Africa permanently.

Participant 1: "Well, I would return to SA permanently, depends on ... if they would take me back for work, because sometimes if you're old they won't take you or they will tell you you're overqualified, but if I can ... come back to SA and get a good job, I'll come back, if the money is acceptable to me. I mean, I don't expect they must pay me what the expat job [did], but if they just pay me for my experience and what I can teach people now, I will come back, because I really like SA."

Participant 2: "I would actually love to stay in contract work until I go on pension. As long as possible. If I come back to SA, I don't want to go back to the mines anyhow ... but I will try and work for as long as possible in my current career, in contract work overseas."

Participant 4: "... if I have a lot of money and I can retire ... because it is still a nice country, you know, it's beautiful, there's still a lot of stuff we can do, you can just jump in your car and in 20 minutes you can sit in a game park, you know, stuff like that. So, no, I will definitely come back and retire down here."

Participant 5: "If SA keeps on legalising racism in the workplace, I won't go back. Make it a fair and equal workplace for everyone. 'Cause that's the only way a country develops ... Don't get me wrong, I have nothing against other ethnicities. I just feel that the best person for the job must be chosen."

Participant 6: "Oh yes. Eventually when all this exploring is over, I will go back."

Participant 7: "I don't have any specific reason why I'm not going back but I just have no big desire to rush back there. Maybe I have this dream that one day I will live there again 'cause I, you know, putting crime and stuff behind, you know it wouldn't really bother me 'cause it just feels like home, uh, but I don't know when that will be. I wouldn't say it would be in the next one year, two years, three years."

Participant 8: "But now, for me to go back, I think it would be selfish to go back. Why I say to be selfish? Okay, I'm, I'm one of the only South Africans who came this far with no one's help, you know, with nobody helping me ... I had to do everything myself, you know, I had to knock on doors myself, you know ... So, now if I wanna open up doors for others, like for others who wanna follow my footsteps ... I can be that kind of a bridge."

Participant 9: “I have never come over to the UK to settle here permanently. I came for the work, travel and life experience. South Africa will always be my country and my plan is to go back in three years ... [but] will not go back if I don’t have a job finalised.”

3.3 COMMENTS ON MY STUDIES

The opportunity was given to the respondents to make any comments about my study, and this is what one of the participants said:

“Usually these studies are on Americans or European expats; it’s great that now we’ll [South Africans will] have one as well, especially with all the misconceptions people have about Asia [working in Asia]. Hopefully it is going to help more people to take a leap and explore the world.”

Another participant remarked as follows:

“A lot of people have asked me if I have to choose again will I make this decision to work and live in the UK, and my answer is yes. I have grown so much as a person and you also appreciate your family, friends and country so much more. And you meet different people from different walks of life and you broaden your horizons, which is always a good thing.”

One of the participants gave the following fitting summary about SASIEs and SIEs:

“Yes. South Africans are very, very, uh, popular around the world. Especially expat South Africans, ‘cause ... we are products of our environment, we are used to discrimination, we are used to, uh, working in hostile work environments and difficult situations, working with different cultures and, you know, ethnicities. We are ambitious, we are decision makers, we are firm, we are highly motivated and for South Africans it is easy to get a job around the world, easier to get a job around the world. So, there are a lot of opportunities around the world being an expat.”

3.4 CONCLUSION

The aim of this chapter was to answer the main research question, namely: What is the push and pull factors experienced by South African self-initiated expatriates? In this chapter I used extracts and quotations from the interviews with the SIEs. By doing so I was

able to present the participants' personal experiences and perceptions as they intended to convey them.

This chapter made it clear that the South African SIEs in this study experienced certain push factors from the home country (South Africa); however, there were pull factors to the host country, which were equally strong or even stronger, that had contributed to their decision to expatriate. Interestingly there were no real push factors from the host country, but rather challenges that needed to be endured. Furthermore, judging from this sample group, South Africa did not offer strong pull factors, and repatriation to South Africa as a home country was based on sentimental ideals.

The classification of data presented in Chapter 3 has provided me with a guideline to explore the relevant literature, and my literature review will follow in Chapter 4. The concluding chapter, Chapter 5, will summarise the findings discussed in this chapter together with the findings from the literature in Chapter 4.

CHAPTER 4: LITERATURE REVIEW

4.1 INTRODUCTION

This literature review aims to provide a broad understanding of the concept of self-initiated expatriation (SIE), as well as of self-initiated expatriates (SIEs), through a thorough investigation of the available literature. Firstly the concept of SIE will be explored. This will include the development of SIE as well as the differences between assigned expatriation (AE) and SIE. Furthermore, the aim is to gain insight into the process of SIE as well as the typical characteristics of individual SIEs. Thereafter the literature review will be structured to reflect the research questions of the study and an investigation of the results of themes discussed in the previous chapter. The conclusions based on the results and the literature are discussed in Chapter 5.

4.2 GLOBAL MOBILITY AND EXPATRIATION

Globalisation, which is not a new occurrence (Thorn, 2009), has led not only to organisations increasingly moving their operations across national borders (Ainuddin, & Lily, 2012; Mayer, & Louw, 2011), but also to labour becoming increasingly mobile internationally (Richardson, & McKenna, 2002). This might be one of the reasons for the emergence of SIE, as individuals are increasingly seeking career and lifestyle opportunities outside their home countries (Thorn, 2009). Inkson et al. (1997) are of the opinion that SIE is becoming a definite option worldwide as a consequence of globalisation and changes in careers.

Thomas et al. (2005) even suggested that given the current situation as far as globalisation is concerned, all careers will have to consider including an international dimension. Through globalisation a pathway has been created for the 'boundaryless career' theory (Erasmus, & Schenk, 2008; Thomas et al., 2005), which will be discussed in more detail later. Without a doubt it holds some implications for careers in the 21st century, one of which is that an international career will have to be seen as a long-term individual action, instead of a one-off assignment initiated by an organisation (Thomas et al., 2005).

This is similar to the findings of Chen (2012), which will be discussed in more detail in section 4.4.

The literature suggests that expatriation can be described as undertaking employment in a different country than one's home country (Bozionelos, 2009), either temporarily or permanently (Boselie, 2010). It seems that expatriation has evolved from being a form of 'nation-building' (Green, 2009) to being the foundation of the field of International Human Resource Management as we know it today (Thomas et al., 2005). However, pure expatriation is not the focus of this study. For the purposes of this study it should be noted that a distinction can be made between an individual who expatriates with the support of an organisation and an individual who expatriates on his or her own initiative. The next section will distinguish between AE and SIE in order to clarify the two constructs and to better inform the research on SIE in this study.

4.3 DISTINGUISHING BETWEEN AE AND SIE

The concept AE refers to an organisation's assignment of an employee to go and work in another country (Bozionelos, 2009; Green, 2009). This initiative primarily comes from organisations that operate internationally (Inkson et al., 1997). Inkson et al. explained that a person is assigned to a host country once a position becomes available in the organisation that is situated abroad. Normally this position requires that the person has appropriate knowledge and understands the organisation's strategy, procedures and so forth. Hence a suitable candidate is assigned to the host country on a temporary basis and will return to the home organisation later, presumably in another position. This group of expatriates, namely AEs, have been thoroughly researched when compared to SIEs (Selmer, & Luring, 2011(b)), as a result of which much less is known about the latter group of expatriates.

An increasing number of individuals are taking the opportunity to control their own careers by investigating international career opportunities rather than waiting for an AE opportunity (Maharaj, 2011). This is referred to as a self-initiated foreign experience (SFE) (Suutari, & Brewster, 2000) or an overseas experience (OE) (Inkson et al., 1997). Either way, these individuals are "independent internationally mobile professionals" (McKenna, &

Richardson, 2007, p. 307) or SIEs, as they are referred to in this study, and they appear to be employees who leave their home country voluntarily. In other words, this is a group of non-corporate-sponsored expatriates (Bozionelos, 2009) who are typically hired under a local host country contract (Ainuddin, & Lily, 2012; Green, 2009). What distinguishes this group of expatriates from the AE group is that the individuals personally take charge of their career paths without the direct support of an organisation (Selmer, & Luring, 2011(b)).

