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**AN EXPLORATION OF THE PERCEIVED EFFECT OF AN EXPATRIATE
ASSIGNMENT ON THE CAREER DEVELOPMENT OF SKILLED SOUTH
AFRICANS**

BY

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“The world is a book and those who do not travel read only a page”

(St. Augustine)



CONCEPT DECLARATION

I, Hester Helena Jooste, declare that “An exploration of the perceived effect of an expatriate assignment on the career development of skilled South Africans” is my own work. All the resources I used for this study are cited and referred to in the reference list by means of a comprehensive referencing system.

I declare that the content of this research report has never before been used for any qualification at any tertiary institute.

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NAME

15 December 2008

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I, Hester Helena Jooste, declare that the language of this research report has been edited by Louisemarié Combrink.

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The respondents without whose input this research project would not have been possible.

SUMMARY

An exploration of the perceived effect of an expatriate assignment on the career

development of skilled South Africans.

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Career management gains new meaning in the context of employability demands in a global world economy. In this context, increased mobility, a dynamic work environment, and an enhanced level of career support from employers are seen as fundamental aspects of an expatriate's career. This study presents the results of a qualitative research approach that addressed the general question as to how expatriates perceive the effect of their international assignments on their career development. The study followed a descriptive and qualitative research design, using purposive sampling and unstructured interviews to obtain the data. Eighteen participants were identified in a South African-based company operating in Zambia. The study found that expatriates believed that their experience will have a positive effect on their future careers. Some limitations of the study can be said to be reporter bias, the cross-sectional design and self-report interviews which made it impossible for the study to predict whether the expatriates' perceptions would translate into actual benefits in their future career. The positive relationship between expatriate assignments and career development therefore needs to be proved by means of longitudinal empirical research.

Keywords: Expatriate, Career Development, Migration

OPSOMMING

'n Ondersoek na the verwagte effek van ekspatriasie op die loopbaanontwikkeling van geskoolde Suid-Afrikaners.

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Loopbaanontwikkeling verkry 'n nuwe betekenis in die konteks van 'n wêreldekonomie. Sentraal tot internasionale werknemers se loopbane is die toenemende verwagting van internasionale mobiliteit, 'n dinamiese werksomgewing en bykomende ondersteuning vanaf die personeelafdeling en bestuur. Hierdie skripsie bied die resultate van 'n kwalitatiewe beskrywende navorsingstudie. Die studie stel ondersoek in na internasionale werknemers se persepsies oor die effek van hulle internasionale werkseleentheid op hulle toekomstige loopbaanontwikkeling. Ongestruktureerde onderhoude is met agtien internasionale werknemers van 'n Suid-Afrikaanse maatskappy in Zambië gevoer. Die studie het bevind dat die werknemers voel dat die ervaring wat hulle internasionaal opgedoen het, tot hulle voordeel sal strek in hulle loopbane vorentoe. Weens die navorsingsmetode wat gebruik is kon die navorser nie onteenseglik bewys dat internasionale werkservaring wel 'n positiewe effek sal hê op die toekomstige loopbane van internasionale werknemers nie, en verdere empiriese navorsing op 'n groter populasie is nodig om 'n positiewe verhouding tuseen loopbaanontwikkeling en internasionale werkseleentede te bewys.

Sleutel woorde: Ekspatriasie, Loopbaan ontwikkeling, Migrasie

GLOSSARY

Brain Drain: The emigration of skilled or qualified people from one country to another, for better pay, equipment or conditions (Collins, 2007; Oxford, 2006b).

Brain Gain: The immigration of skilled or qualified people into a country attracted by better pay, equipment, or conditions (Collins, 2007; Oxford, 2006b).

Brain Waste: The loss of skill that occurs when skilled workers migrate into employment not necessitating the application of the competence, skills and experience needed in their former job (Morano-Foadi, 2005).

Career Progress: A person's experiences of career progress, inclusive of upward movement, increased competence, expertise and obtaining more expansive experience across multi-cultural career movements (Coetzee & Schreuder, 2006).

Career Resiliency: The capacity to adjust to capriciousness circumstances, by embracing job and organisational changes, welcoming working with new and different people, possessing self-confidence, and being willing to take risks (Coetzee & Schreuder, 2006).

Career Success: The objective and subjective sense of achievement a person experiences in terms of his or her career (Coetzee & Schreuder, 2006).

Competence: The condition of being capable, and having capacity, skill, or the ability to do something correctly or efficiently, or the scope of a person's or a group's ability or knowledge (Collins, 2007; Oxford, 2006).

Competent: Possessing sufficient skill and knowledge for the purpose (Collins, 2007).

Continuous Learning: The process through which one obtains knowledge, skills and abilities, throughout a person's career, in response to, and in expectation of changing performance demands (Coetzee & Schreuder, 2006).

Cope: "To contend, to deal successfully with or handle a situation" (Collins, 2007:372).

Coping: The efforts individuals make to handle circumstances they have deemed as potentially harmful or stressful. Coping can also comprise of perceptual, cognitive or

behavioural responses that are used to manage, avoid or control situations that could be seen as difficult. Problem-focused coping is concentrated at managing and improving an unpleasant experience or reducing the effects thereof. Emotion-focused coping is aimed at limiting the effects of stressful feelings caused by an unpleasant experience through relaxation, the use of alcohol and drugs, social activities, and/or defence mechanisms (Coetzee & Schreuder, 2006).

Cross-Cultural Competence: A person's effectiveness in drawing on a combination of knowledge, skills and personal attributes in order to interact successfully with people from different national cultural backgrounds at home or abroad (Johnson *et al.*, 2006).

Developing Countries: "A non-industrialized poor country that is seeking to develop its resources by industrialization" (Collins, 2007:453).

Emigration: "The act or an instance of emigrating" (Collins, 2007:537).

Emigrant: "A person who leaves one place or country, especially one's native country, to settle in another" (Collins, 2007:537).

Emigrate: "To leave one place or country, especially one's native country, to settle in another" (Collins, 2007:537).

Employability: A person's worth of future career possibilities, which is decided by the acquisition of knowledge, skills, experience and reputation and how that is invested in new employment opportunities that arise (Coetzee & Schreuder, 2006).

General employability: Emotional intelligence or effective self-management; career self-efficacy, career resilience and career decision-making referring to characteristics such as planning, preparing for and adjusting to the requirements of the workplace. These are inclusive of effective work competencies which are seen as imperative in work adjustment. These include: punctuality, honesty, reliability, dependability, initiative, helpfulness, co-operation, willingness to learn, a sense of humour, and moral integrity (Coetzee & Schreuder, 2006).

Globalisation: "The process of enabling financial and investment markets to operate

internationally, largely as a result of deregulation and improved communication. The emergence since the 1980s of a single world market dominated by multinational companies, leading to a diminishing capacity for national governments to control their economies, and the process by which a company, etc. expands to operate internationally” (Collins, 2007:691).

Immigration: “The movement of non-native people into a country in order to settle there” (Collins, 2007:814).

Immigrant: “A person who immigrates, a person who has been settled in a country of which he or she is not a native for less than ten years” (Collins, 2007:814).

Locus of Control: “A cognitive style or personality trait characterized by a generalized expectancy about the relationship between behaviour and the subsequent occurrence of reinforcement in the form of reward and punishment. People with internal locus of control tend to expect reinforcements to be the consequence of their own efforts or behaviour, whereas people with external locus of control expect them to be the consequence of chance, luck, fate, or the actions of powerful others. Between the two extremes lies a continuum of intermediate cognitive styles” (Oxford, 2006:427).

Migrant: Someone entering a country for twelve months or longer (Adamson, 2006)

Migrate: “To go from one region, country, or place of abode to settle in another, especially in a foreign country” (Collins, 2007:1032).

Migration: Is defined by the country of birth rather than citizenship. While citizenship characterises the foreign population, the prevalence of foreign-born individuals is much higher than the number of foreign citizens (World Bank, 2006).

Nation: “An aggregation of people or peoples of one or more cultures, races, etc. organized into a single state, or a community of persons not constituting a state but bound by common descent, language, history, etc.; a federation of tribes, or the territory occupied by such a federation” (Collins, 2007:1083).

Occupational-Specific Skills: Skills pertaining to the task at hand, or role to be

performed, inclusive of previous experience, continuous education, development and training, problem- and decision-making skills as well as the capacity to work in teams (Coetzee & Schreuder, 2006).

OECD: Organisation for Economic Cooperation and Development, an alliance of 30 states to encourage growth and trade, set up in 1961 to take the place of the OEEC (Collins, 2007). The thirty OECD countries are: Australia, Austria, Belgium, Canada, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, the Republic of Korea, Luxembourg, Mexico, the Netherlands, New Zealand, Norway, Poland, Portugal, the Slovak Republic, Spain, Sweden, Switzerland, Turkey, the United Kingdom, and the United States (World Bank, 2006:188).

Optimism: Associated with good mood, perseverance and health. Learned optimism relates to an optimistic explanatory style. Dispositional optimism is defined as a global expectation that good things will be plentiful in the future and that bad things will be scarce. Optimists tend to approach challenges with confidence and persistence, while pessimists are doubtful and hesitant. Optimists assume that they can handle adversity successfully. They experience less distress than pessimists who typically anticipate disaster (Coetzee & Schreuder, 2006).

Psychological Contract: A collaboration defined by conditional attachment arrangements (Coetzee & Schreuder, 2006).

Resilient: “Recovering easily and quickly from shock, illness, hardship, etc.; irrepressible” (Collins, 2007:1375).

Self-efficacy: “The ability to attain the desired results. Perceived self-efficacy incorporates beliefs about or competence to bring about intended results. Beliefs in one's capabilities to muster the motivation, cognitive resources, and courses of action needed to rise up to organisational challenges. Also, individuals' perception of their capabilities to affect the environment and the way in which they control their actions to generate the desired outcomes. Self-efficacy is a belief in the possibility that one can successfully execute some future action or task to achieve a desired outcome. Inefficacious thoughts could cause distress and depression, leading to reduced levels of satisfaction. High self-efficacy includes repeated success at a

specific task, and the accumulation of successful experiences leading to positive self-images (Coetzee & Schreuder, 2006; Oxford, 2007).

Sense of Coherence: A global point of reference that expresses the extent to which one has a persistent, enduring though dynamic feeling of confidence that 1) the stimuli coming from one's internal and external environments in the course of living are structured, predictable and explicable; 2) the necessary resources are available to one to meet the demands posed by these stimuli; and 3) these demands are challenges worthy of investment. Individuals with a strong sense of coherence are able to make cognitive sense of the workplace, and experience their work as consisting of experiences that are bearable with which they can cope, and as challenges that they can meet" (Coetzee & Schreuder, 2006).

Skill: "Special ability in a task, sport etc. especially the ability acquired by training; something, especially a trade or technique, requiring special training or manual proficiency" (Collins, 2007:1510).

Skilled: Possessing or demonstrating accomplishment, skill, or special training requiring special abilities or training, the ability to do something well; expertise or dexterity (Collins, 2007; Oxford, 2006b).

Unskilled: "Not having or requiring any special skill or training, having or displaying no skill, inexpert" (Collins, 2007:1761).

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Permanent or long-term migration between countries or across continents is not a new phenomenon; however, short-term migration is a growing trend with the rise of globalisation. As with any work experience, this study is conducted from the stance that the exposure gained while working in a foreign country may make a valuable contribution to the career development of individuals upon return to their own country.

This chapter presents a broad overview of the problem statement and significance of the study, the methodology used and the basic chapter layout.

1.1 Problem Statement

Working as an expatriate is becoming an integral part of the lives of many with the rise of globalisation. On the surface this may seem like an acceptable solution for a number of the challenges that the world and individuals face. On a macro-level, many developed nations are experiencing a shortage of skilled people, and many developing nations fail to provide their skilled people with adequate career opportunities. Globalisation encourages the movement of people between nations, providing developed economies with an additional workforce and relieving developing economies of their surplus labour. On a micro-level, many individuals regard work opportunities in a foreign country as a viable solution for personal challenges.

The problem presents itself when the assumption is made on both the macro and the micro-levels that globalisation levelled the playing field. Globalisation has contributed significantly to create international interdependence between economies; remove many obstacles to the movement of capital, goods and services; increase the movement of people; making communication networks fast and accessible to many and also managed to connect the economies and politics of countries - where the decisions of leaders not only impact their own nations, but on almost every nation in the world. Global companies, international travel and cross-cultural networks between people made people across the world more aware of cultural differences. The international broadcasting of, among others, wars, terrorism, genocides and human trafficking made concepts such as slavery, racism, oppression of people and wars unpopular, giving rise to an international outcry to end crimes against humanity, and it also created a universal need for developing globally agreed upon basic human rights. At face value, it seems easy to arrive at the conclusion that all peoples'

basic human rights are protected, that wealth is more evenly distributed, that people can easily move to nations with better career opportunities, that the problem of shortage of skills in one nation is answered by the unemployment problem in another. It may also seem as if people are more aware of differences between cultures, and are therefore more tolerant towards other culture groups, to give but a few examples. Unfortunately, these things remain elusive for many, and the reality is that globalisation probably has as many failures as it has had successes, and that it has bred equally many losers and winners.

Where globalisation has contributed much towards paving the way regarding the above issues, an enormous amount of work remains to be done with a view to turn the promises of globalisation into practical and workable solutions. In the context of career development, this means that even though globalisation facilitated unprecedented exposure to international work opportunities and foreign cultures, it does not guarantee that exposure would translate into beneficial experiences or changed behaviours. It also does not follow that individuals will be as safe as they anticipated, earn as much money as they hoped for, or find the jobs they dreamed about. Globalisation and, subsequently, expatriation, has their own price tags.

1.2 Significance of the Study

With the effects of globalisation transcending to almost every corner of the world and in most spheres of life, one has to consider what the consequences are for individual career management. This study aims to provide insight into the perceived effects and potential benefits of an expatriate assignment on the career development of South Africans. What employees and employers need to know is whether or not the simple reality of exposure to an international work environment would be beneficial to an employee's career development. The answer to this question is important because if we answer yes, it logically follows that international assignments should form an integral part of high potential employee's development. However, should the answer be no, then Human Resource and front line managers will have to find ways to facilitate expatriates through their international assignment, in order to assist them in turning their exposure into a meaningful experience and consequently help them to firstly acquire new competencies and behaviours, and secondly to translate what they have learned into something they can use in various contexts.

1.3 Research Methodology

The purpose of this study is to describe the opportunities that expatriates are exposed to on short-term international assignments and the perceived effect thereof on their career development. The emphasis is on describing the exposure opportunities and linking that exposure to a cognitive understanding of possible benefits for their future career.

The researcher conducted a qualitative study, following an explorative descriptive approach. A purposive sampling approach was used. Candidates were selected from a group of expatriates working in an African country in the mining industry as earthmoving equipment technicians. Chapter Four will discuss the research methodology in detail.

1.4 Overview of Chapter Layout

Chapter Two presents a discussion on globalisation and the international demand for labour. Attention will be paid to the role of nation-states and governments in migration, as well as the history of migration movements. The chapter will further explore the various modes of migration, the reasons why people migrate, the consequences of migration for migrants and the effect of migration on sending and receiving countries.

Chapter Three will explore career development in the 21st century as well as the concepts of career management versus career development, characteristics of expatriates, cross-cultural competence, expatriate adjustment and the role of multi-national companies and human resources in expatriate management.

Chapter Four presents the research methodology, the focus of the study, methods of investigations, the research design, participant selection, data analysis and ethical issues surrounding the study.

Chapter Five presents the results and findings, practical implications and limitations of the study as well as recommendations for future research.

2 Chapter 2: Globalisation and International Demand for Labour



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2.1 Introduction to Globalisation

Globalisation can be defined as movement or advancement towards an open market and a one-world economy, where goods and services can freely move between nations, where governments are actively removing obstacles, resulting in the interdependence of nation economies (Lu, 2001; Dauvergne 2004).

This phenomenon has been pertinent in academic and public debates for the past three decades. Dauvergne (2004) points out that some participants ask if globalisation can even be said to exist in the sense of constituting something new in social and political ordering. Dauvergne does not dispute that the movement towards a one-world economy is taking place, what he is suggesting, however, is that this might not be an exclusively 21st century trend.

The concept of globalisation is complex and emotion-riddled. Ultimately, it may mean different things to different people, yet it is inevitable that it will demand a world government, regulating global markets. Central to this debate are the notions of the nation state and migration (Dauvergne, 2004); the nation state because globalisation threatens its reason for existence and this has increased the need for democratic institutions of global governance (Griffin, 2004); and migration, because in essence the theory of globalisation centres around movement of all kinds –such as people, capital, goods and services (Dauvergne, 2004).

In essence, globalisation is fuelled and shaped by the need of companies to sell their products and services internationally or to purchase services and products on the international market. Although the movement of people from one geographical area to another is not new, the dynamics surrounding the movement are. Never before has the world been so connected that economic and political decisions made in one country can build or break the economy of the rest of the world. For example, the collapse of Enron and other companies in 2001 changed the way in which the world looked at the responsibility of directors and the CEO, and in South Africa it resulted in the establishment of the King Commission and ultimately the King Code. Another example is the credit crunch: as a result of a long chain of events in the United States of America, America and the rest of the world are on the brink of a recession. It is very likely that the way the world looks at credit, investments and banking will change

dramatically in the foreseeable future.

This chapter presents a discussion of the various aspects of globalisation. This discussion commences by looking at what constitutes a nation-state and what the rights and responsibilities of the government of such a state would be, and also at the impact of globalisation on nation-states. Taking into consideration that we live in a world divided by borders, what are the various options available today for those who want to leave their place of birth and relocate to another country? Why do people want to migrate in the first instance? Thus, to quote the familiar saying, is the grass always greener on the other side? And, lastly, what are the effects of migration on nation-states? It is important to discuss these concepts because globalisation is key to understanding the complex context in which multi-national companies function, and by extension the dynamic forces that impact on an expatriate's life-world. As an expatriate in a multi-national company one not only has to negotiate the laws and culture of one's own country but also that of the country in which one operates.

2.2 Globalisation and the Nation-State

2.2.1 What is a Nation-State?

On December 26, 1933 the Montevideo Convention defined a nation-state as a sole person under international law with a permanent population, a defined territory and a government with the capacity to enter into relations with other states. It further awarded nation-states with the right to defend its integrity and independence; provide for its conservation and prosperity; legislate upon its own interests; administer services and to define the jurisdiction and competence of its courts (Yale Law School, n.d.).

Nation states execute these rights through government. Government can be defined as the governing body of a state or a group, that has the power and authority to enforce systems, laws and rules that govern the people associated with it (Oxford, 2006b).

2.2.2 What is Globalisation?

Globalisation is the process where financial and investment markets are empowered to operate on a global level. This is made possible through deregulation and improved communication, resulting in the emergence of a single world market with

multi-national companies as the primary catalyst, and a diminished capacity for national governments to control their economies (Collins, 2007:691; Oxford, 2006:605).