SIEs can be seen as long-term travellers in pursuit of career development as well as personal and cultural experiences (Myers, & Pringle, 2005). However, SIEs are neither immigrants nor sojourners (Richardson, & Zikic, 2007). Even though SIE is more common among academic expatriates (Hu, & Xia, 2010), the body of knowledge in confirmation of this is still limited (Maharaj, 2011; Richardson, & Zikic, 2007; Selmer, & Luring, 2010), but it seems that it is a relatively new phenomenon among business employees.

A lack of research on SIEs and the SIE process is noticeable. A full understanding of what it means to engage in SIE has still not been reached, and there is a need for further clarification of the concept and the way it relates to similar constructs, as well as of the way it can be operationalised and theorised (Dohery et al., 2013; Selmer, & Luring, 2011(b)).

Although the research on SIE and SIEs is limited, it is clear from the existing literature that there are a few characteristics that differentiate SIE from AE (see Table 4.1). It is important to note that SIEs have been acknowledged as a distinct (Bozionelos, 2009) and heterogeneous (Suutari, & Brewster, 2000) population. Hence, findings on AE cannot necessarily be generalised to SIE.

Table 4.1: Differentiating characteristics between SIE and AE

| Differentiating characteristic | SIE | AE |
|---|-----------------------|----------------------|
| 1. Source of initiative (Clearest defining difference) | Individual (employee) | Employer |
| 2. Goals relating to | Extensive and often | Mainly completion of |

| | | |
|------------------------------------|--|--|
| foreign job | unspecified individual development | specific organisational projects; could be combined with personal motives |
| 3. Source of funding | Own funding of transfer | Funded by organisation |
| 4. Career types | Boundaryless | Organisational |
| 5. Individual background variables | Heterogeneous group (mixture of experienced people and those in early career phases) | Educated and skilled individuals Key position in transferring knowledge |
| 6. Existing literature | Shortage | Abundant |

Source: Inkson et al. (1997); Suutari, & Brewster (2000)

A final point to be mentioned for the purpose of this study is that AE involves the assignment of an employee by an organisation to a position in a foreign country. In contrast, SIE is the pursuit of an individual to seek employment in a foreign country on own initiative, or SIE is pursued by an individual who has been presented with the opportunity to work abroad and who volunteers to do so (Ainuddin, & Lily, 2012; Jokinen et al., 2008; Schoepp, & Forstenlenchnes, 2011) either on a temporary or a permanent basis.

4.4 CONCEPTUALISATION OF SIE

4.4.1 The process of SIE

Throughout the study a conceptual framework, which included the story of SASIE, was used in an attempt to answer the research question. While investigating the literature I stumbled upon a three-stage process model of SIEs' career transition (Chen, 2012). This process can be linked to this study's conceptual framework as it is also a suitable summary of the story of SASIE (see Figure 4.1).

Figure 4.1: Three-stage process model of SIEs' career transition



Source: Adapted from Chen (2012)

The steps illustrated in Figure 4.1 are explained below.

Stage 1: Exploration

Exploration or 'career navigation' is concerned with an assessment of internal qualities as well as external opportunities and restrictions. In other words, this step is concerned with the period of time during which SIEs explore international work opportunities, estimate options and costs involved with going abroad, determine their own readiness and resources in order to complete the transition, and finally make and implement their decision (Chen, 2012, p. 21).

Stage 2: Establishment

This is the stage during which the SIEs arrive in the host country, and it involves the initial cultural shock, the adjustment to the host country culture, the finding of employment and the establishment of relationships with others (Chen, 2012, p. 22). According to Chen, SIEs' goal during this stage is to establish their global work experience.

Stage 3: Embeddedness

During this stage the SIEs become more involved in their jobs in the host country and start to put down roots there. According to Chen (2012, p. 22), SIEs might be faced with a few choices at this stage; do they want to continue to live and work in the current host country, or repatriate to their home country, or expatriate to yet another host country? Chen expressed the opinion that SIEs will want to prolong their global work experience, seeing that retirement is not a main concern during the career transition process of SIEs.

The aim of the description of the SIE process was to clarify its relationship to the story of SASIE and to make it applicable to this study as well, therefore the SIE process will be

integrated into this literature review. However, it should be noted that the process of SIE is rather complex. This is due to confusing forces, such as the personal relationships and travel agendas of SIEs, that are not related to career development (Inkson, & Myers, 2003). From the above it is clear that more research is needed on the SIE process. The next section will look at what is known about SIEs as individuals.

4.4.2 SIEs as individuals

Previous studies have been done on the characteristics of SIEs (Inkson et al., 1997) as well as their demographics (Selmer, & Luring, 2011(a); Selmer, & Luring, 2011(b)). However, SIEs should be seen as a heterogeneous group (Inkson, & Myers, 2003) comprising different subgroups (Suutari, & Brewster, 2000), each with distinctive characteristics.

Even though one should not generalise, Inkson et al. (1997) identified some significant characteristics according to which SIEs are typically mobile in terms of geographical location, they are self-supporting and they have weak organisational attachments. They are furthermore driven by curiosity and have personal learning agendas, and lastly they value cultural experience as being important to employment. It seems that their career is mostly a secondary instead of a primary reason to expatriate (Inkson, & Myers, 2003). However, not much more is known about the reasons for SIE.

Two international studies were conducted that focused on the types of SIEs and their reasons and motivations for SIE. The previous sentence is a bit unclear. Consider the following reformulation: The first study, done by Richardson and McKenna (2002, pp. 71-72), focussed on those aspects that motivated academic expatriates to work abroad, and they identified four broad categories, namely to go as an explorer, as a refugee, as a mercenary or as an architect. The study set out to understand the motivations and to describe the experiences of academic SIEs. The explorer was more concerned with seeing more of the world than with developing a career. The refugee had reasons to escape from the home country and was in search of a better life, both personally and professionally. The mercenary's primary motivation was money, and for the architect it was all about building a career.

In the second international study, Inkson and Myers (2003, pp. 176-177) identified six types of SIEs. Their study focussed on the main forms of SIE and the effects on the personal and career development of SIEs. Of these types, three focussed on career development as the main motivation to expatriate, whereas the other three were more concerned with non-career-related agendas. The types concerned with career development were called *cosmopolitans*, *returners* and *boundaryless careerists*. *Cosmopolitans* used their qualifications to secure work, but travelling was still their main motivation for going abroad. The *returners* seemed to have undertaken more than one SIE journey: either a journey had been of short duration or the returners had to return home before they were ready to do so. Hence the second trip was more focussed in terms of career (similar to the *cosmopolitans*). To the *boundaryless careerists* career was the main focus. These people were representative of different occupations and were concerned with developing broader skills sets. However, they still valued travelling.

Inkson and Myers (2003, p. 177) also identified SIEs who were not concerned about career development, and they called them *alternative tourists*, *stimulation seekers* and *Londoners*. *Alternative tourists* mainly wanted to meet new people and see the world. If they were unable to secure employment while in the host country they would become 'returners'. Similarly, *stimulation seekers* wanted to meet new people in new places and to experience different countries, people and jobs. Lastly, *Londoners* used London as a central point for employment and travelling.

Furthermore, a qualitative study conducted by Richardson and Mallon (2005) on 30 British academic expatriates was one of the first to report on the reasons to expatriate. They found five broad categories of reasons for academics to initiate their own expatriation. These categories included adventure/travel, life change, family reasons, career development and financial reasons. More detail on these categories will be provided in section 4.5.

These findings of Richardson and Mallon (2005) served as a foundation for further research. A recent quantitative study conducted by Selmer and Luring (2011(b)) focussed on acquired demographics of SIEs as well as their reasons to relocate. Selmer and Luring found that acquired demographics could have an influence on SIEs' reasons to expatriate to host countries. These demographics included marital status, nationality,

previous expatriate experience and seniority. They also investigated the five reasons for expatriation identified by Richardson and Mallon (2005). Similarly, the results indicated that acquired demographics could make a difference to why people expatriated. Suutari and Brewster (2000) supported the opinion that the different characteristics of SIEs could determine their reasons for going abroad. However, it should be noted that the above studies were conducted on academic SIEs, and it is still unclear whether the findings can be generalised to SIEs in other sectors of employment.

To conclude, the first section of this literature review focussed on the development stages of SIE, and it also referred to the differences between SIEs and AEs. Some insight was gained into the process of SIE, as well as SIEs as individuals. It can be concluded that SIEs are a heterogeneous group of individuals and that certain characteristics and demographics, whether inherent or acquired, might have an influence on their reasons to expatriate. The rest of the literature review will be structured according to the themes that emerged in the data analysis.

4.5 PUSH AND PULL FACTORS OF SIE

This study is the first of its kind conducted in a South African context. As a result no literature could be obtained on typical push and pull factors as experienced by SASIEs. There is a gap in the literature with regard to SIEs working and operating in the South African business context (Maharaj, 2011). Hence it was decided to explore the available international literature more thoroughly.

4.5.1 Push factors of home country (South Africa)

In this part of the literature review, the two push factors that emerged from the data, namely career opportunities (or rather a lack thereof) and legislation in South African organisations will be discussed. This part of the literature review can be linked with Stage 1 of the three-stage process model of SIEs' career transition, namely exploration.

4.5.1.1 Career opportunities in South Africa

Losing skilled individuals to host countries has had an increasingly negative effect on South Africa because it has contributed to the existing skills shortages problem (Grobler, Wárnich, Carrell, Elbert, & Hatfield, 2006; Kerr-Phillips, & Thomas, 2009). The process of skilled individuals leaving South Africa has been referred to as the 'brain drain' (Barker, 2003; Kerr-Phillips, & Thomas, 2009; Nienaber, 2007). As a result of the brain drain there has been a decline in professional careers on the one hand, and an increase in basic occupations on the other hand. Furthermore, skilled workers are being retrenched and executives are taking early retirement (Kerr-Phillips, & Thomas, 2009; Nienaber, 2007). Individuals whose main motivation behind SIE is the lack of job opportunities have been found to be either at the beginning of their careers or in a more advanced/experienced phase of their careers (Suutari, & Brewster, 2000). Retaining these individuals can be beneficial to South Africa. Therefore, organisations need to turn their attention to the reasons why South Africans leave the country, especially those who can be regarded as talented and/or skilled workers.

The literature indicated that certain macro factors, such as social, political and economic issues (Kerr-Phillips, & Thomas, 2009; Thorn, 2009), have a direct influence on the reasons for South Africans to expatriate. These issues more specifically include high crime rates, violence, fear for personal safety and a lack of employment opportunities (Kerr-Phillips, & Thomas, 2009). Some of these have also been mentioned in the literature as motivations for expatriation (Thorn, 2009). Suutari and Brewster (2000) have expressed the opinion that jobs in host countries are more attractive when there is a lack of job opportunities in the home country. Furthermore, seeking alternative careers in host countries will increase concurrently with an increase in unemployment levels and tax rates in home countries (Suutari, & Brewster, 2000). This is especially true among highly skilled and trained individuals (Kerr-Phillips, & Thomas, 2009).

Most of the participants in the sample group in this study felt that, in addition to the limited career opportunities they experienced in the home country, they were underpaid, unappreciated and under-recognised even though they were multi-skilled. They also indicated that they had stagnated in their careers and had hit a glass ceiling in terms of their learning and experience in the South African work environment. It is a well-accepted

notion that SIE presents individuals with an opportunity to learn; learning that is transferable not only in the work environment but also in non-work-related situations (Inkson, & Myers, 2003). Furthermore, SIE presents individuals with an opportunity for change and challenge, as well as an opportunity to escape from negative working situations and the perceived dullness of the home country (Richardson, & Mallon, 2005; Richardson, & McKenna, 2002).

To conclude: SIEs are taking control of their own careers and are moving across national borders in search of job opportunities, and the lack of employment opportunities in South Africa presents worrying prospects for the future, especially in terms of creating an extensive skilled workforce, a stable economy and investor confidence. An additional element that was not mentioned in the previous section but which might have an influence on the lack of employment opportunities (at least for certain race groups in South Africa) is legislation. This aspect will be discussed next.

4.5.1.2 South African legislation and company policies

Through an investigation of the literature it became apparent that South Africa faces some challenging issues (Kerr-Phillips, & Thomas, 2009; Mayer, & Louw, 2011; Nienaber, 2007) due to key political, social and economic factors (Mayer, & Louw, 2011), which in turn will have an impact on organisations (Carpenter, & Sanders, 2009), employees and investor confidence (Mayer, & Louw, 2011). In addition to the issues mentioned above, issues related to legislation, such as affirmative action and broad-based black economic empowerment (BBBEE), have been raised in the literature (Mayer, & Louw, 2011; Nienaber, 2007; Van der Merwe, & Barry, 2010). These legislation issues were also mentioned by the participants in this study.

After the 1994 democratic election there were major changes in the work environment as well as in employment laws (Nel et al., 2008), as a consequence of which organisations had to adhere to a number of laws and also had to manage the socio-historical legacies of apartheid and issues related to diversity (Mayer, & Louw, 2011). The Equity Employment Act, 1998 (Act 55 of 1998), is one of the laws that organisations must comply with (Finnemore, 2009; Nienaber, 2007), and its aims are to ensure the fair treatment of all and to achieve equity in employment. These aims can be achieved mainly through promoting

equal opportunities and implementing affirmative action measures (Nienaber, 2007). These measures are aimed at rectifying the disadvantages that people of designated groups experienced in the past. Designated groups include Africans, Indians, Coloured people, people with disabilities and women. The aim of affirmative action is to achieve, in all occupational categories and levels, a workforce that is a broad representation of the population (Finnemore, 2009).

In South Africa (as in America), people from designated groups who have the appropriate qualifications should be appointed and employers are obligated to implement affirmative action measures and achieve the numerical goals set out (Finnemore, 2009); however, appointing quotas are not enforced on South African organisations. The workplace must be diverse, but a balance is supposed to be maintained between the organisation's needs, the inherent job requirements and suitably qualified employees (Nienaber, 2007). The SASIEs who participated in this study perceived the aforementioned as a challenge for SA organisations.

If it is argued that legislation is supposed to protect workers and advance their knowledge and skills (Barker, 2003; Finnemore, 2009; Nel et al., 2008; Nienaber, 2007), the effectiveness of the legislation referred to above could perhaps be questioned (Nienaber, 2007). The South African work environment seems to be plagued by strikes and uprisings by dissatisfied workers (some resulting in tragedy, such as the one at the Marikana Mine in 2012), corruption, mismanagement, poor education outcomes, unsuccessful equity appointments and many other issues. However, the purpose of this study is not to determine the effectiveness or implications of legislation, but it is an important issue to mention here in view of the fact that it influences SASIEs' decisions to expatriate to foreign countries.

In a study done on civil engineers it was found that BBBEE policies instituted by the government could be blamed for recruitment difficulties in that field (Kerr-Phillips, & Thomas, 2009) as 80% of the white males cited affirmative action as their reason to emigrate. Legislation is perceived to contribute to the shortage of skilled workers in South Africa (Nienaber, 2007): not only does South Africa lose skilled workers who could have made a difference in the economy (Scurry et al., 2013), but the country also has to cope with an increasingly high percentage of unskilled workers. Considering the reported effects

of these laws the question arises whether it is not time to revise and manage these laws, and to focus on appointing people who have the required skills. However, judging from the literature, legislation cannot take all the blame for the dissatisfaction among people; management structures in South Africa are also not fulfilling the economic, social and political needs of the country's population. Therefore, there is also a need for more competent managers in South Africa (Nienaber, 2007).

4.5.2 Pull factors of host country

This part of the literature review, as well as the next part which is concerned with the challenges faced in the host country, can be linked to Stage 2 of the three-stage process model of SIEs' career transition identified by Chen (2012), namely, establishment. Additionally, it can be linked to the findings of Richardson and Mallon (2005) as mentioned in section 4.4.2.