2.2.3 Nation-State and Globalisation

The central theme of globalisation is fluidity; increasingly more things are moving at accelerating rates (Dauvergne, 2004). Globalisation made it relatively easy for organisations and individuals to transfer money, goods and services between countries (legally or illegally), reducing the state's ability to control capital (Griffin, 2004). Society and the economy are consequently more international and interdependent, with political and economic decisions increasingly shaped internationally. The global sphere tends to be more dynamic than nation states, and governments have a propensity to shift the responsibility of perceived difficult decisions to a global arena, resulting in a greater distance between citizens and the decision-making process (Eichenberger & Frey, 2002).

Globalisation is compelling the world at large to become more interdependent by promoting cooperation between nation-state governments and international and regional organisations. However, globalisation also gives rise to new problems because it is clear that participation in a global world will involve a new set of parameters; and here the question is, who is responsible for setting these parameters? As such, globalisation is seen as threatening nation-states. There are two popular reactions to this dilemma: some propose a one world government whereas others suggest that the dynamics of a free global market is the answer (Eichenberger & Frey, 2002).

2.2.4 A World Government

Urry (2004) calls this world government an 'empire', a singular system of power, a 'smooth world', without a centre of power and with no fixed boundaries or barriers where all is movement, committed to the rule of law, human rights and democratic procedures (Eichenberger & Frey, 2002).

This naturally implies new levels of decision-making. The dominant role of the nation-state is diminishing (not only because of globalisation but also due to regional agreements), and increasingly political action is shifted to multiple levels even though

the state remains the most important level of power (Castles, 1998). The result of this situation is a decision-making process further removed from citizens, who, in turn, justly feel a lack of trust in politics in general due to a loss of control over decisions taken in the respective supra-national and inter-jurisdictional bodies. Contrary to citizens, shifting decisions upwards is preferred by politicians, as this allows them to better pursue their own goals and what they believe to be in the interest of the countries they represent, without always having to go through a costly and lengthy process of seeking the approval of citizens (Eichenberger & Frey, 2002).

Eichenberger and Frey (2002) rightly warn that it cannot be assumed that all politicians are benevolent, and that all role-players in the 'empire' behave purely altruistically, and therefore there should be a system that holds politicians accountable for decisions. It is unrealistic to expect a world government to superimpose a power structure on existing nation-states without considering where the power should originate from, and that this government would act in the global interest. The reality is that even representative democratic governments fail to provide true democratic governance, typically due to its distance from citizens and its monopoly of power.

Unfortunately, what appears rational at global level may be devastating for local communities (Castles, 1998). Formal decision-making at a global level should be based on democratic principles before it will be accepted by citizens (Eichenberger & Frey, 2002). For the benefits of global integration to reach to individual citizens, ways have to be found to provide local communities with a powerful voice in decisions that would affect them (Castles, 1998).

2.2.5 The Global Market

In essence, globalisation is an economic model, based on a global market, resulting in winners and losers. These processes that include some and exclude others appear to be the work of anonymous market forces (Castles, 1998).

Even though globalisation has world-wide impact, concerns vary depending on the locality. The developed world is concerned that they may have to sacrifice national institutions in order to fulfil international treaty obligations, and the developing world's primary suspicion is that "globalisation is a game played by the rich for the rich; it may benefit the rich but not the poor in poor countries" (Castles, 1998).

Market lobbyists believe that the global market can essentially solve all the problems related to it, provided that government does not interfere. They concede that there needs to be some rules as part of the game, yet they feel that these rules would emerge endogenously as a result of international competition (Eichenberger & Frey, 2002).

A significant consequence of economic markets, both at the national and international levels, is that gross disproportion is not seen as a key concern by many of those in power (Castles, 1998). It seems obvious that a global world market may pay little attention to the traditional problems of market failure leading to monopolistic structures, far-reaching negative external consequences, inadequate supply of public goods as well as an income distribution between regions and individuals that is undesirable from almost all sides of the fence (Eichenberger & Frey, 2002). Furthermore, it seems unlikely that any individual, institution or state will assume responsibility for developments that may impoverish millions (Castles, 1998). It can even be construed as naïve to expect that global economic markets will ever persuade governments to provide public goods effectively. There is, consequently, very little reason why competition among national governments should work perfectly. However, even in the absence of a central force governing the world economy, powerful sanctions are imposed on critics of the new market reality (Eichenberger & Frey, 2002, Castles, 1998). How governments perceive the effect of globalisation will greatly influence how they legislate. Governments that fear globalisation will make it increasingly difficult for multi-national companies to set up businesses within their borders, and are likely to be more hostile towards expatriates.

2.3 Migration and Globalisation

2.3.1 Formation of a Nation-State

One could perhaps attempt to imagine a world where there is no borders, no restrictions to movement, where people could live anywhere they wanted and traded with anyone they wanted to, where demand and supply is the rule of law, and all people live in liberty. Idealistically, this is the dream of globalisation. The presence of the dream, however, constitutes its absence in reality. We live in a world divided into nations, but how did nations as we know them come into being?

Nation-formation is a process that involved the occupation of a specific territory and the subsequent amalgamation of the various local ethnic groups into a single national identity. Cultural and political unity has been dovetailed with nation-states, with citizens concurrently belonging to both a political and cultural community, consequently resulting in a paradox, because as a member of the political community, citizens are seen as equal and their personal characteristics (gender, ethnicity and religion and so forth) are immaterial, while membership to the national community assumes a shared possession of allegedly unique cultural characteristics. Cultural homogeneity is thus invented and is easily jeopardised by immigration and ethnic diversity that allow for a nation of people without common ethnic origins (Castles, 2000).

During the twentieth century migration and nation became deeply intertwined, with control over migration at the core of being a nation. The essence of what needs to be controlled in the nation state differ, in terms of people, borders or the monopoly over coercive power (Dauvergne, 2004).

If a prerequisite for the existence of a nation is both members and boundaries, migration law will take central stage. It distinguishes between members and others, and it makes the border significant for people trying to cross it. Therefore membership must be established before the questions of justice can be addressed; migration law together with citizenship law must resolve the membership question. While the debate over whether borders should be mostly open or closed to migrants is heating up, two things most parties agree upon is that there must be a border, and that rules for opening and closing the border should be based on national self-interest or self-identification (Dauvergne, 2004). Migration and citizenship laws are of the utmost importance to multi-national companies and expatriates, because these laws determine whether or not people from the sending country are welcome in the host country and how they will be treated once there.

2.3.2 Border Control

The regulation of migration is something that appeared on the world agenda during the course of the twentieth century. Certainly passports and border controls emerged at an earlier point in time; however, it was not until the beginning of the twentieth century that the world was completely divided by borders, with passports and visas required to cross these borders (Dauvergne, 2004). Whereas states (and the system

of international law and sovereignty that developed with them and helped to sustain them) managed for centuries without comprehensive migration regulation, control over borders and the movement of people has become the last bastion of sovereignty (Dauvergne, 2004; Adamson, 2006). Border control is of paramount importance to nations, because this allows them control over their populations, limiting access to labour markets and public goods, and maintaining internal security (Adamson, 2006).

As nations have seen their absolute power to determine the flows of money or ideas and to set economic or cultural policies slip away, they are clinging to migration laws and policies to assert their “nation-ness” and to demonstrate their sovereign control and capacity (Dauvergne, 2004). National migration policies usually have two aims: determining which categories of migrants to let in, and which to keep out (Adamson, 2006). However, trans-national migration is slowly eroding the traditional basis of nation-state membership, as rights are increasingly based on residency and not on citizen status, diminishing the distinction between ‘citizen’ and ‘alien’ (Castles, 1998).

2.3.3 Migration, Nation-States and Global Markets

The state’s ability to control what the population sees, thinks and reads has been greatly reduced by developments in information technology and the increased speed as well as reduced cost of transmitting information from one part of the globe to another (Griffen, 2004). As economies are becoming more reliant on knowledge workers, the loss of their best-trained workers may cause serious threats to national productivity and output (Ouaked, 2002). Like trade, migration distributes the resources of humankind that, in theory, may allow more efficient production (Griswold, 2003).

Of course, not everyone affected by migration view it in the same way. States of origin may view the immigration of skilled nationals as a loss of educational investment, where employers in receiving countries would regard this as gain (Castles, 1998; Tansel 2003). The reverse is true for unskilled nationals, where sending countries may encourage them to leave, since this can possibly result in remittances and ease social pressures, whereas governments of receiving countries are less willing to accept them, but may turn a blind eye if employers need labour (Castles, 1998).

Governments that try to halt migration are faced with the global migration market organised by recruiters and migrant agents who can make a profit out of international migration. This market is associated with unofficial migration networks, sometimes referred to as diasporas, which develop within the migratory process. Collectively, migration networks and the migration industry may be more influential in determining population flows than the policies of nations. Governments that welcome the mobility of capital, commodities and ideas are unlikely to succeed if they try to stop the mobility of people. It is possible that realistic policies may help to shape migration in public interest, whereas prohibitions are unlikely to stop it - prohibitions may simply change legal movements into illegal ones. Unfortunately, the simple reality that large numbers of people have to cross borders in the pursuit of a reasonable livelihood, exposes the inability of the state to influence economic development, and this may ultimately lead to a crisis of confidence in the state (Castles, 2000).

Adam Smith in his book *'The wealth of Nations'* argued that limitations on the movement of labour inhibit economic advancement in ways similar to the limitation on the movement of goods and capital (Griswold, 2003). One may wonder why the focus is so strongly on migration. This is because it plays a central part in most present-day social transformations (Castles, 1998). Migration is both a consequence of global change, and an authoritative force for continued change in migrant-sending and receiving countries (Castles, 1998).

Migration in itself might never have been a goal, yet it is unavoidable in a global world. In the words of Griswold (2003), migration became the unwelcome stepchild of globalisation. Migrants therefore often find themselves in a place of uncertain jurisdiction and little, if any power to influence the government of their country of residence.

2.3.4 Human Rights and Migration

One of the great triumphs of the nation-state model is the concept of democratic citizens who are the bearers of certain basic rights and active participants in the process of law-making and governing (Castles, 1998). The devaluation of 'citizenship' and the continued emphasis on residency moved international human rights codes, with its 25 premises of universal 'personhood', to the forefront. Increasingly social, civil, economic and even political rights are based on residency and not on citizenship (Hansen, 1999). This shift has far-reaching affects for national

identity and for defining who “belongs” - and who doesn't.

One of the primary goals of nation-formation was the development of a national identity that would be shared by all citizens. This identity would be founded on common interests and goals, and on a long process of forgetting differences. This was, however, not always feasible, since minority ethnic groups proved much more resilient than anticipated. Creating this national identity becomes even more difficult with porous borders, and the concomitant growth in ethno-cultural diversity in many states. In a world divided up into nation-states, remaining in one's country of birth is regarded as the norm and moving to another country as a deviation. However, it is not unheard of to find people who commute between countries, and who maintain family, social and economic links in both their home and destination countries, resulting in people who have multiple identities and trans-cultural competencies. Dual citizenship and cross-cultural marriages add to the notion that expecting each person to belong politically and culturally to just one nation-state is an unworkable situation (Castles, 1998). Migration unavoidably leads to larger ethno-cultural diversity within nation-states, altering identities and blurring traditional boundaries. (Castles, 1998; World Bank, 2006). It can be argued that we need a new model of global citizenship, one that severs the link between belonging and territoriality. In other words, people need rights based on their humanity and not on their nationality (Castles, 1998). Nation-states are realising that sovereignty is lodged in people rather than in place (Dauvergne, 2004).

At the core of human nature is people's desire to move from place to place in a never-ending pursuit of a better life (United Nations, 2002). Freedom of movement is therefore an integral part of the broader package of human emancipation that cultivates development (Griswold, 2003). The right to move was acknowledged globally over half a century ago with the acceptance of the Universal Declaration of Human Rights, stating in Article 13 that every person has the right to leave any country, including their own, and to return to their country (United Nations, 2002).

Human rights are universal with the central notion that certain principles are true and valid for all people, in all societies, under all conditions of economic, political, ethnic and cultural life. These rights are inseparable because political and civil rights cannot be divorced from social and cultural rights; and also incontrovertible – they cannot be denied to any human being (Taran, 2000). The 1990 Convention of the 'Protection of

the Rights of All Migrant Workers and Members of Their Families' has been adopted as one of the seven fundamental human rights instruments that describe basic as well as universal rights and warrant their explicit extension to vulnerable groups worldwide (United Nations 2002). The others are the International Covenant on Civil and Political Rights, the International Covenant on Economic, Social and Cultural Rights, the Convention for the Elimination of Racism and Racial Discrimination, the Convention against torture (CAT), the Convention for the Elimination of Discrimination Against Women (CEDAW), and the Convention on the Rights of the Child (CRC) (Taran, 2000).

Taran (2000) notes seven important aims of the 1990 Convention:

1. Expatriate workers are social entities with families who have rights, including that of family reunification, and they should be viewed as more than economic entities and labourers.
2. They acknowledge that expatriates and their family members, being non-nationals living in states of employment or in transit are not protected, and their rights are often not addressed by the national legislation of the receiving state or their own states.
3. It creates international standards of treatment through the explanation of particular human rights of migrants, and provides definitions for migrant workers as well as different categories.
4. Essential human rights are extended to all migrant workers, be these legal or illegal, with additional rights for legal expatriates.
5. The Convention aims to participate in preventing and eliminating the exploitation of expatriates, and seeks to bring an end to illegal movements and irregular or undocumented situations.
6. It endeavours to prescribe a minimum standard or protection for expatriates (and other migration categories) that are universally adopted, and that would serve as a mechanism to encourage those states lacking national standards to bring their legislation in line with international standards.
7. Even though the Convention exclusively addresses expatriates (migrant workers) and members of their families, incorporation may provide a noteworthy measure towards protection for the basic rights of nearly all other migrants in vulnerable situations, especially those who are part of irregular movements.

In virtually every country that has developed, people moved: from the countryside to cities and even between countries. With labour becoming increasingly mobile, today's tight constraints on migration can be said to limit an essential human freedom (Griffin, 2004; Griswold, 2003). At the same time it is important to note that contemporary migration is neither unidirectional nor final; rather, it is multiple: circular with return migrations, instead of the traditional singular great journey from one sedentary place to another, and occurring across trans-national spaces (Tseng, 2000). Consequently, a number of people are living dual lives, speaking two languages, have homes in two countries and are making a living through continuous regular contact across national borders (Portes *et al.* in Tseng, 2000). Taking this into consideration, it is important to adopt a trans-nationalist perspective with a view to understand the complexities of the contemporary expatriate as well as expatriation as a modern-day movement of people.

2.4 Migration Then and Now

Most major migration flows in history have been linked to forced migration or expulsion, with the Jewish Diaspora after the destruction of Jerusalem in 586 B.C., the mass migration flows during the Trans-Atlantic slave trade with 15 million Africans displaced to America, and the Greece-Turkey population exchanges after World War II, to name a few (Adamson, 2006).

The international scene changed after World War II, when Continental Europe entered thirty years of unprecedented growth and a concomitant demand for labour that could no longer be satisfied domestically (Hansen, 2003). Europe was an emigration region from 1880 – 1930 (with approximately 44 million Europeans leaving their homelands) and changed during 1930 - 1950 to become an immigration region with inflows from less developed countries (Olesen, 2002). Notable in this regard is, for example, that the German economy started to recover after the currency reform in 1948, and by the mid 1950's Germany - alongside the rest of Europe - had a booming economy (Olesen, 2002 & Hansen, 2003).

International migration was destined to play an important role in population

redistribution, with countries like Germany implementing a guest worker scheme where workers could remain as long as there were jobs for them, but would return once the economy soured (Hansen, 2003; Appleyard, 2001). Many Europeans saw emigration as a way out of hardship, and by the 1960's hundreds of thousands of guest workers, mainly from Southern Eastern Europe, had filled jobs for which locals could not be found (Appleyard, 2001).

During the same period, for reasons unrelated to migration, the British government adopted legislation that allowed all subjects of the United Kingdom and the Colonies the right to enter the United Kingdom and enjoy all social, political and economic rights (Hansen, 2003).

When Europe experienced its first recession in 1967, the guest worker scheme adopted by various West European countries seemed to work, with many workers returning home with the knowledge that they could come back once the economy picked up again (Hansen, 2003). In the context of a slowing economy, the 'oil-crisis' and the rising numbers of guest workers, most countries ended primary migration in the early 1970s (Hansen, 2003). By that point in time, colonial migrants had entered mainly as citizens, and as such argued for the right to family reunification (Hansen, 2003).

The fall of the Berlin Wall, the collapse of the Soviet Union and economic reforms in India, China, Brazil, Mexico, Turkey to name a few, ushered in a new era during the early 90s. During that season the world underwent a transformation from having been divided to becoming integrated. Within a decade, those populations living in economies involved in market-orientated reforms increased from around one billion to five-and-half billion (Lehman, 2001).

It is clear that a new global migration system is emerging when glancing over migration trends of the last 50 years. The globalisation of migration implies that migration has become a truly worldwide phenomenon, affecting all parts of the world to a greater or lesser extent (Crush & Frayne, 2007). Today it is hard to find a village, town, city, state or part of the world that is not importing or exporting labour or, in most instances, involved in both (Adamson, 2006; Crush & Frayne, 2007). All major regions, continents and most states have recently experienced an increase in the number of migrants they accommodate in their countries (Crush & Frayne, 2007).

Regarding the notions of global markets and an international government, various international bodies have been established since World War II. The Uruguay Round GATT (General Agreement on Tariffs and Trade) negotiations (1986-1993) were finally completed in the wake of the Berlin Wall falling, and in 1995 the World Trade Organisation (WTO) was established. In 1990 GATT had 90 members (Lehman, 2001), but by 2006 the WTO that replaced GATT had 150 members (WTO, 2007). Both organisations were founded on liberalism, multilateralism and the belief that a global trade system requires rules and regulations to prevent abuses (Lehman, 2001). The WTO describes itself as the only global international organisation dealing with the rules of trade between nations. At its heart are the WTO agreements, negotiated and signed by the bulk of the world's trading nations and ratified in their parliaments. The goal is to help producers of goods and services, exporters, and importers to conduct their business. WTO's main function is to ensure that trade flows as smoothly, predictably and freely as possible. It does this by administering trade agreements, acting as a forum for trade negotiations, settling trade disputes, reviewing national trade policies, assisting developing countries in trade policy issues through technical assistance and training programmes and cooperating with other international organisations (WTO, 2007).