The flexibility to pursue and control one's own career path, in combination with the opportunity to explore different countries and cultures, presents SIEs with an inviting possibility (Donnay, 2012; Maharaj, 2011). As mentioned previously, however, the reasons for SIEs to expatriate might differ based on personal characteristics. Furthermore, it has been reported that different individuals from different nations consider different push and pull factors when deciding to leave their home countries (Selmer, & Luring, 2011(b); You, O'leary, Morrison, & Hong, 2000). From the data analysis the following themes have been derived: being SIEs, international experience, life experience and incentives. These themes will be substantiated further by referring to the available literature.

4.5.2.1 Being SIEs

Even though SIE or self-directed travel (Richardson, & Mallon, 2005; Suutari, & Brewster, 2000) is a phenomenon commonly found among young people, older professional and qualified individuals are likewise choosing to seek employment abroad (Suutari, & Brewster, 2000). For ease of travel they might select host countries that are near; however, this might affect the number of roles they will be able to fulfil and the opportunities they are offered (Suutari, & Brewster, 2000).

In the case of SIEs jobs are usually not pre-arranged (Inkson et al., 1997), and they normally look for employment themselves in the host countries. Nevertheless, there are exceptions to the rule – some SIEs are remarkably brave and spontaneous (Inkson, & Myers, 2003) in their pursuit of SIE and will go abroad without having arranged for employment beforehand. There is little correspondence between the statement made by Inkson and Myers and the findings of this study, seeing that only three of the participants went abroad without having pre-arranged jobs. The reason could be that, as in the case of the ‘cosmopolitans’ mentioned earlier, their initial motivation was to travel and, in addition, the qualifications of two of them helped them to secure employment without much trouble. However, the third participant had to work her way up and gain experience.

Previous research has focussed on whether SIEs pre-arranged their jobs or not and whether they searched for employment themselves rather than being assigned by an organisation. However, the findings of existing research do not resemble the finding of this study that the initial pull of a host country lies in the fact that an acquaintance already lives in the host country. This phenomenon seems to be related to the concept of headhunting. A finding that resembles the finding of this study the closest is that of Thorn (2009) who has stated that SIE is not always directed but that it is often a combination of the willingness to expatriate on the part of an SIE and the SIE having the right skills and experience required by a host organisation. Indeed, this was the case with the SASIEs concerned in this study. The participants either had the right experience needed and/or the unique attribute of being multi-skilled.

Many SIEs use their professional credentials, previous qualifications, experience and skills to attain and secure work in host countries (Inkson, & Myers, 2003; Richardson, & McKenna, 2002; Richardson, & Zikic, 2007). Research has suggested that there are differences in terms of the length of time of individuals’ expatriation (Myers, & Pringle, 2005). Expatriation can either be long term, which implies that the individual settles and lives in the foreign country, or it can be short term (Thorn, 2009). In the case of short-term SIE, the individual often goes alone, while the partner or family stays behind in the home country (Thorn, 2009). In this respect, the sample group of this study can be said to be short-term SIEs. This conclusion does, however, depend on exactly what is meant by short-term: in the case of this study most of the participants stated that if they returned to

South Africa it would probably only be at retirement age. None of the participants indicated that they planned to return in under three years' time.

For several SIEs the idea of losing their jobs is a constant concern, as this would mean that they would have to return to the home country. This concern makes them cautious both in and outside the work environment (Richardson, & Mallon, 2005; Richardson, & McKenna, 2002). The sample group of this study perceived hard work of a high standard as a means to secure their current positions and to enhance future career opportunities. One of the participants also mentioned that being alone in a foreign country, with no family support should things go wrong, was a constant motivator to achieve success. The literature has also found that many SIEs engage in certain activities and projects in order to enhance their future career opportunities (Richardson, & Mallon, 2005). For similar reasons they also develop professional networks (Richardson, & McKenna, 2002). Thorn (2009) expressed the opinion that the careers and the challenges associated with SIE motivate short-term travellers. Conversely, this study clearly indicated that career development was not the sole pull factor for SASIEs. Together with the challenge of SIE, it did, however, play a significant role. This will be discussed next.

4.5.2.2 International experience

Although career development plays a significant role in SIE, for many SIEs this is not the primary goal for going abroad (Inkson, & Myers, 2003; Richardson, & McKenna, 2002). However, it seems to be the primary goal among professional female SIEs (Fitzgerald, & Howe-Walsh, 2008; Tharenou, 2010). Some women show strategic consideration when deciding which country to expatriate to and they use SIE to enrich themselves both personally and professionally (Fitzgerald, & Howe-Walsh, 2008). Moreover, women expatriate more often on their own initiative rather than wait to be assigned by organisations (Tharenou, 2010). Some SIEs are of the opinion that expatriation might do their careers some good (Richardson, & Mallon, 2005).

Conversely, Al Ariss and Ozbilgin (2010) found that SIE was not helpful for career advancement as far as their sample group were concerned since the majority of them had to settle for employment for which they were overqualified. This might be true for SIEs who expatriate from developing countries to developed countries (Al Ariss, & Ozbilgin, 2010),

however, this was not the finding in this specific study. Nevertheless, the stereotype created by Inkson et al. (1997) that SIE is a process of career development might not apply to all SIEs (Inkson, & Myers, 2003). However, most SIEs are more concerned with building a range of skills, knowledge and experience than they are with the specific industry in which it is obtained (Inkson, & Myers, 2003). These SIEs fall within the definition of boundaryless careerists.

According to Inkson et al. (1997), SIE is a general form of boundaryless career, maybe even the most extreme form (Thorn, 2009). It presents SIEs with the opportunity to develop skills through moving between companies (Thorn, 2009), to be exposed to a wider labour market and to increase their own market value (Thomas et al., 2005). A boundaryless career thus offers greater flexibility for the individual to control his or her own career development (Inkson et al., 1997; Erasmus, & Schenk, 2008). Furthermore, due to globalisation and the new flexible economy (Erasmus, & Schenk, 2008; Thomas et al., 2005), a passageway has been opened up for boundaryless careerists.

In the modern world of work, boundaries of organisations are dissolving (Inkson et al., 1997; Thorn, 2009) thus leading to the expectations and needs of both employers and employees to change, and accordingly causing a new psychological contract to take effect (Erasmus, & Schenk, 2008; Thomas et al., 2005). This means that the traditional working relationship, which consists of loyal employees who conform and are committed to an organisation in exchange for job security and the opportunity to ascend the hierarchy of the organisation (Suutari, & Brewster, 2000), is quickly being phased out. It is being replaced by a new psychological contract that emphasises more individual responsibility, broader skills and competencies, as well as flexibility (Erasmus, & Schenk, 2008). This new relationship has resulted in less certainty and job security, less trust in employment relationships, more flexible employment and working conditions, and reward for performance and individual responsibility for own career development (Erasmus, & Schenk, 2008; Thomas et al., 2005).

Due to the boundaryless career, SIEs' primary goal is their own overall wellbeing; therefore their decisions will not be tied to organisations. Some SIEs might acknowledge the concomitant limitations associated with career advancement, especially when going to a foreign country, but they will go anyway for the personal advantages and development

they can gain (Thomas et al., 2005). This brings us to the next theme, namely life experience.

4.5.2.3 Life experience

Interestingly it seems that, in many cases, life experience is more highly valued than career opportunities (Richardson, & McKenna, 2002; Thorn, 2009). Some of the most common reasons for SIEs to expatriate are to experience some sort of challenge (Fitzgerald, & Howe-Walsh, 2008), search for new experiences, try something different (Inkson et al., 1997; Hu, & Xia, 2010; Richardson, & Mallon, 2005; Richardson, & McKenna, 2002), see more of the world by travelling and experiencing adventures (Thorn, 2009; Richardson, & McKenna, 2002), do inner soul searching (Inkson et al., 1997), or be more independent (Fitzgerald, & Howe-Walsh, 2008). These findings corroborate the findings mentioned in the earlier discussion about the motives of alternative tourists, stimulation seekers, Londoners and explorer academics to embark on SIE.

An interesting quantitative study by Thorn (2009), which involved 2 608 respondents, found that travel opportunities were the biggest motivation for SIE. Secondly, relationships were important, especially in terms of having a partner in the host country. Thirdly, better remuneration was a big consideration, and fourthly, adventure was a drawing card. Thorn listed more than 50 motivations for SIE. Many of these motivations were confirmed in this study, for example, new career challenges, improved economic situation, opportunities for career advancement and the experience of different cultures all ranked among the top ten motivations. International career experience was ranked 20th, and beneficial taxation was number 31 on the list of Thorn's study. Other motivations mentioned by the participants in this study, like better taxation, improved working conditions, escaping from a particular political environment, having many friends overseas as well as the relative geographic isolation of the country were among the 56 motivations for SIE that Thorn listed.

Many of the participants in this study indicated that they had grown tremendously as individuals through their SIE experiences, and this supported the findings in the literature. Personal growth can include a variety of factors, for example improving communication and interpersonal skills (Fitzgerald, & Howe-Walsh, 2008), gaining confidence

(Richardson, & McKenna, 2002) and being more tolerant and patient (Richardson, & McKenna, 2002) towards other cultures and people.

4.5.2.4 Incentives

The last theme under pull factors to the host country is incentives, which include financial benefits, more leisure time and the opportunity to travel and see new places. From the literature it seems that seeing new places is the biggest pull factor amongst SIEs (Richardson, & Mallon, 2005; Thorn, 2009). Loving to travel seems to make the choice of SIE much easier (Fitzgerald, & Howe-Walsh, 2008), and receiving higher remuneration makes the opportunity for travelling more likely. Having more leisure time is not one of the general incentives mentioned in the literature, but it featured as an incentive in this study, perhaps because the participants in the sample group could be labelled as short-term travellers or contract workers. Doing contract work meant that some of the participants had many vacation days, which they used strategically for taxation purposes.

It seems that location can also have an influence on the reasons for SIE, as SIEs who move to Asia seem to do so for economic reasons (higher salaries and tax benefits). Thorn (2009) found that career development is not the primary pull factor for these SIEs. Seeing that the majority of the sample group in this study are situated in Hong Kong, this might explain why similar results were obtained in this study.

Financial benefits are perceived as a key incentive of SIE (Hu, & Xia, 2010; Richardson, & Mallon, 2005; Selmer, & Luring, 2011(b)). In some cases, SIEs are employed under local compensation conditions of the host country (Hu, & Xia, 2010; Suutari, & Brewster, 2000), as was the case with this study's SASIEs; however, in other cases SIEs might be able to negotiate expatriate benefits (Suutari, & Brewster, 2000). The financial benefits offered to SIEs create a problematic scenario for South Africa because it makes it more difficult to retain talent. The remuneration of academics in South Africa is well below that being offered at foreign universities (Maharaj, 2011). Furthermore, a participant indicated that this also applied to the South African mining industry. Maharaj (2011) was of the opinion that this situation could make the professions seem less beneficial, hindering local talent to pursue it and hence affecting the quality of applicants.

4.5.3 Challenges faced in host country

SIE is mostly described as a beneficial experience (Al Ariss, & Ozbilgin, 2010; Scurry et al., 2013; Thorn, 2009), but there is also widespread agreement that SIE involves many challenges (Richardson, & Zikic, 2007). The data analysis of this study revealed a few common challenges experienced by participants and these were grouped into two themes, namely, the lonely foreigner and contract and work permit.

4.5.3.1 The lonely foreigner

Adjustment issues to the host country are faced by SIEs and AEs (Ainuddin, & Lily, 2012). Findings also suggest that irrespective of an SIE being a first-time or a seasoned SIE, previous SIE experience does not make adjusting any easier (Richardson, & Zikic, 2007). The challenges of cross-cultural adjustment are commonly recognised (Maharaj, 2011) in SIE research. Crossing borders leaves you in a foreign place, with new experiences and unfamiliar cultures and languages, which might cause you to experience a culture shock. Culture shock is a diverse and an understudied concept (Robertson et al., 2007).

Culture in itself is a difficult concept to grasp (You et al., 2000) seeing that it represents core values that have developed over a lifetime (Robertson et al., 2007). One would expect that coming from a multi-cultural background SASIEs would find it easier to adapt to and integrate into the host country, but the literature suggests otherwise (You et al., 2000). When certain cultural aspects, for example education, ethnicity, friends, family and religion, are shared by a group of people, a society is created that behaves in a certain way (Robertson et al., 2007). Due to globalisation, organisations are increasingly moving their operations across national borders (Ainuddin, & Lily, 2012; Mayer & Louw, 2011) and individuals from different cultures are becoming more mobile (Richardson, & McKenna, 2002). As a result, people from different cultural backgrounds come into contact and culture clashes might be inevitable. In most instances culture shock influences the outcome of an international assignment, either causing it to fail or to succeed (Robertson et al., 2007).

Furthermore, 'cultural toughness' and 'cultural distance' seem to add to the challenges SIEs face (Richardson, & Zikic, 2007), thus leading to an SIE's perception of being an

outsider. Most SIEs experience some degree of isolation (Richardson, & McKenna, 2002). This could lead to SIEs not forming close friendships (Richardson, & Zikic, 2007) and not integrating into the local community (Richardson, & McKenna, 2002). Many SIEs find that their ability to integrate into the local community is limited, regardless of how long they stay in the host country (Richardson, & McKenna, 2002).

From the data analysis it became clear that the participants in this study had a hard time adjusting to the different culture, work ethic and way of doing things in the host country. Similarly, the literature has established that the biggest frustration of female professional SIEs is the different work ethic, particularly the differences between their own behaviour and attitude regarding work and the behaviour and attitude of the local community (Fitzgerald, & Howe-Walsh, 2008). Thus, adapting to the new work environment is a major challenge. It should also be said that even though the participants in this study mentioned work ethic as being a challenge, it seemed that they adjusted faster and more easily to the workplace than to the rest of the country and the local community.

An interesting finding by Fitzgerald and Howe-Walsh (2008) was that professional females experienced discrimination, however, not because of their gender but because of their identity as an expatriate. Similarly, SIEs from Lebanon experienced discrimination because they were from a developing country (Al Ariss, & Ozbilgin, 2010). Some challenges experienced by academic SIEs included lack of freedom in developing countries, favouritism and corruption in recruitment, selection and promotion. Furthermore, job security and stability were often challenges (Maharaj, 2011).

A major challenge experienced by the SASIEs in this sample group was missing their friends and families back home, as they had expatriated without their partners and families. Doing contract work or being a short-term traveller in a host country (Thorn, 2009) makes it too risky for expatriates to move their homes and families to the host countries, and the SASIEs in this study did not consider doing this. This brings us to the next theme, which is contract work.

4.5.3.2 Contract and work permit

The data analysis showed that all but two of the participants in this study were contract workers. The two participants who were permanent employees nevertheless had to renew their work permits or visas every few years. The contracts of the contract workers varied between six months and three years. Upon looking at the literature to establish the length of foreign assignments it became clear that SIEs tend to work on temporary contracts (Inkson, & Myers, 2003; Richardson, & Mallon, 2005) – a finding which was supported by this study. Furthermore, a study done by Suutari and Brewster (2000) indicated that SIEs are more likely to work for a project type organisation – another finding which was supported by this study as five of the nine participants worked for this type of organisation.

Some of the participants went over on short-term contracts but before the contracts expired it was their responsibility to proactively look for new opportunities and manage their careers. In addition, they had to find new work opportunities before their work visas expired. As was mentioned previously, this was a constant concern for some (Richardson, & McKenna, 2002). It seems that individuals from developing countries have more difficulty than individuals from developed countries in finding work and getting their qualifications recognised (Al Ariss, & Ozbilgin, 2010). Consequently, networking and the right timing (Fitzgerald, & Howe-Walsh, 2008) are two very important factors to manage careers hands-on. This opinion is substantiated by reports in the literature on the common practice among female professional SIEs to network, look for job opportunities and visit host countries prior to expatriation (Fitzgerald, & Howe-Walsh, 2008).

4.5.4 Coping mechanisms / Adjusting to host country

This part of the literature review, as well as the next part about the pull factors of the home country, can be linked to Stage 3 of the three-stage process model of SIEs' career transition; namely embeddedness. According to the literature, SIEs who become strongly embedded in the host country might stay there longer (Tharenou, & Caulfield, 2010). The mechanisms for 'coping' with adjustment issues that came out in this study were organisational support and familiarities.