The 1990s will thus largely be remembered for geopolitical and geo-economic shifts, with the collapse of the Soviet Union, the end of the Cold War and the establishment of a globally integrated economy regulated by the WTO (Lehman, 2001). Predictions are that the coming decades would be marked by large-scale demographic changes, with rapidly ageing populations. The reason for the demographic changes is that while populations in industrialised countries are getting older, the same is not necessarily true for developing countries. The following example illustrates this point well.

Frankfurt is full of old men and women milling around, and Cairo is packed with throngs of young people. In the years ahead Frankfurt will see more and more old men and women, and Cairo will see more and more young people. In 2000, Germany had a population of 82 million, while Egypt had 68 million. By 2030 Egypt's population would increase to 92 million, and Germany would decrease to 74 million, leaving Egypt with 18 million more people than Germany (Lehman, 2001:73-74).

It is true that larger populations account for larger economies, mainly because the

more people there are the greater the demand; be that consumption, housing or investment. Furthermore, larger populations are in the position to contribute more workers to the workforce (Junankar, Pope & Withers, 1998). Therefore the size of a nation's population alongside natural resources, territory, economy and military is among the fundamental measures of its power (Adamson, 2006). A nation's population may potentially be its most valuable asset, but this is greatly influenced by demographics (Adamson, 2006). The population ageing process and the ensuing drop of the number of young workers joining the labour market annually represent one of the central challenges facing industrialised countries as they enter the 21st century (Pellegrino, 2001).

2.5 Modes of Migration

Essentially, migration can be divided into two major categories: permanent and temporary migration. Adamson (2006) defines permanent migration as: relocating to another country with the intention of settling permanently and temporary migration as people who are planning to return to their own nations, for example guest workers, seasonal labourers and students. It seems as if contemporary migration tends to move from the less developed to the more competitive places in the world's knowledge-based economy (Meyer, Kaplan & Charum, 2001). With knowledge-based economies stealing the attention of workers, migration is no longer restricted to countries of comparatively low development or to those with specific socio-political problems, although it certainly is true that these will remain influencing factors (Meyer *et al.*, 2001).

Mahroum (2000) categorises skilled professionals who migrate into five groups:

2.5.1 Accidental Tourists

Often the result of intra-corporate transfers based upon a new merger, internationalisation or expansion of activities overseas, migration of this nature is mostly unplanned, hence the appellation "accidental tourist". This group comprises mainly of managers and executives. They are largely affected by corporate policies and although their migration is the result of intra-corporate transfers, it may turn into long-term residency at some point.

2.5.2 Economy-Class Passengers

Economic considerations like better offers; governments and firms, form the

cornerstone of the push-and-pull factors that motivate this group, and they are therefore largely affected by policies of immigration, industry and labour . Even though their decisions are based on the supply-and-demand mechanisms of the labour market, individuals in this group tend to make their decisions in accordance to what is perceived as most rewarding (Mahroum, 2000:26; Crush & Williams, n.d.).

2.5.3 Pilgrims

Pilgrims are predominantly scientists and academics for whom international networks with other scientists are a normal part of their professional life - an ancient norm (Mahroum, 2000:26). Physical mobility of scientists is a necessity due to the tacit nature of the content and face-to-face contact for knowledge transfer (Mahroum, 2000:26; Ackers, 2005). Where this strong 'expectation of mobility' exists and where it is a direct contributor towards a successful career, it is difficult to speak of migration in the traditional sense; rather, one should think of it in terms of a continuum of choices that may shift over time and space (King in Ackers, 2005).

2.5.4 Explorers

Motivated by a variety of policies, albeit mainly governmental (visa, taxation, protection and the like) and credit facilities, explorers are business-oriented entrepreneurs and traders who enter with capital and ideas, aspiring to set up certain business ventures (Mahroum, 2000:27; Crush & Williams, n.d.).

2.5.5 Passengers

A significant component of overseas travel stem not from corporate assignment but from self-initiated mobility for personal reasons. This group includes students, tourists, permanent migrants and some who travel purely for the cultural experience (Inkson & Myers, 2003). They can be called passengers, and are comprised of the group of people who are heading abroad to certain destinations, but the motives or ultimate destinations are more often than not unknown (Mahroum, 2000:28). Their pursuit can be described as a free-wheeling, improvisational, learn-as-you-go experience (Inkson & Myers, 2003). This 'backpacker culture' involves increasingly larger numbers of young people, mainly from developed countries, who have a desire to 'see the world', wanting to satisfy their curiosity, willing to travel light and searching

for whatever employment they can find (Inkson & Myers, 2003). They are incidentally the main source of workforce supply to the local labour market and to the local and global knowledge pool (Mahroum, 2000:28).

Overseas travel in pursuit of personal development is a common and growing activity among young people (Inkson & Myers, 2003). As young adults approach graduation, the highly educated need to make important decisions in terms of employment, possible careers, marriage and family. In the 21st century, it is also true that increasingly students around the world must also decide *where* they want to pursue these goals (Mattes & Mniki, 2007). They are a group of sought-after migrants in countries such as the United States who are, for example, a world leader in issuing student visas (Adamson, 2006). Other states are quick to follow, with Universities in Great Britain turning to international students as a source of revenue to halt their financial crisis, and in 2005 Britain was host to approximately 50 000 students from China alone (Adamson, 2006).

Having this overseas experience is viewed by many as a rite of passage, a symbol of adulthood, a social norm, a source of pride, an experience that serves as conversational currency among those who partook in it and a bonding mechanism (Inkson & Myers, 2003).

In this study the focus is mainly on a combination of accidental tourists and economy class passengers. Expatriates who are approached by their companies for international assignments mainly fall into the category of accidental tourists. They have likely never considered living overseas until they were approached by the company. The second group of expatriates can be defined as economy class passengers. They responded to an advertisement to work in a foreign country. Their decision to become an expatriate is largely based on the promise of earning more money and cultural enrichment; career advancement and travel are therefore secondary factors. Economy class passengers often make use of international recruitment agencies and migration networks to find international employment.

2.6 Migration Networks

There is growing consensus among immigration researchers that a network of friends and relatives already in a migration destination serve as anchor communities for

newcomers (Boneva & Frieze, 2001). These migration networks can potentially be more powerful than policies of states (Castles, 1998). Once a migration network has started, it is virtually impossible for a democratic developed nation that has respect for human rights and international law to stop it (Massey, 1998 in Olesen, 2002).

Migration networks reflect a connected way of thinking that allows newcomers to tap into an embedded knowledge base, large socio-professional networks as well as the human, material and cognitive resources associated with those who went before (Meyer *et al.*, 2001).

The reason for the emergence of migration networks and their growing recognition as strategic instruments are linked to the convergence of demographics, communication and policy (Meyer *et al.*, 2001). Firstly, the higher number of expatriates from the same countries over the previous decades (even if their numbers are still small in comparison with the corresponding population), implies higher densities that are naturally more conducive for collective endeavours and frequent interaction (Meyer *et al.*, 2001). Secondly, the vast advances made in communication facilities provide a permanent medium for online exchanges, making worldwide networks a reality for most (Meyer *et al.*, 2001). Lastly, the growing importance of knowledge, specifically scientific and technological, as a principal factor of development, increases the demand for a skilled workforce in developed countries (Meyer *et al.*, 2001).

History has proved that migration that started with one type of movement often continued in another form through established migration networks; for example, economic migration may evolve into migration aimed at family reunification (Crush & Williams, n.d.; Martin, 2002).

2.7 The King Never Migrates

The international migration scene may look very different for skilled and unskilled workers. Skilled workers are sought after migrants, whereas low-skilled or unskilled workers are often reduced to illegal status (Emmerij 2004). In order to understand international migration patterns, it is as important to ask why many do not move as it is to investigate why some do. The significance of this question is lodged in the fact that when skilled people leave a country, the natural focus is on what attracted them

to the destination country. The problem arises when the majority's reasons for staying are ignored, and this may give a very distorted picture of both the magnitude of the so-called brain drain and the causes thereof (Hall, 2005).

Migration tends to be a selective process, focusing on the voluntary rather than forced aspect, and favouring people in a certain economic band who possess shared personality characteristics.

2.7.1 Selectivity of Migration

Understanding the selectivity of migration is important, because characteristics of migrants, their households and communities of origin can shape their success in destination countries as well as the impact that their decision can have at home. Migration decisions tend to take place within larger social units, influenced by access to markets, current and expected wages, likelihood of obtaining a job once emigrated and perceived cost of migration, to name but a few. The human capital theory of migration asserts that the type of individual selected into migration are the ones for whom, in due course, the overall cost of migration is lower than the higher income associated with migration (World Bank, 2006)

However, it is not only the individual who is selective regarding migration. Countries such as Australia, New Zealand, Canada and the United Kingdom have all recently adopted a point system. Their new immigration policies shifted from a traditional 'source-country preference' towards an official selection system that privilege skilled workers (World Bank, 2006).

2.7.2 Migration Band

Epstein, Hillman and Ursprung (1999) proposed a model where people make emigration decisions based on their distance from the king (government). They argue that people use time and resources to place themselves in a position of favour with the king. All people are not equally productive, therefore in counting the opportunity cost in time and resources for ingratiating activities, it is important to establish who has the greatest incentive to emigrate. The answer lies in the outcome of the domestic contest for privilege: those furthest from the king are the least privileged, and may end up with a stronger motivation to emigrate. In applying the Tullock contest-success function, it is the least productive who have lower opportunity cost of

spending time to find favour with the king, and the most productive will consequently end up further from the king. In this case the most productive would emigrate (if they can) resulting in a 'brain drain', and the king loses his best tax base. However, should the least productive end up further from the king, and they choose to emigrate, recipient countries may find themselves host to unskilled and perhaps illegally present foreign labour (Epstein, Hillman & Ursprung, 1999).

It is also true that not all people in economically disadvantaged countries want to emigrate to countries with better prospects; in fact, research shows that those who desire to emigrate are not necessarily among the poorest in their home country (Boneva & Frieze, 2001). A World Bank study revealed that households of international migrants actually had above average wealth, whereas households of internal migrants had below average wealth (World Bank, 2006)

Olesen (2002) introduces what he refers to as a migration band for countries who have large emigration populations: below the band people are too poor to move and above the band they are rich enough not to desperately need to move, except of course for the small percentage of people who become migrants regardless. The poorest countries (US\$ 0-1,500/capita in PPP terms¹), see very little migration movement if any, and when it does exist it is mostly refugees, for example many of the African countries, like Ethiopia, Angola, the DRC to name but a few. Middle-income countries (US\$1,500-8,000/capita in PPP terms) tend to provide the bulk of migrants, and they subsequently form the migration band. Countries like South Africa, India and China fall within this category. Richer countries like America, Canada and the United Kingdom (>US\$8,000/capita in PPP terms), on the other hand, see fewer movements.

¹ /capita is a Latin phrase meaning per head. It is usually used in the field of statistics to indicate the average per person for any given concern and in this case income. Using a PPP (purchasing Power Parity) basis is appropriate when comparing generalised differences in living standards in the whole between nations because PPP takes into account the relative cost of living and the inflation rates of the countries, rather than using only exchange rates which may distort the real differences in income (Wikipedia, 2008). In this instance it refers to the amount of money a person has per year to purchase whatever that person may need in order to survive.

Boneva and Frieze (2001) propose that while it may be true that aspects such as unfavourable economies in the country of origin, emigration and immigration policies, network support in the receiving country and other environmental factors all create the conditions for wanting to emigrate, the desire to do so is imbedded in the personality of the migrant.

2.8 Why Migration Takes Place

There have been many attempts by researchers to explain the growth in international migration using an extensive variety of theoretical perspectives and explanatory frameworks. These explanations are either pitched at a macro or micro-level. At the macro-level the focus is on structural changes that accelerate migration, and at the micro-level they focus on individual and household decision-making processes, including the reasons why decision-makers respond in different ways to the same push-and-pull factors. In the end, the causes of migration are multiple, variable, scale-dependent and even country-specific, so that not one explanation will suit all situations (Crush & Frayne, 2007). Following a deductive approach by trying to apply conclusions made on a macro-level to individuals, or an inductive approach where the researcher tries to apply micro-level decisions on a macro-environment, will ultimately lead to a myriad of local exceptions. Although it may be useful in the same way that stereotypes are useful for understanding different cultural groups and to draw broad conclusions, one would more often than not fail if one tried to make a specific stereotype applicable to a particular person. The opposite is also true; one cannot form broad stereotypes based on the opinions of a single individual. It is also important to note that stereotypes of any nature remain perceptions, and can only be deemed as true after rigorous empirical research.

Having said that, it is helpful to attempt to categorise the various reasons why people migrate in order to arrive at a measure of understanding of the dynamics underpinning migration movements and decision-making.

Economists are mainly responsible for the models and frameworks of international migration that we currently have, and they tend to ignore the social dimension (Joly, 2000). Four broad models for explaining migration are the supply and demand of labour, dual market theory, world system theory and the new economics of migration theory.

2.8.1 Supply and Demand of Labour

One explanation for international migration is the supply and demand of labour which is linked to wage differentials, with the hypothesis being that migration flows would be from labour-rich countries to labour-scarce countries. Following this reasoning, one might conclude that migration is beneficial both to sending and receiving countries and even to the migrants themselves, since labour-rich countries get rid of surplus labour, labour-poor countries receive additional workers and the migrant can improve his living conditions (Joly, 2000). However, it is important to note that past attempts at manpower planning showed that neither supply nor demand for labour remain constant, nor do they change in precise or expected ways. The unpredictability of the demand and supply of labour makes it increasingly difficult for government intervention in the nation economy or labour market (Crush & Williams, n.d.). This theory further fails to take situations into account where migration continues into capital-rich countries even when there is a high rate of unemployment (Joly, 2000).

2.8.2 Dual Market Theory

Human capital impel competitiveness and encourage foreign investment, making people more mobile than ever before, with skilled professionals taking centre stage (Birkinshaw, 2005; Appleyard, 2001). The result is a dual market world economy, where pull factors in the receiving country are the primary driving force. These pull factors allow for remuneration that coincide with hierarchies of expected prestige and status where status is a valued reward. Receiving countries tend to be more capital intensive, and they require low-skilled, low-paid and low-status workers, and migrants are happy to fulfil these positions because their perceived status is determined within their sending society (Joly, 2000). Push factors in the sending country may add to the attractiveness of pull factors in the receiving country. However, beyond the obvious comparative advantage that many receiving countries offer in terms of salaries and possibilities, it must be underscored that receiving countries have constituted a centre of gravity and a powerful magnet for personal development (Pellegrino, 2001:121).

2.8.3 World System Theory

The world system theory ascribes international migration to the infiltration of capitalist economies into non-capitalist societies, with a resulting consequence of populations becoming more prone to migrate (Joly, 2000). With the widening technological gap between industrialised and developing countries, the opening up of markets in industrial goods and services has led to increased competition from industrialised economies. Developing economies find it hard to compete with industrial countries, and in those sectors where they are able to compete, the 'international market' remained largely closed (Lehmann, 2001).

2.8.4 New Economics of Migration Theory

None of these economic models take the social factors involved in migration decision-making into consideration. The new economics of migration theory states that individual motivation does not help much towards analysing the effect of migration, and suggests that one should rather look at a collective decision-making unit. The theory points out that migration decisions are often made by larger units than the individual. In circumstance where the decision-making process takes place on household or extended family level, the goal is not merely to maximise total income, but also as an insurance against a variety of risks by diversifying sources of income (Joly, 2000). This is especially true for migration in Africa, where it very much remains a 'family matter' (Adepoju, 2000:384). Africa affirms the harsh reality of migration, for a large majority of Africans migration is strictly a survival strategy (Crush & Williams, 2004). It further reminds us that the benefits of globalisation and its flows of people, capital, and ideas are unequally dispersed (Uehling, 2004).

2.9 Migration and Education Attainment

Migration is a phenomenon that has been widely investigated by policy-makers and academics and is mostly described as a "concern" for nations. In 2002 the United Nations reported that three per cent of the world's population, or 175 million persons, currently live in countries other than the country they were born in (United Nations 2002). Economies are becoming more reliant on knowledge workers, and the loss of best-trained workers places tremendous pressure on national productivity and output (Ouaked, 2002:155). In an economy driven by knowledge, it is easy to see why receiving countries view the arrival of more knowledge workers as a gain, but would

feel less enthusiastic about the arrival of the unskilled. On the other hand, most sending countries would not perceive it as a great loss when their unskilled labour force emigrated, but again would not view it positively when their skilled or educated labour force left. Therefore, developing countries view the migration of their skilled workforce as a threat to their own economies (Tansel & Gungor, 2002).

The brain drain mostly refers to the loss of skilled or educated people. In order to understand the pressure that sending countries feel in terms of the brain drain, one has to calculate the percentage of emigrants as a proportion of the total educated labour market (World Bank, 2006). For example, the strain felt in India due to 1 037 million skilled emigrants (four per cent of the educated labour force), is far less than the strain a country like Grenada feels, where 16 000 skilled people emigrated, representing 85 per cent of their educated labour force (World Bank, 2006).

A study by the World Bank (2006) reports that the number of educated people born in one country and living in another country increased from 42 million in 1990 to 59 million in 2000. During this period the world potential labour force increased from two point six billion to three point two billion. The labour force with tertiary education increased by one point eight per cent, and the share of low-skilled workers decreased by two point five per cent. The average immigration rate increased from five point two to five point four per cent for skilled, and from one point four to one point eight per cent for medium skilled, with a small decrease from one point two to one point one for low-skilled workers.

Table one indicates that 27.3% of the workforce in OECD (Organisation for Economic Cooperation and Development, refer to glossary for members) countries have tertiary education, whereas 30.2 per cent of immigrants have tertiary education. This suggest a brain gain for OECD countries. The picture looks much darker for non-OECD countries, where a mere six per cent have tertiary education, but 38.6 per cent out of the six per cent decided to emigrate, suggesting a brain drain. The statistics clearly indicates that there is a tendency among skilled people world wide to emigrate, and migration statistics in OECD countries suggests that receiving countries are becoming more selective with regards to who they allow into the country.