4.5.4.1 Organisational support

Most of the literature found on organisational support has to do with AEs (Ainuddin, & Lily, 2012; Suutari, & Brewster, 2000) seeing that SIEs are typically self-supporting and have weak organisational attachments (Inkson et al., 1997).

However, one study put forward the suggestion that organisations that employ SIEs should also provide training similar to the pre-departure training that AEs receive (Ainuddin, & Lily, 2012). Ainuddin and Lily have made this suggestion because their study has indicated that there are no differences between AEs and SIEs when it comes to general adjustment, work adjustment and interaction adjustment. General adjustment has to do with adjustment to living conditions (the extent to which an expatriate feels comfortable living in a host country). Work adjustment refers to an SIE's level of comfort with the job tasks to be carried out, and interaction adjustment refers to adjustment concerning relationships established with locals (Ainuddin, & Lily, 2012). Adjustment will be elaborated on in the section below.

4.5.4.2 Familiarities

From the little research that has been done on the topic of adjustment, SIEs' most common way of 'coping' seems to be to make friends with other expatriates (Fitzgerald, & Howe-Walsh, 2008; Richardson, & McKenna, 2002). Some female SIEs have experienced discrimination in terms of their identity as expatriates and have adopted a few 'coping mechanisms' to manage this. They either try to understand or they ignore the locals' point of view and attitudes. However, most resort to getting support from other SIEs (Fitzgerald, & Howe-Walsh, 2008). Richardson and McKenna (2002) found that intimate friendships between expatriates form quickly, which might be attributed to their feeling like outsiders and needing to 'stick together'. Expatriates seem to have more expatriate friends (Fitzgerald, & Howe-Walsh, 2008) than local friends. This was also the case with the SASIEs in this study. It should be noted that an unwillingness to even try and form new friendships has also been found (but not in this study), and this might be a type of 'coping mechanism' used by expatriates in foreign countries (Richardson, & Zikic, 2007).

Willingness or flexibility (You et al., 2000), as well as open-mindedness, might help SIEs to adjust. Normally they are open to experiencing new things and pursuing the challenge of exploring foreign and unfamiliar countries and conditions. However, it is also found that although they might be able to adapt, SIEs will always be foreigners (You et al., 2000) no matter how long they stay in a foreign country (Richardson, & Zikic, 2007). SIEs have been found to be well adapted and happy but not fully integrated into the local community (You et al., 2000).

An article by Robertson et al. (2007) listed some of the things that make adjustment easier for SIEs. Firstly you should do your homework and go over prepared. Secondly you must have a fairly structured arrival plan that includes maps, city tours and locations of expatriate communities, restaurants and pubs. If the local language is not English, get to know a few key phrases to help you get along. Lastly, build networks, not only with other SIEs but also with the local community. It has also been suggested to visit the host country before expatriating (Fitzgerald, & Howe-Walsh, 2008). Some expatriates choose the option of simply moving back to the home country (Robertson et al., 2007). This brings us to the next theme, namely, pull factors of the home country.

4.5.5 Pull factors of home country (South Africa)

As mentioned in the previous chapter there are almost no pull factors for SASIEs back to South Africa. Suutari and Brewster (2000) also found that some of the SIEs in their study had no plans to return to their home country. The initial plan in this study was to focus on 'temporary' repatriation, however, a new concept emerged during the data analysis, namely that of 'conditional' repatriation, which will be discussed next.

4.5.5.1 Conditional repatriation

Repatriation is concerned with the concluding stage of expatriation (Kraimer et al., 2009), in other words the return to the home country. SIEs need strong motivation before they will decide to repatriate (Tharenou, & Caulfield, 2010), perhaps because the decision is not made by an organisation but by an individual (Hu, & Xia, 2010; Suutari, & Brewster, 2000).

As mentioned earlier, the initial focus of the study was on temporary repatriation, which can be described as the return of an individual to the home country (South Africa) for a short period before expatriating again to another country. However, the only reason why four of the participants repatriated to South Africa temporarily was due to the completion of their projects or contracts. These findings might have been influenced by the fact that the rest of the participants were on their first round of SIE. When questioning the participants to ascertain whether there were pull factors back to South Africa, some of the participants indicated that they would return to South Africa on certain terms and conditions, hence it was decided to explore conditional repatriation.

SIEs do not necessarily go abroad for career reasons, nor do they return for career reasons; indications are that they are motivated by family reasons (Inkson, & Myers, 2003). The participants each had their own conditions, as mentioned in the previous chapter, however, securing employment in South Africa before returning was a common condition that was set. Seeing that it is the SIEs' own responsibility to secure employment, it might be that their situation is less certain (Suutari, & Brewster, 2000) than that of AEs. "Similarly, when expatriates expect repatriation to gain them career and lifestyle benefits, when their home country family encourages them to return, and when they identify with their home nationality, they are more inclined to return" (Tharenou, & Caulfield, 2010, p. 1014).

Interestingly, repatriation can be related to embeddedness, dissatisfaction with the host country and shocks, either positive or negative (Tharenou, & Caulfield, 2010). A certain combination of these factors will result in individuals quitting their jobs and leaving their host countries. For example, dissatisfaction proves to be a weaker motivation for repatriation if the individual is strongly embedded. However, weak embeddedness, together with dissatisfaction and a shock, might easily result in repatriation. There is a wide range of shocks that can occur, and these can differ for each individual.

4.6 CONCLUSION

SIE is more common today than ever before, and it will be inclined to escalate as national borders become less important. This chapter aimed to gain a broader understanding of the concept of SIE and of SIEs. Furthermore, it explored the international literature to gain some more insight into the themes that emerged from this study. It can be concluded that SIE presents a range of opportunities to the multi-skilled and highly educated individual as the demand for their expertise expands from a national to an international level. However, this might present South African organisations with both beneficial as well as troubling consequences.

CHAPTER 5: CONCLUSION AND RECOMMENDATIONS

5.1 INTRODUCTION

In this chapter I will discuss the insights and understandings that were gained through this study. I will also address the significant contributions of the study and the shortcomings, and lastly make some suggestions for future research.

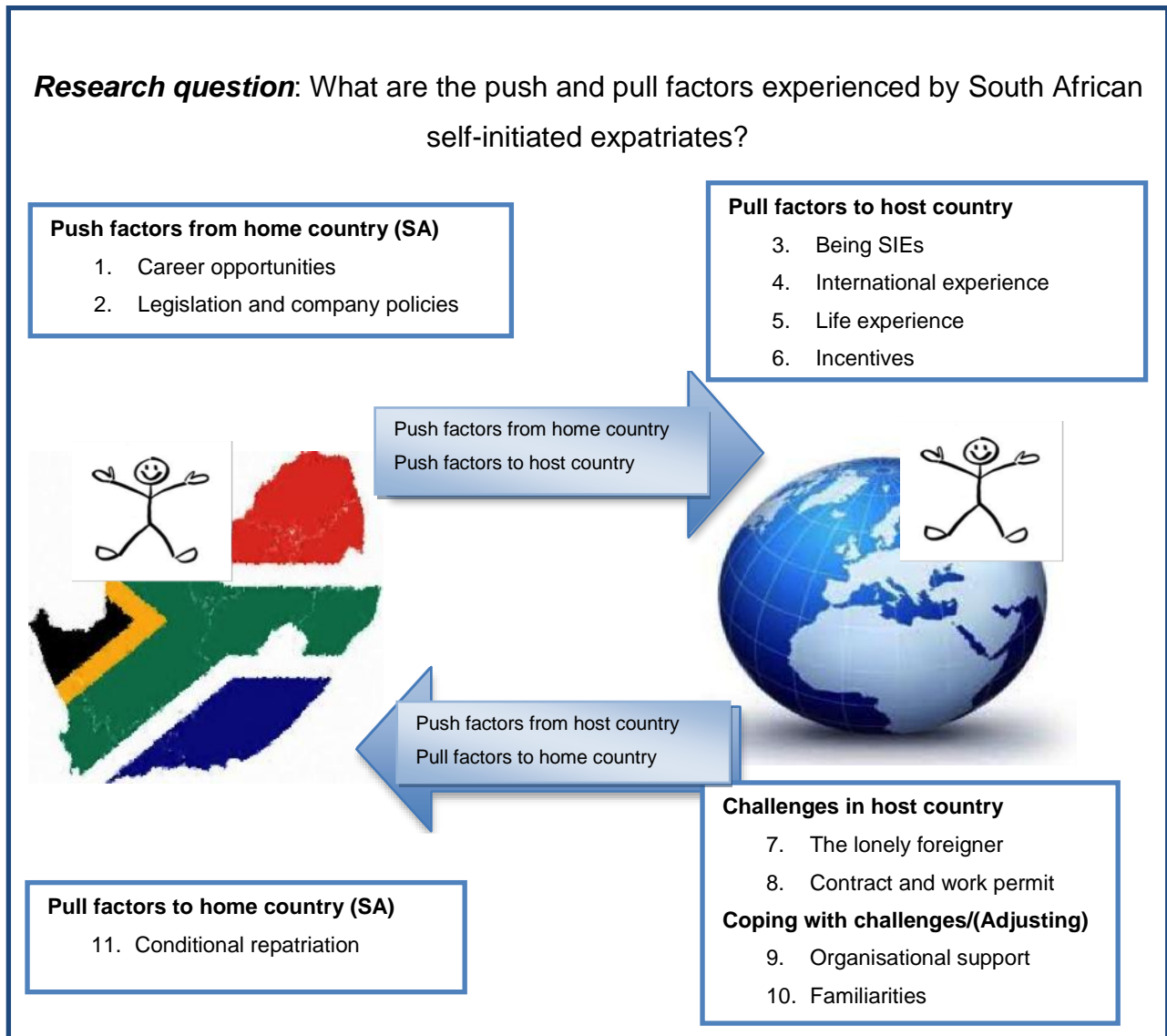
5.2 DISCUSSION OF KEY FINDINGS

In Chapter 1 I shared my personal story and the motivations behind doing this study. My curiosity could not be satisfied by the literature only, hence I embarked on a qualitative method of inquiry to gain an in-depth understanding of the push and pull factors experienced by South African self-initiated expatriates. I created a conceptual framework, which told the story of SASIE and also guided the study. While keeping the conceptual framework of the study in mind I analysed the data, identified the themes that emerged and conducted an extensive literature review to substantiate the findings. The answers to my research question can be seen in Figure 5.1 below, which completes the story of SASIE.

As shown in Figure 5.1, one of the push factors from the home country was a perceived lack of career opportunities when compared to the host country. Furthermore, participants felt that they had stagnated in their careers and had not received enough recognition, appreciation and remuneration for the type and quality of work they had done in South Africa. Another push factor was South African legislation, more specifically legislation involving equity employment, BBBEE and affirmative action. It seemed that the country (South Africa) and the history of apartheid had had an influence on SIEs' decision to go abroad. However, it should be mentioned that these findings might have been the result of the majority of participants being Caucasian (white South Africans).

It can be concluded that although South African SIEs experience certain push factors from the home country (South Africa), there are equally strong – and maybe even stronger – pull factors to the host country, and that these contribute to their decision to expatriate.

Figure 5.1: Conceptual framework completed



To be an SIE you must either be multi-skilled or have a unique contribution to make. Aspects that came out very strongly were the characteristics and the work ethic of South Africans, even though these did not form part of the focus point of my study. Most participants mentioned that there were many opportunities for South Africans in foreign countries due to their work ethic and exposure to a multi-cultural background. Moreover, the majority of the sample group indicated that they had been recruited based on their previous qualifications and experience, thus their recruitment could be linked to the process of being headhunted, and this finding stands in contrast to the finding in the literature that SIEs go abroad independently and without having a pre-arranged job. The SIEs mentioned that their future career opportunities were dependent on their quality of work and the networks and relationships they established during their time abroad. What was important to them was not only transferring their knowledge and skills in the host countries but also gaining more experience themselves. In this sense the majority of the participants can be classified as boundaryless careerists, to whom international experience is a strong pull factor.

Although career development was not the primary motivation for most of the participants to expatriate, it did make a significant contribution to their decision to expatriate. They were attracted by the bigger challenge associated with the new work environment, new work methods and higher level of exposure to different cultures within the workplace. However, their search for new experiences extended beyond the workplace; they wanted to gain life experience.

This desire to gain life experience was found among all the participants, irrespective of race; thus demographics did not have an influence on this finding. As indicated in the literature, SIE provided the participants with the opportunity to experience something new and different that most of them struggled to describe. For some it led to a journey of self-discovery and self-actualisation, and they experienced a sense of accomplishment when they achieved success in the work environment. For the expatriates who had gone to African countries, being able to survive in harsh external conditions provided some satisfaction. Additionally, participants mentioned that they received recognition and appreciation for being knowledgeable in their fields, and that SIE ultimately made them more appreciative of family and friends, as well as of the beauty of South Africa. Other 'incentives' mentioned by all the participants included the opportunity to see more of the

world and to travel. The financial benefits included more beneficial tax rates and being paid in other currencies.

Interestingly, the participants mentioned no real push factors from the host country, but rather challenges that needed to be endured. These challenges concerned culture, religion and language and the fact that they missed their families back home. The participants also referred to work-related challenges: most of the SIEs in this study (all except for two) were contract workers who worked on temporary contracts (this trend is reported on in the literature). Thus, for some of the participants securing future work opportunities was a concern seeing that it is usually SIEs' own responsibility to manage their careers and find employment before their work permits and/or visas expire. Consequently they felt that they worked under a 'time sentence'. These work-related challenges were overcome by developing personal contacts and by networking. Additionally, and in contrast to the literature, some of the participants did receive some form of organisational support, which, however, differed from person to person. It seemed that adjusting to the workplace was easier than adjusting to the host country. The assumption could be made that South Africans are able to adjust quickly to the host country given their multi-cultural background and work experience, yet this sample group indicated that it depended on the open-mindedness, adaptability and other qualities of the individual. Nevertheless, participants managed to adjust more easily through making new friends, mainly with other expatriates.

For none of the participants these challenges were reason enough to pack up and return to the home country. A lack of some of the pull factors in the host country might rather result in repatriation, however, the SIEs were more likely to go to another host country than to return to the home country. Therefore, it seems that South Africa does not offer strong pull factors and that repatriation to South Africa as the home country is based more on sentimental ideals than on whether proper employment can be secured. To conclude, it is important to note that SIEs should still be seen as a heterogeneous group of people, each with their own distinctive characteristics.

5.3 CONTRIBUTION OF THE STUDY

Most of the existing literature on expatriation focusses on assigned expatriates. Consequently, not enough is known about SIEs, who seem to be a unique group, and more research on them is required. The existing literature on SIE is limited; moreover, it is of a quantitative nature and mostly conducted in the academic domain. Thus this study makes a valuable contribution by using qualitative methodology as a means of data inquiry as well as applying the research to a non-academic sample group. As was the case in this study, qualitative research can serve to refine some of the existing theories, for instance, it was found that financial benefits were not always the main motivator to go abroad, as some researchers have suggested. Instead, this study found that money played a motivating role in combination with other (sometimes bigger) pull factors like life experience, international experience and travel opportunities. Nonetheless, it should be noted that the different participants had different primary reasons to expatriate.

The study has furthermore made a significant contribution through providing an in-depth understanding of and insight into the push and pull factors that contribute to South African SIEs' decision to expatriate voluntarily. Moreover, this study seems to be one of the first, if not the first, done in a South African context. In addition, some understanding has been gained about the behaviour of South African SIEs and the influences South African organisations and legislation have on their decision to expatriate. However, the impact of SIE in a South African context still requires further research.

5.4 LIMITATIONS

This study has several limitations. The first one concerns the generalisability of the results because it was done on a relatively small sample group consisting of nine participants. The sample group consisted out of males and females from only two race groups – African and Caucasian – and their ages ranged between 26 and 56. Furthermore, participants were exclusively South African, which implies that the results might not be applicable to other nationalities. The study's use of convenience sampling and the fact that the majority of the participants were expatriates to Hong Kong create further limitations. Thus a wider

spectrum of different host countries should be considered in further research. This study was not 'culture sensitive', and consequently the trends of SIE in respect of the multiple cultural backgrounds found in South Africa were not explored.