	1990		2000	
Total Stock of Migrants in OECD countries	41.845	% of stock (*)	59.022	% of stock (*)
Information about country of origin	41.845	100.00%	59.022	100.00%
including information about country of birth	36.812	88.00%	52.145	88.30%
including information about citizenship	5.033	12.00%	6.878	11.70%
Information about educational attainment	38.169	91.20%	57.9	98.10%

Table 1: International Migration by Education Attainment

(World Bank, 2006:164)

including "education not described"	1.576	3.80%	1.287	2.20%
including Labour Force Survey data	0.283	0.70%	1.181	2.00%
Migrants with tertiary education	12.462	29.80%	20.103	34.60%
including skilled migrants to the US (*)	6.203	4.80%	10.354	50.70%
including skilled migrants to Canada (*)	1.879	15.10%	2.742	13.40%
including skilled migrants to Australia (*)	1.11	8.90%	1.54	7.50%
including skilled migrants to the UK (*)	0.57	4.60%	1.257	6.20%
Including skilled migrants to Germany (*)	0.556	4.50%	0.996	4.90%
including skilled migrants to France (*)	0.3	2.40%	0.615	3.00%
Migrants with secondary education	10.579	25.30%	17.107	29.00%
Migrants with less than secondary education	18.804	44.90%	21.512	35.40%
World total labour force (Independent territories only)	2568.229	% of labour force	3187.233	% of labour force
World labour force with tertiary education	234.692	9.10%	360.614	11.30%
World labour force with secondary education	755.104	29.40%	945.844	29.70%
World labour force with less than secondary education	1578.433	61.50%	1880.775	59.00%
World average emigration rate - tertiary education	5.00%	-	5.40%	-
World average emigration rate - secondary education	1.20%	-	1.80%	-
World average emigration rate - less than secondary education	1.20%	-	1.10%	-
OECD total labour force	657.718	% of all groups	750.089	% of all groups
OECD labour force with tertiary education	144.05	21.90%	207.352	27.60%
OECD emigrants with tertiary education	6.094	26.70%	8.533	30.20%
OECD average emigration rate - tertiary education	4.10%	-	4.00%	-
Non-OECD total labour force	1910.511	% of all groups	2437.144	% of all groups
Non-OECD total labour force with tertiary education	90.642	4.70%	153.262	6.30%
Non-OECD emigrants with tertiary education	6.367	33.50%	11.87	38.60%
Non-OECD average emigration rate - tertiary education	6.60%	-	7.20%	-

Note: (*) percentage of the stock of skilled migrants only, (-) no information available

Looking at migration trends at a global level will conceal differences across countries and within various country groups. For instance, the number of skilled emigrants from

OECD countries increased less than the number of skilled residents. The picture for non-OECD countries looks slightly different where the number of skilled emigrants has increased from six point six to six point seven per cent (World Bank, 2006). It is therefore relevant to look at the statistics as they pertain to country groups.

Table 2: International Migration by Education – Data by Country Group

(World Bank, 2006:170)

	Share in OECD stock (*)		Rates of emigration		Share of skilled workers	
	Total	Skilled	Total	Skilled	Among residents	Among Migrants
By country size						
Large countries (pop > 25 mil)	60.60%	63.90%	1.30%	4.10%	11.30%	36.40%
Upper-middle (25>pop>10)	15.80%	15.20%	3.10%	8.80%	11.00%	33.20%
Lower-middle (10>pop>2.5)	16.40%	15.70%	5.80%	13.50%	13.00%	33.10%
Small countries (pop<2.5)	3.70%	3.70%	10.30%	27.50%	10.50%	34.70%
By income group						
High-income countries	30.40%	33.70%	2.80%	3.50%	30.70%	38.30%
Upper-middle income countries	24.30%	17.70%	4.20%	7.90%	13.00%	25.20%
Lower-middle income countries	26.60%	27.20%	3.20%	7.60%	14.20%	35.40%
Low-income countries	15.10%	19.80%	0.50%	6.10%	3.50%	45.10%
By group of particular interest						
Middle East & Northern Africa	6.50%	6.00%	2.80%	8.90%	9.40%	32.00%
Economies in transition	12.30%	10.80%	2.70%	4.80%	17.10%	30.30%
European Union (EU-15)	23.00%	21.60%	4.80%	8.10%	18.60%	32.50%
Sub-Saharan Africa	3.80%	4.70%	0.90%	12.90%	2.80%	42.60%
Islamic countries	14.40%	11.90%	1.60%	7.10%	5.90%	28.70%
Arab countries	5.50%	4.20%	2.60%	7.80%	8.50%	26.40%
UN least developed countries	4.20%	4.20%	1.00%	13.20%	2.30%	34.00%
UN landlocked developing countries	2.10%	2.30%	1.00%	5.00%	6.80%	37.10%
UN Small island developing states	6.80%	7.40%	13.80%	42.40%	8.20%	37.60%
By Region						
America	26.30%	22.60%	3.30%	3.30%	29.60%	29.70%
North America	2.80%	4.60%	0.80%	0.90%	51.30%	57.90%
Caribbean	5.10%	5.70%	15.30%	42.80%	9.30%	38.60%
Central America	13.70%	6.60%	11.90%	16.90%	11.10%	16.60%
South America	4.70%	5.60%	1.60%	5.10%	12.30%	41.20%
Europe	35.70%	32.80%	4.10%	7.00%	17.90%	31.70%
Eastern Europe	7.90%	7.80%	2.20%	4.30%	17.40%	34.20%
Northern Europe	7.90%	9.90%	6.80%	13.70%	19.90%	43.20%
Southern Europe	12.40%	6.50%	6.60%	10.70%	10.80%	18.20%
Western Europe	7.50%	8.60%	3.30%	5.40%	23.40%	39.30%
Africa	7.60%	6.80%	1.50%	10.40%	4.00%	30.90%
Eastern Africa	1.40%	1.70%	1.00%	18.60%	1.80%	40.80%
Central Africa	0.50%	0.50%	1.00%	16.10%	1.60%	30.90%
Northern Africa	3.90%	2.20%	2.90%	7.30%	7.50%	19.60%
Southern Africa	0.50%	0.80%	1.00%	6.80%	8.70%	62.10%
Western Africa	1.30%	1.60%	1.00%	14.80%	2.40%	42.00%
Asia	25.50%	34.50%	0.80%	5.50%	6.30%	46.80%
Eastern Asia	7.10%	11.30%	0.50%	3.90%	6.30%	55.50%
South-Central Asia	6.00%	9.20%	0.50%	5.30%	5.00%	52.50%
South-Eastern Asia	7.00%	10.50%	1.60%	9.80%	7.90%	51.40%
Western Asia	5.30%	3.50%	3.50%	6.90%	11.40%	22.90%
Oceania	1.40%	1.80%	4.30%	6.80%	27.80%	45.00%
Australia & New Zealand	1.00%	1.40%	3.70%	5.40%	32.70%	49.20%
Melanesia	0.20%	0.30%	4.50%	44.00%	2.70%	45.00%

Micronesia	0.00%	0.00%	7.20%	32.30%	7.10%	43.60%
Polynesia	0.20%	0.10%	48.70%	75.20%	7.10%	22.70%

Note: (*) Contrary to country groups, the total OECD stock includes the unknowns and the dependent territories, the sum of regional shares lower than 100 per cent.

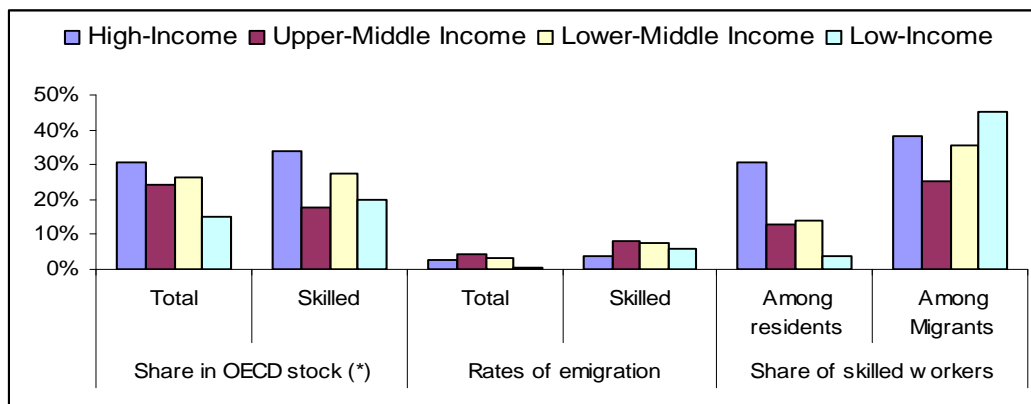
Table Two provides more detail on migration and education by breaking these up into country groups². Descriptions of each country group is provided in the Appendix .

The share of immigration stock (both total and skilled), the average emigration rate, and the share of skilled workers among emigrants and residents in OECD countries were calculated for these groups. The study found a decreasing relationship between emigration rates and country population sizes, with lower-middle-size countries' share exceeding that of upper-middle-size countries. The average migration rate for small countries is seven times higher than that of large countries. This rate cannot simply be ascribed to the education structure or a stronger selection in migration flows, or that smaller countries merely tend to be more receptive to migration (World Bank, 2006).

Figure 1: Country Data per Income Group

(World Bank, 2006:170)

² Countries are grouped by size, based on their total population (large countries > 25 million, upper-middle countries 10 – 25 million, lower-middle countries 2.5 – 10 million and small countries < 2.5 million). They are classified by income groups, with categories for high-income, upper-middle income, lower-middle income and lower income. They are categorised by geographical areas: American areas (North America, the Caribbean, Central America and South America), European areas (Northern Europe, Western Europe, Eastern Europe and Southern Europe), five African areas (Northern Africa, Central Africa, Western Africa, Eastern Africa and Southern Africa), Asian areas (Western Asia, South-Central Asia, South-Eastern Asia and Eastern Asia), and four areas in Oceania (Australia, New Zealand, Melanesia, Micronesia and Polynesia). Some classifications based on political interest are also provided: Middle East and North Africa countries (MENA), economies in transition, the EU-15 members, Sub-Saharan African countries, Islamic countries (members of the Organisation of Islamic Countries, OIC), Arab countries (members of the Arab League), the least developed countries, landlocked developing countries, and small island developing countries. More detailed descriptions are provided in the Appendix (World Bank, 2006).

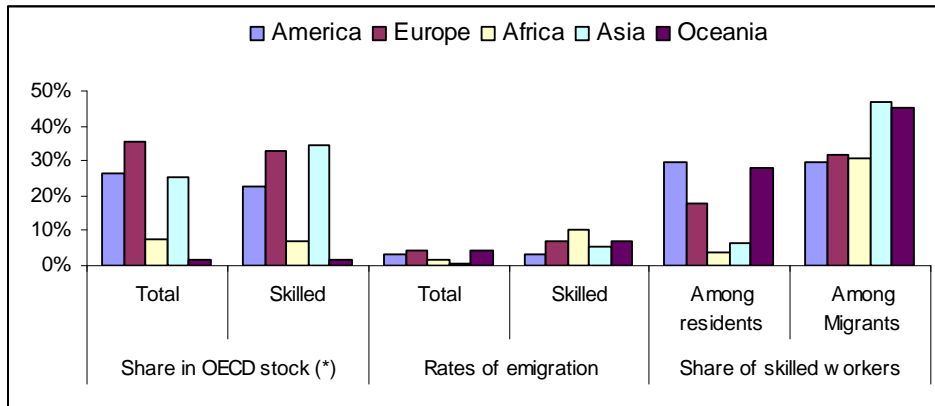


Note: (*) Contrary to country groups, the total OECD stock includes the unknowns and the dependent territories

The data obtained for migration per income group in Figure One is consistent with Olesen's (2002) study of migration bands as discussed in paragraph 7.2 above. High-income countries seem to produce less incentive to emigrate, whereas low-income countries are often unable to do so. This means that lower-middle to upper-middle income countries contribute to the highest number of migrants. Secondly, there is a higher percentage of skilled workers among migrants than residents. Low income countries are hardest hit, with only three and a half per cent skilled workers among their residents, and 45.10 per cent of emigrants are skilled. Therefore the pressure of skilled migration is most acutely felt in countries where there are large numbers of emigrants with significantly smaller numbers of immigrants. This is also true when the number of skilled emigrants exceed the number of skilled immigrants, resulting in a net loss for the country. Studies have found that most skilled migrants leave their country of birth in the pursuit of a better life or better working conditions. This suggests that skilled workers in high-income countries are more likely to migrate to another high-income country, with a contribution of 33.7 per cent of the migration stock in OECD countries, and a total migration rate of only two per cent. On the other end of the scale, low-income countries have a total migration rate of point five per cent, extremely small in comparison with other country groups, confirming that people in low-income countries often do not have the means to migrate.

Figure 2: Country Data by Geographic Regions

(World Bank, 2006:170)

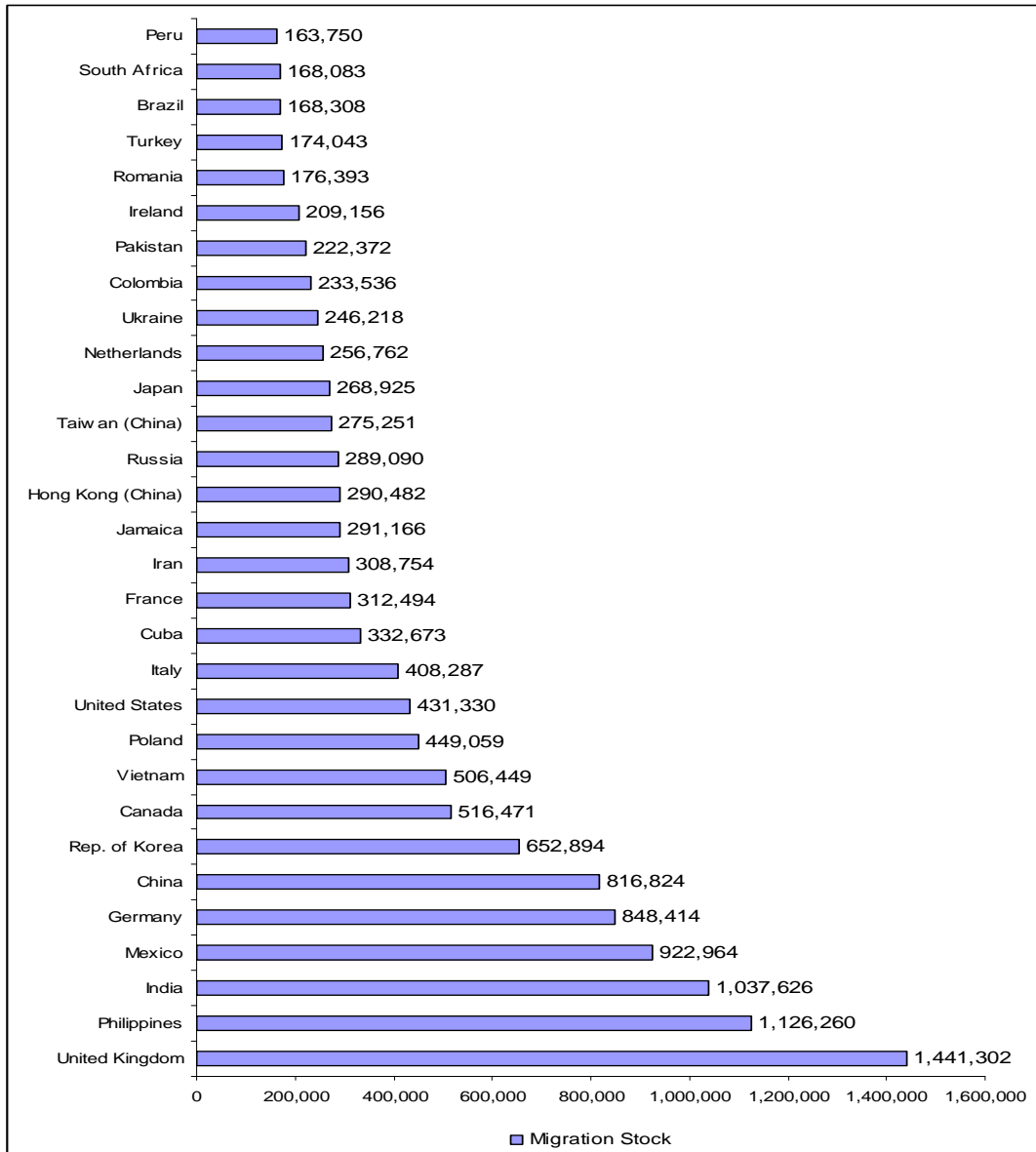


Note: (*) Contrary to country groups, the total OECD stock includes the unknowns and the dependent territories

Figure Two indicates that America, Europe and Asia contribute to the largest number of migrants in OECD countries, as well as the highest number of skilled migrants. In America the number of skilled residents and the number of skilled migrants are more or less the same, with a comparatively small migration rate. Africa and Oceania form the smallest part of the OECD migration stock. Oceania has a relatively high rate of migration for both categories, however the portion of skilled migrants is significantly higher when compared with skilled workers among residents. Africa has a very low total migration rate, but the migration rate among skilled workers is the highest in comparison with other regions, yet Africa's contribution to the OECD migration stock is comparatively low. This suggests that only the educated African have the means to migrate, but that they possibly migrate to other African countries, instead of OECD countries. Asia, on the other hand, also has a low total migration rate, with a significantly higher skilled migration rate, but they are the highest contributor to the OECD skilled migration stock.



Figure 3: The 30 Countries with the Highest Number of Skilled Emigrants
(World Bank, 2006:175)



When looking at emigration stock numbers in Figure Three, countries with the largest populations tend to be higher contributors to migration stock, such as the UK, India and China. South Africa is positioned in 29th place with 168 083 skilled emigrants. This however, does not necessarily translate into an overall net loss for these countries, as they also seem to be on the receiving end of migration. They further tend to have a larger educated workforce base, which means that the percentage loss of skilled people places less stress on the overall economy, and does not automatically constitute a debilitating brain drain.

Figure 4: Top 30 Countries with the Highest Emigration Rates

(World Bank, 2006:175-176)

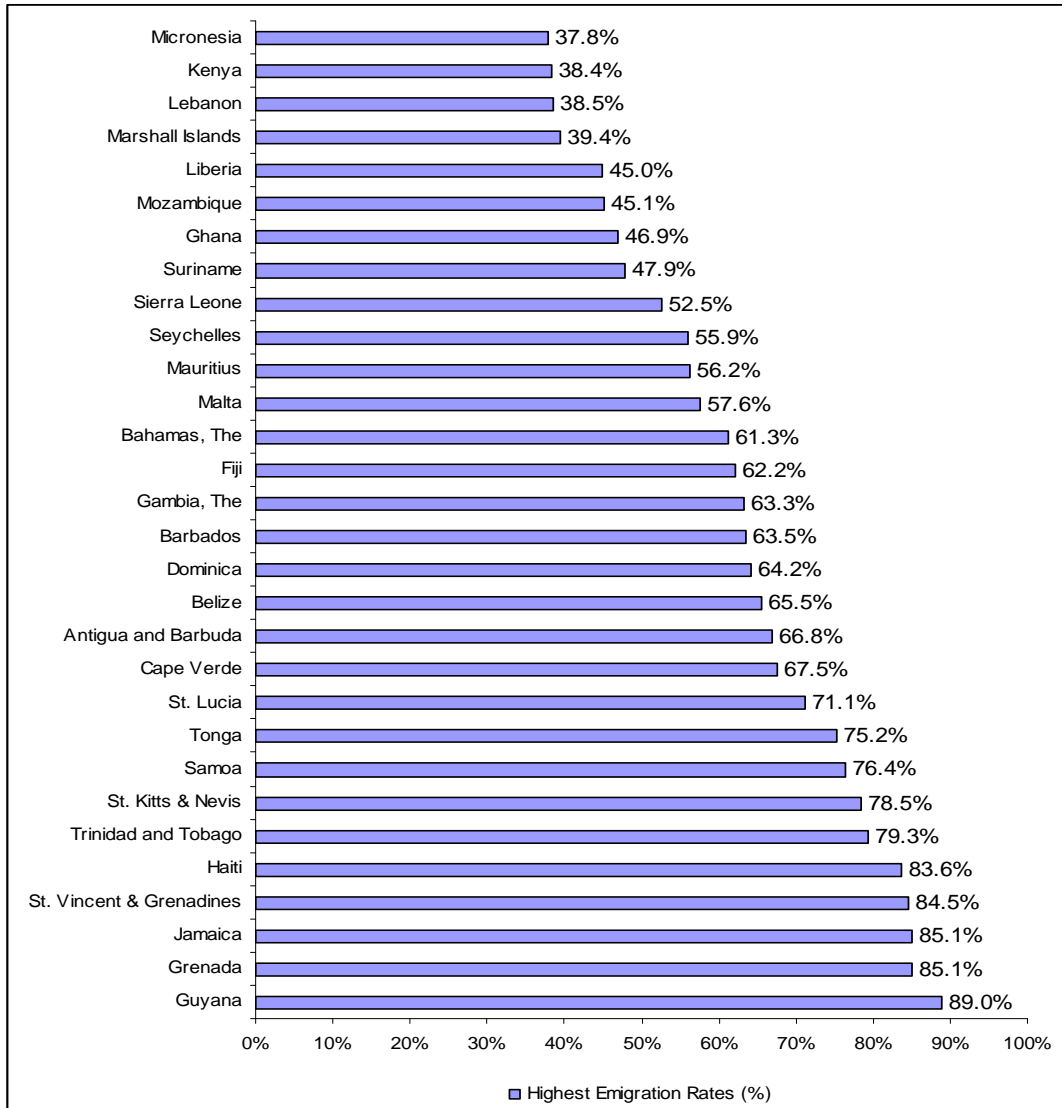


Figure Four suggests that small island countries have by far the largest emigration rates, and this is mainly due to two reasons: firstly the population size is comparatively small, and secondly there are fewer opportunities for skilled professionals (World Bank, 2006). The impact on the sending countries can be debilitating, taking into account the relatively small workforce and even smaller educated workforce: in these countries, any rate of emigration would put a strain on the overall economy. However, although the emigration rate may be enormous in view of the population size of the sending country, the impact on the rest of the world

2.10 Reasons Why Skilled People Migrate

in terms of numbers is small.

New technologies in industrialised countries have revolutionised production processes, products and markets, and have changed sector structures. These changes have led to massive job losses in the manufacturing and servicing sector, whereas the science-based industries have shown massive growth. It is easy to see how this situation has led to increasingly competitive demands for professional, managerial and technical skills (Crush & Williams, n.d.). These same changes have simultaneously led to a growing number of skilled and highly sought after professionals to accept employment in foreign countries. When asked, this group presents numerous reasons for their migration decisions but these can loosely be classified into three broad categories: personal or family reasons, work-related reasons and external factors such as conditions in their home country versus conditions in the receiving country.

2.10.1 Personal Reasons

There are multiple personal reasons why people choose to migrate. As mentioned earlier, in many cases the decision is a joined one, taking the significant people in the migrant's life into account. Some of the reasons for skilled migration that are most often mentioned are higher wages (Belaz, Williams & Kollar, 2004; Hall, 2005; Kingma, 2001; Pozzolo, 1999); the prospects of a better life or better life-chances (Ackers, 2005; Hall, 2005; Iredale, 1999); a new start in life (Akokpari, 1998; Hall, 2005); a better social environment (Tansel & Gungor, 2002); personal development (Kingma, 2001; Tansel & Gungor, 2002); personal safety (Kingma, 2001; Olesen, 2002) and, in many cases, it is purely a survival strategy (Akokpari, 1998; Nyberg-Sorenson, van Hear & Engberg-Pedersen, 2002; Taylor, 2005).

2.10.2 Work Related Reasons

With the rise of globalisation, people can progressively decide where in the world they want to pursue their careers. It becomes possible for skilled professionals to look for the most interesting work, a new experience (Hall, 2005), or even a new challenge (Hall, 2005; Iredale, 1999; Morano-Foadi, 2005). Skilled people can follow new technology (Crush & William, n.d.; Tansel & Gungor, 2002); an international experience (Ackers, 2005) or look for the most conducive work environment (Ackers, 2005; Hall, 2005; Iredale, 1999; Kingma, 2001; Tansel & Gungor, 2002). Some professionals are internally transferred by their companies (Hunt, 2004) or for some it is an integral part of their career progression (Ackers, 2005; Belaz, William & Kollar,

2004; Birkinshaw, 2005; Iredale, 1999; Kingma, 2001; Tansel & Gungor, 2002). Lastly, many accept international careers in the pursuit of an advantageous professional environment (Hall, 2005; Tansel & Gungor, 2002), a more rewarding job (Kingma, 2001) or simply better job opportunities (Akokpari, 1998; Iredale, 1999; Kingma 2001; Narayan & Smyth, 2003; Tansel and Gungor, 2002; Wong, 2004).

2.10.3 External Factors

Studies have found that skilled people are very receptive to migration when they believe that the human rights conditions or governance situation in their home country are unacceptable (Akokpari, 1998; Kingma, 2001; Narayan & Smyth, 2003; Olesen, 2002; Wong, 2004). Olesen (2002) explains that migration becomes an option when honest civil servants refuse to be corrupted, a lack of freedom of speech and where promotions are based on unprofessional criteria. Fortunately, history has proved that when these circumstances improve, return migrations start, irrespective of the economic situation in the home country. Some examples of this are Spain after the death of Franco in 1975; Armenia after 1990; the collapse of the Soviet Union; Eritrea after independence in 1991; Chile after the departure of General Pinochet in 1991 and Afghanistan after the departure of the Taliban. More external contributors to migration are the home and host country's economy (Akokpari, 1998; Kingma, 2001; Wong, 2004); changing demographics (Akokpari, 1998) and a continued expectation of migration in certain jobs (Morano-Foadi, 2005).

Decisions regarding migration are therefore mostly based on personal reasons where some ideal of a better life or a higher return on investment are the core motivation. Unfortunately for many migrants the grass is not always greener on the other side of the fence, and the harsh reality of some migrants' inability to fully incorporate themselves in the host country is seldom taken into account. For many their migration story does not have the happy ending they anticipated, while others struggle for years before they reach their dreams.

2.11 Circumstances of Migrants in The Host Country

2.11.1 Stages of Incorporation

The degree of migrant incorporation into the home country is largely dependent on two things: 1) the reason for migration and 2) the baggage immigrants carry in terms of culture, religion, social networks and links to their home country (Joly, 2000).

There is continued interaction between the community in the country of origin and the community in country of settlement. Faist (in Joly, 2000) identifies three stages: during the first stage the link with the sending country is very strong and mostly maintained through remittances being sent home; stage two is characterised by the birth and growth of ethnic communities with their own institutions, religious organisations, pressure groups, political organs, ethnic press and businesses, whereas stage three sees trans-national production, distribution and sales (Joly, 2000).

Immigrant workforces are bipolar, clustering at the upper and lower levels of the labour market (Castles & Miller in Crush & Williams, n.d.). Therefore they constitute two types of immigrant markets: the first is for skilled workers and is mainly driven by international recruitment and businesses. This type of migration is normally legal and supported by the community and the government, because of the perceived benefits for the host country and the relatively small drain on society. The second type of immigrant market is that of low-skilled workers. The demand for low-skilled workers is volatile and seasonal. These positions are therefore typically filled by illegal immigrants, and their movements are rarely regulated by law. The main advantage for employers is the vulnerable situation in which these immigrants find themselves, and they are often exploited (Crush & Williams, n.d.). However, after a period of time neglected neighbourhoods who have been invigorated by migrant communities strive to participate fully in the majority society. These communities create demands, and claim the right to a different identity based on equality (Joly, 2000).

Integration of immigrants into the economy and society is determined by the extent to which they are given rights and entitlement, and granted entrée to public resource. There are a number of elements that determine integration political consensus among the various parties in the sending and receiving countries, in order to minimise a broad spectrum of fears. Integration may mean a higher degree of involvement in both home and host country economies; however, there needs to be a clear understanding to which degree certain rights and entitlements are to be protected and guaranteed by the host country (Crush & Williams, n.d.; Nyberg-Sorensen *et al.*, 2002).

2.11.2 Conditions in Host Countries

Timur (2000) has identified three types of situations in host countries: in the first

place, there are host countries where immigrants come across a comparatively homogenous society with longstanding institutions where the tendency among migrants is to conform to conventional patterns and cultural life. An example is the United Kingdom. The second type is where newcomers encounter a loosely knit culture, as with the United States. Diversity of origin is taken for granted, with few established institutions, and therefore the culture of the immigrants is set in the context of existing differences. Lastly, as in the examples of Brazil and Argentina, migrants find societies that are mainly rural and colonial with dependence on Europe for their cultural heritage. In these countries with a less organised cultural life and urban centres that are often remote from the rest of the country, it is easy for immigrant communities to become isolated.

2.11.3 Linking Cause and Consequence

It is not uncommon for immigrants to occupy the lower strata of the working class and to experience discrimination in terms of access to housing, education, health and welfare; they may also have inferior status as a direct consequence of migration. During difficult economic times, those stigmatised become an easy scapegoat for political leaders who wish to divert blame and who want to offer convenient and fast solutions. These processes can potentially pose a serious threat to ethnic minorities who often do not have the position, capacity or ability to take action (Joly, 2000).

A second unanticipated dilemma of migration is that a fair share of migrants settle in the host country even when that was not their initial plan nor something envisaged by the policy-makers. After some time family reunification takes place, and in due course the host country is home to second and third generation immigrants, who are very far removed from the initial cause of migration, and who have few links, if any, with the sending country. The predicament here is that this group are no longer immigrants; however, in many circumstances they remain at the lower strata of society with the stigma of immigrants, and unlike their parents, they can't call on home country status identification (Joly, 2000). Where immigrants find it impossible to integrate into the host society, it is almost impossible for them to make the same level of contribution to the economy than they would have, should they have remained home.

2.11.4 Brain Waste

It is not unheard of to hear that immigrants from industrial countries find it hard to use their human capital or skills in post-industrial economies. Sadly, many of those who prior to immigration worked in academic, professional and technical positions, find their experience irrelevant in their new country. Some of these people were highly valued and amongst the elite back home (Menahem & Spiro, 1999). A single trip through immigrant communities in London, Frankfurt or Paris will produce trained professionals doing unskilled labour like doctors driving busses, or engineers sweeping floors (Hansen, 2003)

A study conducted in China found that even with increased human capital (i.e. higher levels of education and English proficiency) Chinese immigrants in Canada have lower employment and self-employment income than the rest of the population (Wang & Lo, 2005). It was, however, found that their level of economic performance increased with their length of stay in Canada. However, it would take a Chinese immigrant at least 20 years to close the gap (Wang & Lo, 2005). On the other hand, Menahem and Spiro (1999) showed that a shared ethnic origin with the dominant groups in the receiving country greatly increased the immigrants' chances of success.

Migrants frequently overestimate the return on investment when they make their migration decisions. Relatively few migrants acquire new technical skills because many receiving countries mainly require low-skilled workers, and they are reluctant to train foreign labour (Crush & Williams, n.d.). Migrants then either accept their circumstances or return to their home countries.

2.11.5 Return Migration

Return migrants comprise an interesting heterogeneous group of failures and successes. This is in keeping with the theory that for some the reality in the host country was worse than anticipated, yet others always intended to return (Hunt, 2004).

Cerase (in Olesen, 2002) identified four categories of reasons for return migration: 1) return of failure – describing migrants who were unable to find jobs necessary for survival and for remittances; 2) return of conservatism – migrants who discovered they could not thrive in a different culture; 3) return of retirement – the fortunate ones who made enough money and were subsequently able to return home and retire; 4)

return of innovation – migrants who were fortunate to acquire new skills or resources, and who were able to take these back home and start a new business or continue their professional careers.

The decision to return home is a complex one, with a new set of circumstances coming into play. Many find the decision progressively more difficult the longer they stay in the host country (Alberts & Hazen, 2005). Skilled people are more likely to return home successfully if they make the move within first five years of immigration (Thomas-Hope, 1999). Unfortunately it is difficult for many sending countries to attract their brightest away from higher salaries, better working conditions, better health care and welfare provisions than they have grown accustomed to (Thomas-Hope, 1999). It is important to understand that the reasons for leaving are different, and subsequently the return incentives should vary as well (Olesen, 2002). Patriotism and a sense of belonging become a less vital part of the decision-making process because many migrants feel they do not fully belong in the host country; however, they simultaneously feel that they do not fit in at home anymore (Alberts & Hazen, 2005).

Factors that would positively influence return are the desire to be near family, to have a rewarding career and the need for friends with whom they have something in common (Alberts & Hazen, 2005).

The return of skilled people may seem like an unquestionable gain for sending countries. Unfortunately, the actual impact of returns is dependent on a combination of factors: the applicability of newly acquired skills and experience, the attitude of the migrant, as well as the current conditions in the country itself (Thomass-Hope, 1999). Studies on return migrants found that they sometimes think “work abroad, leisure at home”. This means that return migrants are often not interested in applying the skills that they have acquired in lower-wage jobs at home (Martin & Straubhaar, 2002). Reintegration of returnees is not always smooth and some have difficulty finding work, with salary expectations that have become too high in relation with locally educated graduates (Omelaniuk, 2005). Where migration does not happen in isolation, the effects are not felt in isolation. The migrant, the host and the sending country all bear the consequences of migration.

2.12 Effect of Migration

In today's knowledge economy, human capital or skill has become a key commodity. Obtaining human skills is crucial to ensure a competitive edge. This is not only true for the new economy, but also for more traditional industries and manufacturing (Meyer *et al.*, 2001). Migration is a key player in this knowledge economy. Irrespective of the forces that shape specific out- or inflows, migration has a few distinct and multifaceted consequences. Those who make up the migration numbers constitute around three per cent of the world's population; however, the process has a disproportionate impact on both the country of origin, the destination country, communities, the migrant and his or her family (Timur, 2000).

The dynamics between gaining or losing due to migration is country-specific, and it may even vary within countries. Whether migration is experienced as positive or negative in a specific country will be determined by a range of social, demographic, economic and political factors. As a rule of thumb, countries with strong economies are less likely than weak or fragile economies to experience emigration of their best skilled people. The irony is that those nations who can least afford emigration are the ones most severely hit by it (Crush & Frayne, 2007).

The effect of migration on welfare and income distribution is dependent on social mobility, and the cost of accumulating human capital for skilled and unskilled workers. In cases where the cost is the same for both groups, migration would not have an effect in either the sending or the receiving country. If it is more expensive for unskilled people and their children to attain new skills, they will experience a welfare loss within the receiving country, while skilled people will experience a welfare gain. Of course, the effects on average utility in both sending and receiving countries is determined by the extent of migration and the initial ratio between skilled and unskilled workers (Pozzolo, 1999). The intricate nature of national labour therefore does not allow for a consistent set of advantages or disadvantages for either sending or receiving foreign workers (Crush & Williams, n.d.)

Crush and Frayne (2007) identified three general perspectives of the effect of migration on development: 1) migration has a positive impact on development; 2) migration has a negative impact on development; and 3) the relationship between migration and development is complex and situation-dependent.

Positive effects of international migration may include opportunities for workers that are not available to them in their own country, it eases the effect of labour surplus in sending countries, it leads to an inflow of remittances and foreign exchange, it assists towards poverty reduction, facilitates skills and technology transfers, leads to investments by diasporas, gives rise to increased trade flows between sending and receiving countries, is a stimulus to investment in domestic education and human capital, and the return of skilled workers increases local human capital, foreign linkages, and international student migration increases local skills base on return (Crush & Frayne, 2007).

Negative effects of international migration may include loss of skilled workers, reduced economic growth and productivity, reduced quality of essential services (i.e. health, education, governance and so forth), lower returns from public investment in education, increased disparities in wealth, loss of fiscal revenue from taxation of workers, dependence on remittances, remittances that diminish over time, social problems stemming from prolonged family separation, increased vulnerability to diseases such as HIV/AIDS, and intolerance of migrants from other countries (Crush & Frayne, 2007).

Migration also has a range of economic consequences that impacts on the employment rate and wages of native workers and immigrants, productivity and the growth rate of the economy, entrepreneurialism and innovation as well as the fiscal balance of government (Kleinman, 2003).

One aspect that most economists agree upon is that when we consider both the sending and receiving countries as part of the same world, the overall effect of migration on the average standard of living is positive. This is because most migrants move from a place where they were less productive to a place where they are more productive, and this enhanced production increases the standard of living of the community as a whole, and that of the migrant (Kleinman, 2003).

The number of migrants has more than doubled since 1970. Sixty per cent of the world's migrants currently reside in the more developed³ regions and 40 per cent in the less developed regions. Most of the world's migrants live in Europe (56 million),

³ Refer to the Appendix to see the United Nation's categorization of developed and developing nations.

Asia (50 million) and Northern America (41 million). Almost one out of every ten people living in the more developed regions is a migrant. In contrast, nearly one of every 70 persons in developing countries is a migrant (IM, 2002).