Despite its limitations this study provides some additional insights into a lesser known group, namely SIEs, and more specifically understudied South African SIEs.

5.5 RECOMMENDATIONS AND FURTHER RESEARCH

Thorn (2009) stated that some countries are inevitably flooded with skilled, educated and talented individuals from around the world, and these countries are typically richer. Similarly, Maharaj (2011) stated that the talent flow among academic SIEs seems to be directed from the developing countries to the more developed countries. Hence the developing countries and economies will typically experience a significant loss of talent. A concern has been raised about South Africa (a developing country) that is losing many of its talented academics, and this 'brain drain' is weakening educational institutions (Maharaj, 2011). Thus it would be interesting to know what the effects of SIE are on organisations in South Africa and, furthermore, how the negative effects can be countered. It has been suggested that organisational policies should be adapted in order to retain talent (Scurry et al., 2013) or to lure talented people back (Thorn, 2009). This researcher is of the opinion that the impact of legislation should be explored and, based on findings, revised. This could play a significant role in developing and retaining a much needed skilled workforce in South Africa.

This study has brought the worrying dilemma to the fore that life experience and travel opportunities are some of the main attractions of SIE (Thorn, 2009). It is worrying because the South African government and the country's organisations cannot control these factors. Additionally, I suggest that some consideration be given to the differences between foreign talent coming into SA and local talent leaving SA, as well as to the impact that this will have on the South African economy and skilled labour. It would be meaningful to identify why SASIEs have multiple job opportunities abroad, as mentioned by the participants, and how their expertise can be utilised to benefit South Africa rather than to

enrich other countries. However, the 'distance' between the expatriate and the home country needs to be investigated in order to establish whether organisations should have certain policies in place to help the expatriate to readjust to the home country.

Research on cultural issues could provide a valuable resource for exploring the reasons for expatriation and the adjustment of SIEs in the host country. South Africa is a multi-cultural country (known as 'the rainbow nation') and it is possible that each of the nationalities or ethnic groups might have different push and pull factors influencing their decisions regarding SIE. In this study it was noticeable that the pull factors for both the white and black respondents were the same but that there were some differences in terms of the push factors. The Caucasian participants generally had issues with South African legislation and company policies, whereas the African participants did not mention these. Both groups experienced career stagnation and lack of recognition and appreciation from home country organisations. It could be true that the push and pull factors for SASIEs might be culture sensitive rather than a general phenomenon as this study portrays it to be. Additionally, cross-cultural issues could also have an influence on the adjustment of SIEs in host countries. For example, whether an SIE belongs to a collectivist or individualist culture could affect that SIE's acceptance of another culture, as well as the acceptance of and integration into a local community in a host country.

Lastly, an interesting statement was made by one of the participants. This participant believed that the majority of the white male SASIE population had started their careers in the South African Defence Force and, therefore, that they were not scared to go abroad as they knew they would be able to survive in any circumstances. Remarkably, the participants who had expatriated to other African countries stated that they had been in the national defence force or had served on the national border. Thus, a study exploring the different challenges that might be faced by SIEs expatriating to developed countries and those expatriating to developing countries (such as African countries) will be valuable. To conclude, expatriation or global mobility is an exciting field, and more research is encouraged to enhance our understanding through providing some interesting insights into the concept of SIE and into SIEs.

5.6 FINAL CONCLUSION

The primary research objective of this study was to explore the push and pull factors as experienced by South African SIEs and the ways in which these factors contributed to their decision to expatriate voluntarily. It can be concluded that South African self-initiated expatriates in this study experienced certain push factors from the home country (South Africa) but that there were equally strong or stronger pull factors to the host country, all of which contributed to their decision to expatriate. Interestingly they did not indicate any real push factors from the host country, but rather challenges that needed to be endured. Additionally it seemed that South Africa did not offer strong pull factors for this sample group and that repatriation to South Africa as a home country was based more on sentimental ideals. Thus, if South Africa wants to retain its skilled labour or attract the skilled labour who has already expatriated, serious consideration should be given to the reasons for expatriation, especially in regard to SIE.

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APPENDIX A

LETTER OF INFORMED CONSENT

**Informed consent for participation in an academic
research study**

Department of Human Resource Management

**EXPLORING PUSH AND PULL FACTORS EXPERIENCED BY SOUTH AFRICAN
SELF-INITIATED EXPATRIATES**

Research conducted by:

Ms E. Mostert (28024347)

Cell: 082 856 0743

Dear Respondent

You are invited to participate in an academic research study conducted by Elsjé Mostert, a master's student in the Department of Human Resource Management at the University of Pretoria.

The purpose of the study is to explore the push and pull factors experienced by South African self-initiated expatriates.

Please note the following:

- This study involves an anonymous semi-structured interview. Your name will not appear in the final document and the answers you give will be treated as strictly confidential. You cannot be identified in person based on the answers you give.
- Your participation in this study is very important to us. You may, however, choose not to participate and you may also stop participating at any time without any negative consequences.
- Please answer the questions in the interview as completely and honestly as possible. This may take more than 40 to 60 minutes of your time.
- The results of the study will be used for academic purposes only and may be published in an academic journal. We will provide you with a summary of our findings on request.
- Please contact my supervisor, Prof. Y. du Plessis at yvonne.duplessis@up.ac.za if you have any questions or comments regarding the study.

Please sign the form to indicate that:

- You have read and you understand the information provided above.
- You give your consent to participate in the study on a voluntary basis.

Respondent's signature

Date

APPENDIX B

INTERVIEW QUESTIONS GUIDE

INTERVIEW QUESTIONS GUIDE

1. Can you please start by telling me which country you are currently working and living in?
2. Do you enjoy working in this country? Why or why not?
3. Let's go back to the beginning. Can you please tell me the story of how you became a self-initiated expatriate? (See if they give the following information, otherwise ask for it.)
 - How did you find the job in the foreign country?
 - To which country/countries have you expatriated?
 - Please tell me the different career experiences you had in each.
4. What was your motivation behind the expatriation? (See if they give the following information, otherwise ask for it.)
 - Was it because of work or more personal reasons?
 - Was it a strategic career move or more spontaneous?
5. Did your family go with you or did they stay behind? What were the reasons behind this decision?
6. Will you be able to do the same line of work in SA? If not, what are the reasons?
7. What do you think are the benefits of working in a foreign country as opposed to working in SA?
8. What do you think are the challenges of working in a foreign country as opposed to working in SA?
9. In which country did you adapt more easily and why? (See if they give the following information, otherwise ask for it.)
 - Be more specific in terms of the workplace.

- How did you find your feet in the organisation?

10. In which country did you struggle to adapt the most and why?

11. Did you have support from the organisation in the foreign country? (See if they give the following information, otherwise ask for it.)

- In which country?
- What type of support?
- If no support, what type of support would you have enjoyed?

12. Do you think the support or lack of support influenced your adaptation? / How did you manage in the end or what was your resolution?

13. What are your experiences and feelings around working with different cultures and race groups? (See if they give the following information, otherwise ask for it.)

- Your experience of how things are done back at home
- What do you like and dislike working with different people?
- Do you feel that you are treated differently because you are a foreigner? Is it good or bad, and why?

14. Did your previous qualifications and/or experience obtained in SA benefit you in the foreign country/countries?

15. Did your experience and/or qualifications obtained in the foreign country open new doors for you to go further abroad?

16. Do you think there are more career advancement opportunities in your line of work in foreign countries than in SA?

17. Will you return to South Africa permanently? (See if they give the following information, otherwise ask for it.)

- Why or why not?
- When would you if you would?

- If you would not, what should South Africa have to do or offer to have you return permanently?

18. Once your contract ends with your current organisation, what is the next step for you?

19. Do you have any additional comments that you might want to make about anything or about the study?

20. Will you be willing to correspond with me via e-mail if there is maybe something that I need to clarify or probe into a little bit more?

Thank you very much for your time.