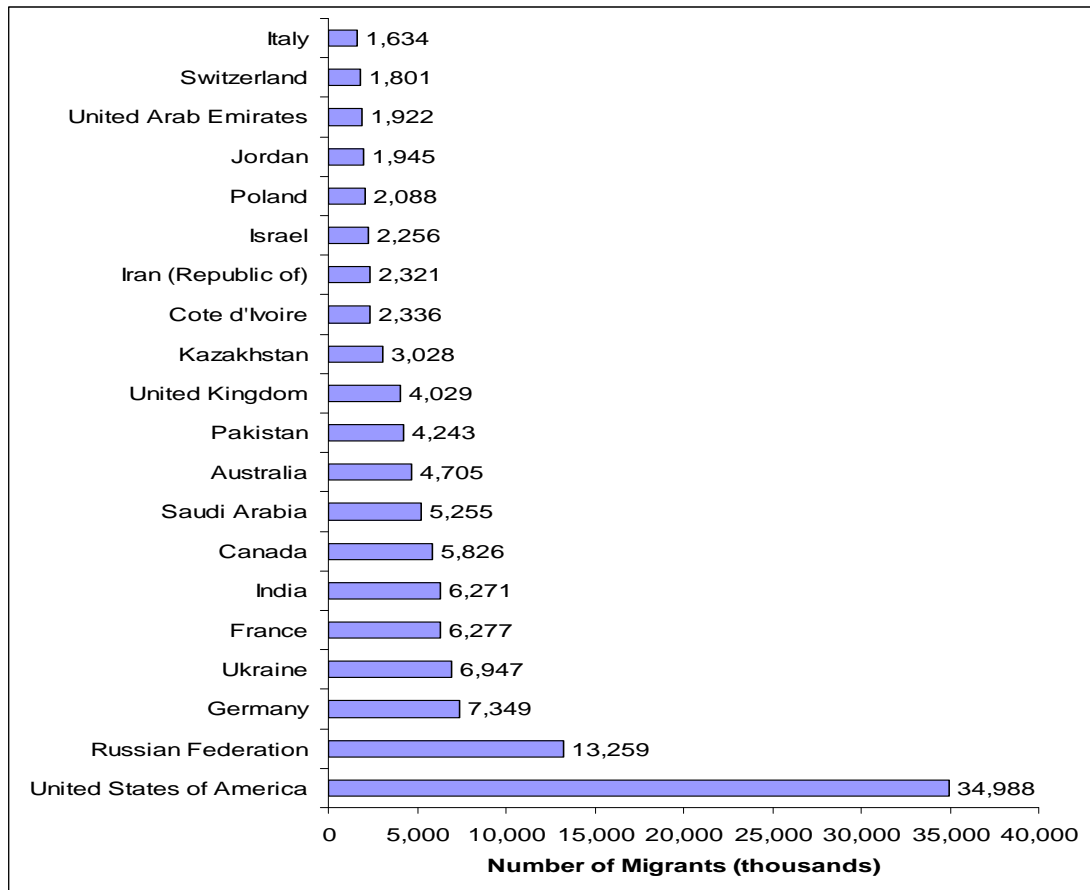
In the ten years from 1990 to 2000, the number of migrants in the world increased by 21 million persons, or 14 per cent. The total net growth of migrants took place in the more developed regions. Europe, Northern America, Australia, New Zealand and Japan in total registered an increase of migrant stock of 23 million (28 per cent). The number of migrants in Northern America grew by 13 million (48 per cent) while Europe's migrant population increased by 8 million (16 per cent). In contrast, the migrant population of the less developed regions fell by 2 million during the same period (IM, 2002).

In just five years from 1995-2000, the more developed regions of the world received nearly 12 million migrants from the less developed regions, an estimated two point three million migrants per year. The largest gains per year were made by Northern America, which absorbed one point four million migrants annually, followed by Europe with an annual net gain of point eight million and lastly Oceania, with a more modest net intake of 90 000 migrants annually (IM, 2002).

The top 20 countries with the largest international migrant stock are shown in Figure Five. With 35 million migrants, the United States is host to the largest number of migrants, followed by the Russian Federation with 13 million and Germany with seven million.

Figure 5: Countries with the Highest Number of Migration Stock

(IM Report, 2002:3)



2.12.1 Benefits for Receiving Countries

Migration can bring economic gains for receiving countries when the new workers complement instead of substitute the existing workforce. For example, a country would benefit if they mainly have skilled workers, and they import unskilled workers through migration (Kleinman, 2003).

On the other hand, the immigration of skilled persons is normally accompanied by the importation of considerable private wealth (Meyer *et al.* 2001). These immigrants often bring advantageous links with other cultures and markets, a strong work ethic and a positive entrepreneurial spirit (Benson-Rea & Ralinson, 2003).

Labour-receiving countries further benefit from an increased consumer market for their domestic goods and services. They gain additional skills and expertise which, in turn, helps them to enhance their international competitiveness. International migration also serves as a regulator of domestic wages and employment standards (Crush & Williams, n.d.).

While it is true that migration generates gains in production and that the effect thereof is positive on development, the overall impact on the economy is not significant in relation to the size of the economy in most receiving countries. The same can be said for income: while it is undisputed that migration redistributes income between domestic labour groups, labour and capital, and between natives and immigrants, it is unlikely that the effect thereof would be large (Kleinman, 2003).

On the whole, OECD countries benefit from the international mobility of skilled workers. The net gain amounts to one point six per cent in 2000, compared with one per cent in 1990. The net brain gain has globally improved in all OECD countries. The main winners of this brain gain are Australia, Canada and Luxemburg, followed by the United States, Switzerland and New Zealand; conversely Ireland, Greece, and Portugal experienced a brain loss of two per cent (World Bank, 2006).

Table 3: Net Brain Gain in OECD Countries in 2000

(World Bank, 2006:182)

	Working-age immigrants (total)	Working-age natives (total)	Proportion of immigrants among residents	Working-age immigrants (primary)	Working-age immigrants (secondary)	Working-age immigrants (tertiary)
Australia	4, 075, 721	12, 521, 000	24.6%	1, 293, 435	1, 242, 616	1, 539, 670
Austria	816, 001	5, 802, 000	12.3%	387, 425	325, 337	103, 239
Belgium	867, 620	7, 233, 000	10.7%	485, 386	195, 983	186, 186
Canada	4, 661, 330	20, 805, 000	18.3%	1, 378, 260	540, 980	2, 742, 090
Czech Republic (**)	410, 249	7, 017, 000	5.5%	155, 660	191, 239	59, 631
Denmark	169, 664	3, 748, 000	4.3%	37, 734	53, 611	31, 873
Finland	90, 511	3, 580, 000	2.5%	44, 051	24, 945	21, 515
France	3, 755, 514	40, 418, 000	8.5%	2, 802, 954	337, 962	614, 598



Germany	4, 746, 000	60, 269, 000	7.3%	2, 545, 000	578, 000	996, 000
Greece	106, 041	7, 750, 000	1.3%	35, 484	43, 160	23, 810
Hungary	251, 715	6, 836, 000	3.6%	109, 307	87, 908	54, 502
Iceland	16, 927	174, 000	8.9%	3, 851	7, 016	4, 512
Ireland	281, 232	2, 309, 000	10.9%	23, 495	127, 146	115, 721
Italy	923, 788	42, 627, 000	2.1%	488, 538	292, 781	142, 469
Japan	951, 302	92, 337, 000	1.0%	325, 594	275, 692	328, 870
Korea, Rep. of (*)	150, 812	42, 289, 000	0.4%	51, 617	43, 706	52, 137
Luxembourg	114, 625	303, 000	27.4%	37, 780	36, 644	29, 321
Mexico	417, 371	45, 226, 000	0.9%	139, 186	119, 414	141, 912
Netherlands	1, 320, 320	11, 109, 000	10.6%	715, 337	351, 331	253, 651
New Zealand	603, 606	2, 400, 000	20.1%	93, 909	182, 109	232, 296
Norway	204, 182	3, 051, 000	6.3%	5, 693	112, 202	64, 239
Poland	741, 517	24, 675, 000	2.9%	441, 529	187, 418	103, 496
Portugal	207, 476	6, 889, 000	2.9%	122, 236	43, 137	29, 816
Slovak Republic (**)	426, 072	3, 416, 000	11.1%	321, 721	17, 124	41, 989
Spain	1, 370, 657	28, 839, 000	4.5%	440, 493	700, 005	230, 159
Sweden	805, 143	6, 219, 000	11.5%	201, 319	335, 463	220, 731
Switzerland	1, 704, 948	5, 200, 000	24.7%	119, 714	970, 084	286, 682
Turkey	826, 110	33, 130, 000	2.4%	449, 020	232, 450	141, 034
United Kingdom	3, 639, 907	40, 353, 000	8.3%	1, 334, 821	1, 048, 194	1, 256, 892
United States	24, 366, 085	183, 564, 000	11.7%	5, 608, 020	8, 403, 780	10, 354, 285
EU-15	19, 214	267, 448	6.7%	9, 702	4, 494	4, 256
Scandinavian countries	1, 286	16, 772	7.1%	293	533	343
OECD (in millions)	59, 022	750, 089	7.3%	20, 199	17, 107	20, 403

Table 4: Net Brain Gain for OECD Countries in 2000

(World Bank, 2006:184)

	Proportion of tertiary among immigrants (PI)	Proportion of tertiary among residents (PR)	Ration immigrants / residents (PI/PR)	Working-age expatriates (tertiary)	Net brain gain (immigrants - expatriates)	Net brain gain in % of working age residents
Australia	37.8%	34.0%	1, 112	116, 723	1, 422, 947	11.4%
Austria	12.7%	14.4%	0, 878	130, 487	-27, 248	-0.5%
Belgium	21.5%	27.5%	0, 782	102, 187	83, 999	1.2%
Canada	58.8%	51.5%	1, 143	516, 471	2, 225, 619	10.7%
Czech Republic (**)	14.5%	10.8%	1, 346	88, 112	-28, 481	0.4%
Denmark	18.8%	21.9%	0, 858	68, 643	-36, 770	-1.0%
Finland	23.8%	26.3%	0, 905	76, 132	-54, 617	-1.5%
France	16.4%	21.9%	0, 747	312, 494	302, 104	0.7%

Germany	21.0%	25.5%	0, 823	848, 414	147, 586	0.2%
Greece	22.5%	15.2%	1, 481	159, 895	-136, 085	-1.8%
Hungary	21.7%	12.0%	1, 804	124, 426	-69, 923	-1.0%
Iceland	26.7%	15.5%	1, 720	6, 589	-2, 086	-1.2%
Ireland	41.1%	21.7%	1, 900	209, 156	-93, 435	-4.0%
Italy	15.4%	8.7%	1, 781	408, 287	-265, 818	-0.6%
Japan	34.6%	24.6%	1, 404	268, 925	59, 946	0.1%
Korea, Rep. of (*)	34.6%	25.8%	1, 340	652, 894	-600, 757	-1.4%
Luxembourg	25.6%	27.5%	0, 932	7, 281	22, 040	7.3%
Mexico	34.0%	11.3%	3, 009	922, 964	-81, 052	-1.7%
Netherlands	19.2%	21.9%	0, 879	256, 762	-3, 111	0.0%
New Zealand	38.5%	25.9%	1, 489	161, 740	70, 556	2.9%
Norway	31.5%	21.8%	1, 447	46, 286	17, 953	0.6%
Poland	14.0%	11.1%	1, 257	449, 059	-345, 563	-1.4%
Portugal	14.4%	8.8%	1, 630	147, 438	-117, 622	-1.7%
Slovak Republic (**)	9.9%	11.6%	0, 850	79, 451	-37, 462	-1.1%
Spain	16.8%	12.2%	1, 372	159, 889	70, 271	0.2%
Sweden	27.4%	27.5%	0, 997	77, 703	143, 029	2.3%
Switzerland	16.8%	17.2%	0, 975	88, 051	198, 631	3.8%
Turkey	17.1%	8.5%	2, 008	174, 043	-33, 009	-0.1%
United Kingdom	34.5%	17.8%	1, 938	1, 441, 307	-184, 415	-0.5%
United States	42.5%	51.3%	0, 828	431, 330	9, 922, 955	5.4%
EU-15	23.1%	18.6%	1, 240	4, 406	-150	-0.1%
Scandinavian countries	29.3%	24.8%	1, 182	275	68	0.4%
OECD (in millions)	35.4%	27.6%	1, 279	8, 533	11, 870	1.6%

When looking at emigration statistics in absolute terms, the largest number of educated emigrants are from Europe (specifically the United Kingdom, Germany and Italy); Southern and Eastern Asia (including the Philippines, India, China, the Republic of Korea and the Democratic People's Republic of Korea, and Vietnam); and, to a lesser extent, Central America and Mexico. However, these emigrants mostly migrate to a few receiving countries, with the United States roughly taking 50 per cent - this jumps to 70 per cent if one includes Canada and Australia and increases to 85 per cent if the United Kingdom Germany and France are added (World Bank, 2006).

2.12.2 Disadvantages for receiving countries

For most labour-receiving countries the effects of labour migration is deemed to be successful in the short term (Crush & Williams, n.d.). The problem with migratory systems is that once they have started, it is virtually impossible for democratic countries who value human rights and international law to stop them (Olesen, 2002). Permanence brings a new set of problems, with second-generation migrants who have only unsubstantiated social and economic roots in their country of origin. Initially

migrants provide necessary labour to maintain economic growth during times of labour scarcities; conversely, as migration streams mature the need for foreign labour in host countries changes. The supply of labour becomes less reliant on demand because migrants do work locals do not want to, thus creating a structural dependence on immigrant labour (Crush & Williams, n.d.).

Once these migration networks are established, they form a power base that can exert pressure on the host country (Olesen, 2002). Second generation migrants also tend to be more assertive of their social and economic rights (Crush & Williams, n.d.). If countries try to close the immigration door, immigrants will use all available windows such as family reunification, asylum applications as well as illegal entry (Olesen, 2002). Receiving countries are subsequently concerned that about one-third of all migration movements across their borders are irregular and that the trend is on the upwards turn (Tayler, 2005). Irregular migration might be more accurately termed “unwanted migration” (Uehling, 2004).

The claim that large-scale immigration will be of great benefit to receiving countries is fraud with complexities. There are no guarantees that there will be any winners emerging from migration movements. The noteworthy consequences of sustained immigration are demographic, social and environmental. The challenges receiving countries face are unexpected and intractable social divisions, increased domestic unemployment, a weakening of national identity and cohesion, increased pressure on social services, political management of foreigners' integration into host society with the prospect of immigrants losing much of their own culture, and political management of citizen's resistance to foreign migrants (Coleman & Rowthorn, 2004; Crush & Williams, n.d.). Lastly, destination countries are cautious when opening up their borders because evidence suggests that current migrants find it harder to advance economically than previous cohorts (Kleinman, 2003).

2.12.3 Receiving Country Migration Policies

It is in the best interest of immigrants and host countries to develop policies that allow immigration through the traditional avenues such as family reunification, refugee status and meeting labour force demands (Weil, 2002). Migration policy should be concerned with the labour market, social cohesion, public protection, international development goals as well as human rights. The challenge for policy developers is to

get the balance right between these objectives (Kleinman, 2003).

Major receiving countries tend to deal with immigration in the following three ways; restriction, containment and selection (Crush & Williams, n.d.).

12.3.1 Restrictive measures

Empirical studies broadly suggest that a general support of democracy, economic development and trade will not minimise migration. Only restrictive migration policies in receiving countries, and working towards some minimal respect of basic human rights in least developed countries would reduce migration (Rotte, Vogler & Zimmermann, 1997). In reality, restrictive policies are frustrated by unprecedented entry pressures. These policies are diluted by amnesties, exceptions on humanitarian grounds, lack of political will, or incapacity to enforce the law. Legislation that regulates family reunion, asylum or illegal stay has been tightened in the past decade, with an apparent increase in undocumented migrants as a direct result. Furthermore, restricting economic migrants only force these people down different avenues such as asylum-seeker applications (Crush & Williams, n.d.). Skilled migration is not likely to cease in the near future. Consequently, restrictive or punitive attempts are likely to fail (Iredale, 1999).

12.3.2 Containment

The second philosophy that some governments subscribe to is that of containment, where governments attempt to keep people where they are: if not in their country of origin, then in micro-regions within macro-regions (Crush & Williams, n.d.). In this regard, it is widely accepted that huge inequalities between developed and undeveloped nations have a significant impact on migration, be that legal or illegal. A lack of collaboration between these two groups only intensifies migration (Weil, 2002). Collaboration on various migration fronts (i.e. readmission agreements, border control, combating illegal migration) is mainly subordinate to a strategy of minimising migration through development aid. Showing more consideration to the concerns of sending countries assists developed countries in obtaining their support on migration issues, and it further helps to reduce the negative impacts of migration. The aim of these collaboration agreements and containment policies is to encourage potential migrants to stay where they are, instead of limiting the possibilities of movement (Boswell, 2003). This approach is gradually winning ground around the world, as evidenced in regional agreements where borders are abolished, for example in the

EU. These agreements do, however, impose a heavy burden on states bordering these blocks, as the heaviest burden of border control falls on them (Crush & Williams, n.d.).

12.3.3 Increased Selectivity

Most receiving countries are moving towards a policy system that favours a selective approach that benefits skilled migrants (Crush & Williams, n.d.). The selection process varies according to whether permanent or non-permanent migration is dealt with. Temporary migration is largely in the hands of employers or recruiters, irrespective of the labour market test, and with governments only taking care of the application processing. Permanent migration takes place in a more government-controlled manner (Iredale, 1999). The control of government-directed migration is predominantly based on a quota system, whereby governments place an upper limit on the number of migrants they would allow (Myers & Papageoriou, 2002). Governments are faced with the balance between importing skills and ensuring that jobs go to locals first (Iredale, 1999).

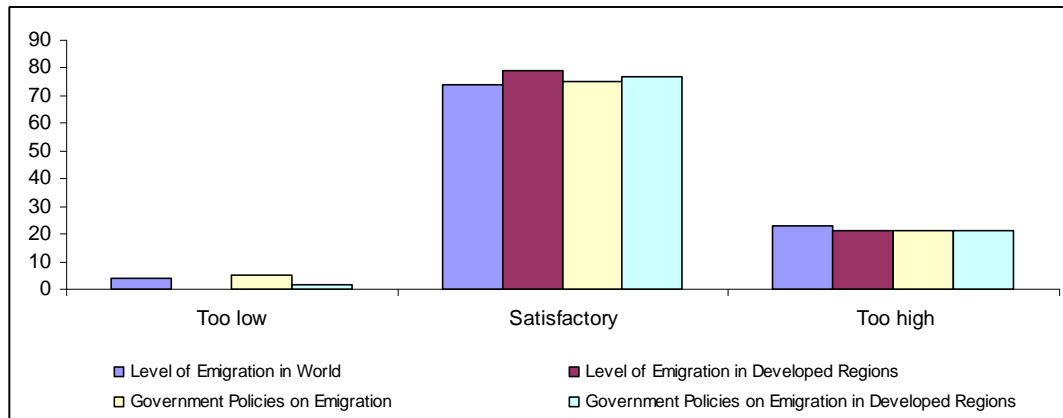
The increase in migration has resulted in a rising number of individuals with personal, political and economic ties in more than one country (Hansen, 1999). Migration is therefore a trans-national experience, while migration policies are formulated at a national level. However, governments cannot afford to operate in isolation when attempting to address migration concerns (Iredale, 1999). More than ever, the most beneficial policy for developed nations is one that regulates the circulation and re-circulation of the majority of immigrants, instead of blocking it (Weil, 2002). Governments in the developed world are subject to competing pressures. They have to take their domestic concerns as well as the concerns of sending countries into account. Sending governments may welcome easier access for their nationals into receiving countries because of perceived benefits, but they may very well not, due to the negative impacts of the brain drain (Kleinman, 2003).

In a study conducted by the United Nations (2002) officially 75 per cent of the world's governments felt that the level of immigration is satisfactory, with 23 per cent feeling it is too high and 2 per cent feeling that it is not high enough. The picture looks slightly different when the focus is placed on the more developed countries. Out of the 48 countries that were surveyed, only 67 per cent felt that the level of immigration was satisfactory, with 29 per cent feeling it is too high and only four per cent feeling

that it is too low. The United Nations research further found that 52 per cent of governments felt that their migration policies were satisfactory, while 44 per cent felt that it was too strict and only four per cent indicated that their policies were not strict enough (UN, 2000).

Figure 6: Government’s View on Level of Emigration

(UN, 2002:18-19)



When looking at Figure Six, the picture looks more or less the same when considering the level of emigration in the world with 74 per cent of governments feeling that emigration is satisfactory and 23 per cent feeling that it is too high. In the developed regions 79 per cent of governments felt that emigration levels are satisfactory with 21 per cent feeling that it is too high. At the same, time 75 per cent felt that their policies were adequate and 21 per cent again felt that it is too strict. However, migration does not effect every nation in the same way, and governments in developing countries may have a very different view on levels of migration and migration policies.

2.12.4 Benefits for sending countries

Developing countries are typically positioned as the losers when it comes to international migration. Words like ‘brain drain’ form popular headlines in the media, and are often the cause of mass hysteria. On many occasions, skilled migration boosted a developing country’s ability to draw global investment and trade linkages. In other countries there is a surplus of labour and migration therefore eases the pressure. More importantly, it is evident that migration does not have a “one-size-fits-all” effect on sending countries (Ouaked, 2002). For example, in countries where there is a surplus of labour, emigration can reduce the burden of unemployment and

increase remittances in the sending countries (Crush & Williams, n.d.).

Studying abroad has become an integral aspect of migration strategies. The benefit for sending countries is that students can participate in international academic exchange programmes allowing them to be up to date with the latest developments in their fields of study (Zhang, 2001). Studying abroad further allows students to become familiar with cutting-edge technology (Ouaked, 2002; Zhang, 2001). It also broadens student's horizons as they are exposed to more advanced and sophisticated work experiences and this will increase their human capital (Zhang, 2001). Back in the home country, migration options can also stimulate a desire for higher education, that in turn can increase the number of domestic students, and if some of them choose to stay, the sending country will benefit (Ouaked, 2002). Most importantly, as countries begin to recognise the importance of their talent, people management systems will also change and may produce policies that would encourage workers to return or encourage companies to make full use of the talent they have at their disposal (Zhang, 2001).

A second key dimension is the benefits that migration networks may hold for sending countries. These networks form an integral part of the 'connectedness' that drives the diffusion of new technologies, management strategies and trade. These networks are important if the goal of developing countries is to become integrated in the global economic market. The ties established by migrants may create new possibilities that can lead to economic growth. Migration networks increase access to external resources (Meyer, 2001)

When countries enter into co-development strategies they will experience a positive impact in three major domains 1) augmented circulation and non-immigrants due to better access to visas; 2) greater impact of remittances; and 3) return of skilled people, retirees and seasonal workers (Weil, 2002). Returnees can play a role in supporting democratisation and human rights at home by influencing their own governments (Martin, 2002). In some cases they may even encourage countries with limited human rights to improve, so that those who return and invent or innovate may profit from their work (Zhang, 2001). Return migrants can also pass on advanced skills to colleagues and this skills transfer is necessary for industrial growth (Crush & Williams, n.d.).

Table 5: Top 30 Emigration Countries in 2000

(World Bank, 2006:176-177)

All Countries	Lowest Selection Rates	Countries with Population above 5 million	Highest emigration rates, %	Countries with Population above 5 million	Lowest Emigration rates, %
Serbia and Montenegro	20.7%	Haiti	83.6%	Egypt, Arab Rep. of	4.6%
Liechtenstein	29.7%	Ghana	46.9%	Sweden	4.3%
Croatia	20.5%	Mozambique	45.1%	Bangladesh	4.3%
Gambia, The	20.4%	Kenya	38.4%	Spain	4.3%
Slovak Republic	20.0%	Lao PDR	37.4%	India	4.3%
FYR Macedonia	19.6%	Uganda	35.6%	Myanmar	4.0%
El Salvador	19.1%	Angola	33.0%	Paraguay	3.0%
Guatemala	19.0%	Somalia	32.7%	China	3.8%
Albania	18.4%	El Salvador	31.0%	Ukraine	3.5%
Sao Tome and Principe	18.4%	Sri Lanka	29.7%	France	3.4%
Suriname	18.4%	Nicaragua	29.6%	Venezuela, R.B	3.4%
Mozambique	17.7%	Hong Kong (China)	28.8%	Belarus	3.2%
Italy	17.3%	Cuba	28.7%	Australia	2.7%
Bosnia and Herzegovina	17.0%	Papua New Guinea	28.5%	Burkina Faso	2.6%
Angola	16.9%	Vietnam	27.1%	Argentina	2.5%
Senegal	16.7%	Rwanda	26.0%	Chad	2.4%
Bulgaria	16.4%	Honduras	24.4%	Thailand	2.4%
San Marino	16.0%	Guatemala	24.2%	Libya	2.4%
Cape Verde	15.2%	Afghanistan	23.3%	Brazil	2.2%
Tunisia	14.9%	Dominican Republic	21.6%	Indonesia	2.1%
Mexico	14.4%	Portugal	19.5%	Azerbaijan	2.0%
Guinea-Bissau	14.2%	Malawi	18.7%	Georgia	1.6%
Algeria	14.1%	Cambodia	18.3%	Russian Federation	1.5%
Tuvalu	13.8%	Senegal	17.7%	Japan	1.2%
Comoros	13.4%	Cameroon	17.2%	Kazakhstan	1.2%
Morocco	12.9%	Morocco	17.0%	Saudi Arabia	0.9%
Equatorial Guinea	12.4%	Zambia	16.8%	Uzbekistan	0.7%
Portugal	12.0%	Slovakia	16.0%	Swaziland	0.5%
Mali	10.9%	United Kingdom	16.7%	United States	0.5%
Turkey	8.8%	Mexico	15.3%	Tajikistan	0.4%

Table Five indicates that in relation to the educated labour force in the sending countries, the highest rates are observed in Central America and Africa (in Middle, Western, and Eastern Africa), as well as in the Caribbean and the Pacific area (World Bank, 2000). The emigration rate surpasses 80 per cent in nations such as Guyana, Jamaica, Haiti, and Grenada, and Cape Verde, the Gambia, Mauritius, Seychelles, and Sierra Leone are the major sending countries in Africa (World Bank, 2006)

The most important benefit, or the one most often mentioned are remittances. Remittances can be defined as the capital flows that are generated through labour

migration (Adamson, 2006). Many labour sending countries will struggle to cope without it (Olesen, 2002). At a macro-level, remittances are a currency that can be utilised to purchase needed foreign components and supplies, used to generate new jobs, or taxed by the sending country. At a micro-level, it is a much-needed extra income for families, who use it to purchase consumer durables, as investment in better housing, farmland, machinery or starting up small business (Martin & Straubhaar, 2002).

Remittances also support infrastructure development, social services, schools and roads (Martin, Martin & Weil, 2002). However, the benefits of remittances are discriminatory, although not exclusively, they tend to go to better-off households within the better-off communities in the better-off part of the developing world, because it is these households, communities and countries that tend to be the supplier of migrants (Nyberg-Sorensen *et al.* 2002).

Unfortunately, the debate on remittances has led to controversy. Although remittances relieve some of the sending countries' balance of payments, to appreciate the impact thereof it is useful to consider whether it is used productively (Crush & Williams, n.d.). Remittances are spent in three major ways, namely investment in land and housing (accounting for three quarters of total remittances); to purchase consumer goods, settle debts, and pay for family-oriented activities; and lastly, only a small fraction is invested in productive activities such as the purchase of agricultural equipment, financing of service sector activities or opening up of small businesses (Crush & Williams, n.d.). Even though about 60 per cent of all remittances go to developing countries, it should not be seen as a reliable or cost-effective source of income (Ouaked, 2002). Transfer costs can absorb up to 20 per cent of the amount, and evidence suggests that migrants who settle abroad remit less frequently over time than new migrants (Martin & Straubhaar, 2002; Ouaked, 2002).

2.12.5 Disadvantages for sending countries

Potential disadvantages for sending countries are the loss of skills and expertise and a demographic impact resulting in an increasingly ageing and unproductive population (Crush & Williams, n.d.). For most countries the migration rate is the highest among university graduates, and for countries like Ghana, Egypt and South Africa, 60 per cent of their emigrants are graduates (Olesen, 2002). A huge concern

for these countries is that skilled or graduate workers raise the productivity of the economy, and their emigration would therefore constitute a loss (Narayan & Smyth, 2003).

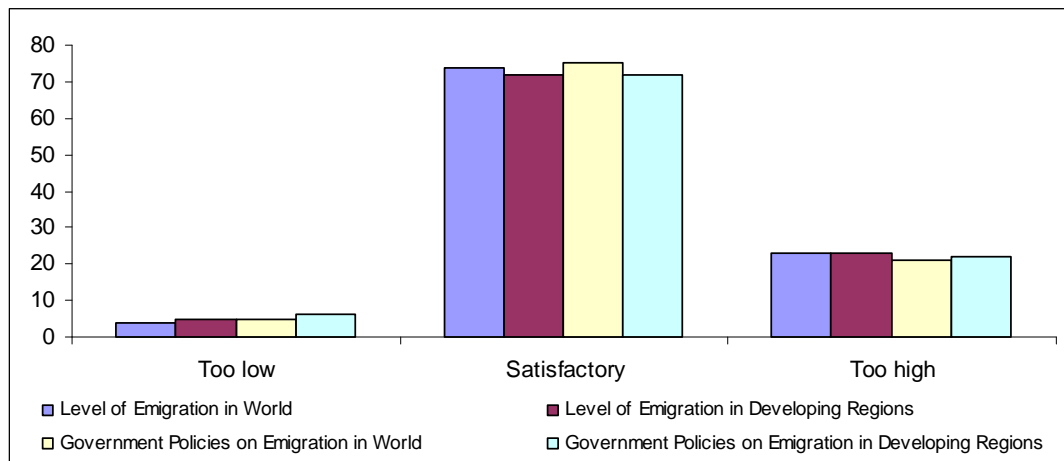
As all economies are becoming more dependent on knowledge, migration subsequently reduces the country's productive capability resulting in a decline in economic growth (Ouaked, 2002; Narayan & Smyth, 2003).

The human capital loss includes the cost of education, the loss of financial capital flows as well as the opportunity costs associated with replacing skilled people (Narayan & Smyth, 2003). Finally, another loss developing countries face is that of potential investment: it is hard to attract foreign investment if companies are unable to access the required skills to perform the job. Moreover, for many sending countries the beacon of hope that is held up high in terms of return migration holds little promise. Many African nations have such a low level of economic growth that they cannot dream to equal the salaries and employment conditions of more developed nations (Ouaked, 2002).

2.12.6 Sending Countries' Migration Policies

The challenge many sending countries are facing is the implementation of preventative measures to minimise loss and stimulate possible gains without reverting to or adopting prohibitive measures. One example is Singapore which actively maintains links with Singaporeans overseas to enhance their sense of belonging to their home country. India also encourages its skilled people to return home by offering five years' tax-free employment as well as other incentives if people set up their own business upon returning home. In Hong Kong steps have been taken to develop home ownership protection and provisions are made to allow citizens double passports. Other countries are looking towards tax measurements, where they tax their citizens for overseas earnings above a certain income. Some suggestions have been made to tax post-industrialised countries, with the funds being reinvested in developing countries that are affected by migration (Iredale, 1999).

Figure 7: Government's View on Level of and Policies on Immigration in Less Developed Regions
(UN, 2002:18-19).



In Figure Seven, 75 per cent of the world's governments thought the level of immigration is satisfactory as compared to 78 per cent of developing countries' governments. Twenty three per cent of global governments felt that immigration is too high as compared to 21 per cent in the developing world. Fifty six per cent of global governments felt immigration policies are satisfactory as compared to 40 per cent who felt it is too high. Fifty eight per cent of developing regions felt that it is satisfactory, and 39 per cent felt that it is too high.

2.13 South Africa and Migration

South Africa has a long history of migration; however, longstanding patterns, forms and dynamics have undergone major restructuring in the previous two decades, with considerable implications for sound migration practices, livelihood strategies for the poor, human rights observations as well as poverty and inequality reduction policies (Black, Crush & Peberdy, 2006).

South Africa is the major migrant receiving country in the Southern African region, with the overall number of 'visitors' increasing from a mere 500 000 in 1990 to 5 million per annum at present. The 2001 official census indicated 1 025 072 foreign-born individuals in South Africa of which 687 678 are from within the SADC region, 228 318 from Europe and 41 817 from the rest of Africa (Black *et al.*, 2006).

The brain drain is a major point of concern for the country, where official emigration statistics clearly undercount the extent of the loss (Black *et al.*, 2006). Official data indicates that for the period 1989 to 1997, 81 811 people emigrated, whereas official statistics for the same period from the five major receiving countries show that 233 609 South Africans entered as immigrants over the same time period (Black *et al.*, 2006). The five major receiving countries of South African emigrants are the United Kingdom, Australia, New Zealand, Canada and the United States of America.

South Africa is one of the few countries in Africa that is not only a sender of people but also a receiver of international labour. Although the actual figures are dubious and a point of sharp debate, few people in South Africa will deny the fact that the country is home to many immigrants from across Africa, especially neighbouring countries like Mozambique, Zimbabwe and Botswana. On the surface this may seem like a brain gain for South Africa, however, estimations are that the majority of immigrants are not economically active, and 60 per cent of emigrants are graduates (Olesen, 2002). A survey by the South African Migration Project team in 1999 of 200 South African public and private enterprises found a mere 2 000-3 000 skilled foreign personnel in employment. The survey further indicated that 41 per cent of enterprises said that the brain drain had 'no importance' to their operations with a further 26 per cent adding that the impact was minimal. These results suggest that at present there is no overall shortage of skills, however, there are certain industries or sectors that are reporting more severe shortages (Black *et al.*, 2006)

Virtually all analyses of the brain drain impact on South Africa have focused on the negative aspects of skilled migration. Migration issues have been central to the post-apartheid government policy agenda; however, the process has been painstakingly slow due to political disagreement. South Africa's first Refugee Act took four years to write, and the new Immigration Act (that replaced the Aliens Control Act) took almost ten years (Black *et al.*, 2006).

There are a few migration-related issues confronting the South African government. Firstly, for a country with such a sophisticated infrastructure for data collection, migration policies decisions seem to be made in an information vacuum. Secondly, the government attempts to restrict emigration by trying to secure agreements with receiving countries not to recruit actively in South Africa. The government's attempts to limit migration through bonding or compulsory national service are more likely to speed this process up instead (Black *et al.*, 2006). The difficulty is that once migration linkages are established - as in the case with the five major receiving countries - it is almost impossible to reverse, and any migration policy that attempts to do so is doomed to fail (Crush & Williams, n.d.). Thirdly, migration is a significant survival strategy for hundreds of thousands of households throughout Southern Africa (Black *et al.*, 2006). There is much research to be done before South Africa will be able to manage the effects of migration effectively, and although South Africa can learn from the mistakes of other countries, models cannot simply be transplanted from one context to another (Crush & Williams, 2001).

2.14 Conclusion

In this study the focus is on expatriates who undertake short-term offshore assignments. Globalisation paved the way for companies to set up businesses across the globe. However, the road is far from smooth for both the company and the expatriate. Companies and expatriates make use of migration networks. Companies may choose to venture into countries that other businesses have also ventured into, for example Zambia, Botswana, Mozambique and Angola, instead of being the first foreign company in a particular country. The same is true for expatriates: they either enter countries where their own company has set up a business or they make use of a network of family or friends who are living in a particular country to find employment. Australia, the UK and Canada are good examples of such practices.

However, the reasons people offer for becoming expatriates are numerous, and are personal and situation-specific. At the same time, countries are becoming more and more selective in terms of who they allow into the country, adopting point systems – as in, for example, Australia and the UK - or only allowing a certain number of work visas per year, as is the case in, for instance, America. The selectivity of migration is at the heart of the brain drain, with receiving countries only allowing skilled people to

cross their borders and sending countries losing their best skilled workforce (World Bank, 2006).

In essence, the dream when becoming an expatriate is often to better personal circumstances, to gain maximum return on investment, and possibly to further one's career. The literature indicates, however, that this is not necessarily true for everyone. Joly (2000) propounds that the degree to which a person will fit into his or her host country is largely dependent on the reason for migration and the amount of baggage he or she has. However, it is slightly more complicated than that. A person's personality, values and competencies play a vital role. Chapter Three will explore this in more detail.

The cost associated with migration is tremendous on all levels Chapter Two discussed specifically the effect of migration on sending and receiving countries. This is important to understand because governments tend to legislate upon their perceived effect of migration on their own nation, and they may make it very hard for expatriates to get work permits. If citizens view migration as a threat to their country and, by extension, to their jobs, expatriates may not be welcomed and locals may refuse to assist their new expatriate managers, making it impossible for him or her to succeed, and the expatriates' failure may lead to the failure of the company. Chapter Two therefore set the context for expatriates on a global scale, and Chapter Three will take a closer look at the characteristics, competencies and career management of expatriates.

3 Chapter 3: Career management

Chapter Three explores the concepts of the world of work in the 21st century, career development versus career management, and the effect of expatriate assignments on career management. The second part of Chapter Three present the characteristics of expatriates, cross-cultural competence, expatriate adjustment and the role of multi-national companies and HR in expatriate career management.

3.1 Changes in the World of Work for the 21st Century

Career and life are inseparable, and a satisfying career can be seen as a major contributor to a happy life (Lau & Pang, 1995). The concept of work finds meaning in people's lives on two levels. Firstly it sustains life in terms of biological survival, and secondly, it is a large contributor to a person's quality of living. Quality of life is expressed in a search for meaning and a higher purpose, and work activities and life roles take centre stage in a changing work context and uncertain markets where work environments have less boundaries, are more service-driven and technology-intensive (Coetzee & Schreuder, 2006).

The meaning of work is greatly influenced by the sense of making a difference in society through work; the match between personal values and values in the workplace; the ability to exert power through economic activity; the place an individual can achieve in the social status hierarchy; the degree to which work is viewed as a central life interest; the level of self-actualisation a person can achieve through work activities; individual competence; and lastly, the search for spiritual wholeness within the context of the workplace (Coetzee & Schreuder, 2006). As everything changes, traditional careers are also changing in the new world of work.

Hanking (in Coetzee & Schreuder, 2006) identifies five trends that will influence the world of work significantly in the coming decades, such as increased career spans due to medical advances, financial pressure and a personal desire to continue working long past retirement age. These factors also lead to multi-generations working side-by-side, with altering and often competing needs, values and expectations from employers. Varied household types challenge employers to make flexibility a key component of their benefit package. Growing multiculturalism requires a corporate culture that encompasses this diversity, and employees are increasingly demanding individual respect and ethical conduct from their employers as a way of

achieving personal growth, balance and meaningful purpose through their work.

The Work Design Collaborative (Coetzee & Schreuder, 2006) made the following 12 predictions in 2003:

1. The social bond between employees and the organisation will decrease.
2. Employees will become highly networked, and will form teams based on projects.
3. Guilds or confederations will return as a primary social structure, taking responsibility for recruitment and the enforcement of ethical standards and professionalism.
4. Work activity will take place in a greater set of locations, with up to 60 per cent of the workforce working on multiple sites.
5. The normal eight-to-five workday will be spread out to a 14 hour window, allowing for flexible work schedules, communication across continents and personal work-life-balance preferences.
6. People will focus 80 per cent of their time on what they do best, and collaborate with other professionals with complementary competencies for everything else.
7. Large corporations will transform into smaller confederations where liability is shared, and the risk of controlling large asset bases is minimised.
8. Central business support functions such as finance, marketing and human resources will continue to become a business in itself.
9. Mastering ambiguity will become an important skill in a world where change and uncertainty are a permanent condition.
10. A very strong emphasis will be placed on producing results, and stars will be those employees who bridge the gap between ideas and bringing products to the market.
11. A key value of employees will be entrenched in the amount of social capital they can bring to a project, where this is defined as the extent and strength of social bonds that exist within their formal and informal networks.
12. The social contract between employer and employee will change, where employees are focusing on enhancing their quality of life, and employers are looking towards minimising risks.

These changes imply that although employees may have more choice, flexibility and benefits than previous generations, what they are giving up is job security, much

face-to-face contact with colleagues and their future (including personal development) will be in their own hands. The competent and ambitious will most likely flourish under these conditions, whereas the less able and less educated are likely to fall in an employment underclass (Coetzee & Schreuder, 2006:31). The implication for employees is that they will need to move away from career development towards career management. Employees will need to learn how to manage a growing number of variables and how to capitalise on opportunities.

3.2 Implications of change for modern careers

The changes that we see both in the world of work as well as in employees naturally have an impact on traditional careers. Recent employment patterns suggest that people will hold multiple jobs and careers throughout their lifetime (Coetzee & Schreuder, 2006; Coetzee & Roythorne-Jacobs, 2007). Lifelong job security with one employer is replaced by employability, where employees offer increased working hours, additional responsibility, tolerance for ambiguity and more skills. Employers, on the other hand, bring higher pay, reward for performance, lateral moves and development opportunities to the table (Coetzee & Roythorne-Jacobs 2007).

There are various types of modern careers (Greenhaus, Callanan & Kaplan, 1995; Coetzee & Schreuder, 2006);

1. Protean careers are characterised by personal management, which comprises the individual's education, training, experience in several companies, changes in occupational field, a high degree of mobility, self-reliance and career thinking.
2. Boundaryless careers are shaped by flexibility and movement between different global organisational contexts.
3. Composite careers are marked by individuals who hold more than one form of employment or career at any given time.
4. Traditional linear careers describe the upward mobility in any given profession.
5. An expert career emphasises stability in a speciality area with little upward advancement.
6. Transitory careers are marked by changes in career fields as often as every three to five years.

7. Entrepreneurial careers are fashioned by individuals who choose self-employment as a career option.

Expatriate assignments often fit the boundaryless career category, which provides ample opportunity for identity change and accumulation of knowledge. Boundaryless careers vary from traditional careers in that they necessitate intermittent cycles of attaining new skills. The expatriate assignment with its pre-departure, expatriation and repatriation provides generous opportunity for the expatriate to equip him or herself with new skills (Mezias & Scandura, 2004).

Expatriate careers can also fit the protean category. Hall (1976:201) defined protean careers as: “a process which the person, not the organisation, is managing. It consists of all the person’s varied experiences in education, training, work in several organisations, changes in the occupational field, etc. The protean career is not what happens to the person in any one organisation...” Protean careers shift the accountability of career development from the organisation to the individual. Protean expatriates are, therefore, in control of their own careers (Mezias & Scandura, 2004).

3.3 Career Management

The emphasis is shifting from career development to career management, where individuals are increasingly taking up the challenge of holding full responsibility for their own development and subsequent careers. Career development is defined as the *ongoing process* whereby people pass through consecutive stages, each identified by a fairly unique set of circumstances. The focus is on the progression through these stages and not necessarily on the management thereof. It is therefore possible for the individual to leave all responsibility in the hands of the employer. However, career management also refers to an ongoing process, but it places a strong focus on individual responsibility. Career management typically goes through a series of six stages whereby the individual: acquires self-knowledge, knowledge of employment prospects, formulates career-centred goals and strategies, implements and experiments and, lastly, receives feedback on the effectiveness and applicability of the strategy and implementation thereof (Coetzee & Schreuder, 2006).

A classic professional career will normally proceed through these development phases, each of which is defined by a visible change in the person’s sense of self,

and to some extent fashioned and influenced by the employing organisation (Coetzee & Roythorne-Jacobs, 2007). Taking responsibility for managing one's own career demands certain career competencies from the individual. Individuals will need to understand their own values, attitudes, internal needs, identity and preferred lifestyle. They need to know what expertise, capabilities, and tacit and explicit knowledge are required from them. They should know with whom to build networking relationships and must be able to contact the right people. They will need to know when and where to enter the workplace, find relevant training and how to advance their career. They must also have a sense of timing their choices and activities to achieve maximum return on investment (Coetzee & Schreuder, 2006).

Career management can therefore be seen as a developmental process which helps an individual to grow and progress personally as well as professionally, based on a purposeful direction and economy orientation, to achieve tangible and intangible rewards. Career has a high connection to marketing demand, implying that 'good marketability' of a graduate would bring a good career path or vice versa (Lau & Pang, 1995).

3.4 Characteristics of Expatriates

Boneva and Frieze (2001) argued that individuals who want to emigrate have a pattern of personality characteristics that distinguishes them from those who want to stay in their home country. Through a study conducted across six cultures the authors showed that those who want to emigrate tend to be more work-oriented, have higher achievement⁴ and power motivation⁵, but lower affiliation motivation⁶ and family centrality than those who wanted to remain in their country of origin. Emmerij (2004) asserts that the typical migrant already has a minimum entrepreneurial drive.

They identified four 'personality types': the mobicentric man, the pioneering personality, aspirers, and the restless individual (Boneva & Frieze, 2001).

⁴ Achievement motive: "a recurrent concern to surpass one's own standard of excellence or to do something challenging and unique" (Boneva & Frieze, 2001:482).

⁵ Power motivation: "a concern about having control over or impact on others, which is often expressed as a desire to be recognised and to impress others" (Boneva & Frieze, 2001:482).

⁶ Affiliation motivation: "a concern for social acceptance or a desire to establish and maintain interpersonal relations (Boneva & Frieze, 2001:482).

1. The mobicentric man is an individual who is continually on the go, placing a high value on motion and action (Jennings 1970 in Boneva & Frieze, 2001).
2. For individuals who seem to like relocating geographically, their decision to emigrate is based as much on the novelty *per se*, as the perceived economic opportunity in the destination country. This group is referred to as pioneering individuals (Morrison & Wheeler in Boneva & Frieze, 2001)
3. Aspirers are those who migrate due to an general dissatisfaction with their current reality - they emigrate because they aspire to do better for themselves and their children (Taylor, 1969 in Boneva & Frieze, 2001).
4. The last group of people are the restless ones - they tend to have a high achievement motivation with a tendency to travel in a constant search for more challenging goals (Kolp, 1965 in Boneva & Frieze, 2001). Individuals who migrated once are more willing to relocate again, suggesting that they are not merely responding to a explicit set of economic conditions, but that there is something specific about their personalities (Boneva & Frieze, 2001).

Various studies list personality traits as antecedents to the effective acquisition of cross-cultural competence, such traits include: extroversion (Shaffer, Gregerson, Ferzandi, Harrison & Black, 2006; Lee & Crocker, 2006), agreeableness (Shaffer et al., 2006; Holopainen & Bjorkman, 2006; Lee & Crocker, 2006), conscientiousness (Shaffer et al., 2006; Lee & Crocker, 2006), emotional stability (Shaffer et al., 2006; Lee & Crocker, 2006), openness and intellect (Shaffer et al., 2006; Lee & Crocker, 2006; Gowan & Ochoa, 1998), cultural flexibility (Shaffer et al., 2006; Lee & Crocker, 2006; Gowan & Ochoa, 1998; Grzeda, 1999), stress tolerance (Holopainen & Bjorkman, 2006; Gowan & Ochoa, 1998; Naumann, 1992), relational ability (Holopainen & Bjorkman, 2006; Naumann, 1992), communication (Holopainen & Bjorkman, 2006; Gowan & Ochoa, 1998; Naumann, 1992), career resilience (Grzeda, 1999), internal locus of control (Grzeda, 1999), self-respect (Grzeda, 1999) and tolerance of ambiguity (Naumann, 1992).

The predicament with lists like these is that they contain dozens of sought-after traits, yet they do not indicate which attributes are more essential than others in the development of requisite behaviours (Johnson *et al.*, 2006). Even though some studies attempted to classify personality traits or characteristics and develop a perfect expatriate prototype, advancement in this area has been fraught by a lack of convincing, overarching theory as well as a lack of predictive studies. In recent

attempts studies have begun to differentiate between broad personally traits, such as the Big Five and more specific behavioural competencies or traits. Unfortunately, the inadequate number of empirical studies mostly used cross-sectional (concurrent) designs, often depending on attributions or ratings by human resource managers. Therefore, the predictive set of personal requirements for expatriate effectiveness remains elusive (Shaffer et al., 2006).

Individuals who have the basic skills, knowledge and attributes that will permit them to perform productively in another country may still find it hard to attain a high level of job performance in the face of cross-cultural obstacles that challenge international business (Johnson *et al.*,2006). In addition to personality characteristics technical competence, previous cross-cultural experience and extensive foreign travel are contributing factors to the success of expatriates (Lee & Crocker, 2006).

3.5 Cross-Cultural Competence

International assignments present individuals with opportunities to experience new levels of autonomy, independence, adaptability, transience, self-directed learning and multiculturalism, which are increasingly a requirement for 21st century careers. On the one hand the literature argues for the benefits of an overseas experience in terms of enhanced opportunities for personal and career development, and suggests that these individuals will provide their future companies with a competitive advantage due to their newly acquired skills. On the other hand, the literature warns that not all people are equally equipped or may lack the personality traits needed to acquire the skills and knowledge for success in another country (Johnson *et al.*, 2006).

The Oxford Dictionary defines competence as the “capacity, skill or ability to do something correctly or efficiently” (Oxford, 2006:153). When this definition is applied to a cross-cultural context, it refers to a person’s ability to function successfully in or with another culture. Johnson *et al.* (2006) define cross-cultural competence in international business as a person’s success in drawing on an inherent base of knowledge, skills and personal attributes with the intention of working effectively with people from various national or international backgrounds, both at home and offshore. Cross-cultural competence therefore comprises three factors: knowledge, skills and attitude (Johnson *et al.*, 2006).

Knowledge of another's beliefs, values and culture is an important determinant of a person's ability to reduce the number of misinterpretations with someone from another culture. Cultural knowledge has a positive effect on other cross-cultural competencies or attributes and can therefore enhance overall cultural competency (Johnson *et al.*, 2006). Cultural knowledge can be divided into two different types, namely culture-general knowledge, and culture-specific knowledge.

Culture-general knowledge refers to a person's awareness and knowledge of cultural differences, and an examination of the person's own mental makeup with reflection on similarities and differences. The focus is less on how to live in another culture rather on more how to work successfully with another culture. Culture-general knowledge will include aspects such as components of culture, how cultural values are learned, various frameworks for understanding and comparing contrasting and different cultures, general knowledge of the multifaceted arena in which international business operates as well as the various economical, political, legal, social, financial and technological systems that co-exist in global business (Johnson *et al.*, 2006).

Culture-specific knowledge, on the other hand, entails precise knowledge of another culture - geography, economics, politics, law, history, customs, hygiene, what-to-do, what-not-to-do, is less concerned with the person's own cultural introspection. There are three types of cultural-specific knowledge: factional, conceptual and attributional knowledge. Factional and conceptual knowledge are explicit, and therefore easily taught through lectures and books. Factional knowledge refers to the history, political and economical systems and institutions as well as social structures, whereas conceptual knowledge pertains to the cultural group's value system and how these values are reflected in their behaviour; and this requires the person to step out of his or her own cultural preconceptions in order to understand another set of values. Attributional knowledge is tacit, informal and personal, and subsequently difficult to convey or teach in a formal environment. These attributes are better understood and learned during socialisation. Attributional knowledge reflects on an enhanced awareness of appropriate behaviour relying on both factional and conceptual knowledge with the purpose of accurately interpreting the behaviour of the individual in the target culture (Johnson *et al.*, 2006).

Although knowledge and awareness are necessary, these are not sufficient for successful performance in a cross-cultural context, since the individual must also

have the motivation to apply the newly acquired knowledge. Cross-cultural competence is a direct consequence of behavioural adjustments that individuals make in order to relate successfully with people from various cultures, irrespective of the context: be that the person's home culture, an international business context or on international soil. Individuals who demonstrate a conducive attitude in terms of cross-cultural competence have a strong personality, are sensitive to the effective processes of culture, and maintain an active social relationship with the cultural group (Johnson *et al.*, 2006).

Acquiring knowledge and being motivated to use and apply the knowledge is not sufficient to be effective in a cross-cultural context. The person must also have the ability to step outside his/her own cultural boundaries in order to make the strange familiar and, lastly, to act on that changed perspective. Having cross-cultural skills can refer to the ability to clearly communicate in the language of the focus culture or to perform specifically functioned behaviour, to negotiate the institutional structures of the culture, adapting to behavioural norms of the different cultural environment, effective stress management and conflict resolution, to name but a few. Cross-cultural skill in international business refers to a person's effectiveness in drawing upon a repertoire of skills, knowledge and attributes both at home and abroad (Johnson *et al.*, 2006).

3.6 Expatriate Adjustment

Central to a person's success in any environment is his or her adjustment to that context. Adjustment can be defined as the behavioural adaptation to a particular environment or set of circumstances (Oxford, 2006). For the expatriate, this refers to their subjective well-being or satisfaction in the new cultural environment (Selmer, Chiu, & Shenkar, 2007). Expatriate adjustment, development and retention are key factors in international business success. The capacity to assimilate and transfer knowledge across borders is often the primary function of multi-national companies. This skill, however, is dependant on an expatriate's ability to make sense of tacit knowledge, to function in a different organisational unit and in a different country. Their adjustment is subsequently critical for developing a competitive advantage through knowledge transfer (Mezias & Scandura, 2004). Maladjusted expatriates are incapable or reluctant to acknowledge the host country's behaviours, norms and values, and may even view the host culture as inferior to their own; they tend to stick

to their home country whenever feasible (Stahl & Caligiuri, 2005).

International assignments demand various levels of adjustment: to the host culture (interacting with host nationals), their work roles and also adjustment to the general non-work environment (Shaffer et al., 2006; Stahl & Caligiuri, 2005).

Expatriates rely on both organisational socialisation and social support for healthy adjustment. Organisational adjustment is seen as the process whereby the expatriate is familiarised with the values, expected behaviours, social knowledge as well as other significant features of the host country's organisational context. Newcomers can be expected to pass through four stages of adjustment. First on the list is the group process or social integration – being sensitive to group norms and values, understanding formal and informal work relationships, awareness of which people are more knowledgeable and powerful than others and knowing how to relate and fit are key. The second stage is marked by task mastery or being able to perform on a proficient level. In this stage expatriates learn the tasks involved in the job (knowledge, skills and abilities), their important duties, assignments and priorities, how to handle routine problems, and how to obtain necessary information. In the third stage expatriates are adjusting to work roles and clarifying their roles. During this stage they gain understanding of the boundaries of authority, responsibility and knowledge of appropriate behaviour. The last stage entails acculturation or gaining appreciation of politics, power, goals, and value premises of the organisation, knowledge of the organisation's mission, special language, key legends, myths, stories and the management and leadership (Harvey & Wiese, 1998).

Adjustment has a positive influence on satisfaction, commitment and involvement with regard to the company in the foreign assignment. The greater the degree of adjustment, the more positive the expatriate's attitude is likely to be. There is a positive correlation between expatriate satisfaction, commitment and association with the company in the foreign assignment and the intent to remain in that assignment (Naumann, 1992). International assignments tend to generate more stress, uncertainty, and ambiguity than almost any other assignment, and they greatly affect expatriate careers. Many employees are reluctant to accept this challenge for personal reasons, but also because they lack confidence in information received about the assignment and fear being passed over for promotion while expatriated (Mezias & Scandura, 2004).

3.7 The Role of Multi-National Companies and HR in Expatriate Management

Globalisation paved the way for many firms around the world to seek new markets for their products, new sources for raw materials, and new, more cost-effective locations for manufacturing and assembly operations (Johnson *et al.*, 2006). Although a few of these foreign undertakings succeed, most do not. The incapacity of firms and their managers to adjust to the requirements of the international business arena is seen as the primary reason for failure. Two emerging themes are expatriate failure and the overall inability of head office managers to understand the cultural challenges of doing offshore business (Johnson *et al.*, 2006). Therefore, the potential of multinational companies' (MNCs) competitiveness in an international economy is conditionally dependent on those companies' capacity to change and acclimatise their resources advantageously to the nuances of the expanding international playing field. Within this global playing field, it is human resource managers who are tasked with the challenge of developing practices to manage talent in ways that are aligned with the overall strategic plan of their respective firms – while simultaneously balancing the economic, social, political and legal constancy of the subsequent host countries. This balancing act demands a detailed focus on the correspondence between the strategic direction of the firm as well as HR management practices (Caligiuri & Colakoglu, 2007).

MNCs typically have three overarching international strategies that will produce different long-term and short term firm-level results. MNCs with a local strategy will configure their capabilities to be decentralised and nationally self-sufficient; the role of foreign subsidiaries will be to sense and exploit local opportunities, knowledge will mostly be created in the subsidiary and retained there, and staffing is likely to be polycentric⁷. With a centralised strategy, companies tend to concentrate and globally scale their capabilities; the role of the foreign subsidiary is focused on implementing parent company strategy, and therefore knowledge is created and retained centrally,

⁷ Polycentrism: "the fact, principle, or advocacy of the existence of more than one guiding or predominant ideological of political system or alliance" (Collins, 2007:1258). Polycentric therefore, in this context, means that employers will have more than one strategy of employment, and are likely to employ people from the host country, the sending country, and from other nationalities and backgrounds.

and resource strategies tend to be ethnocentric⁸. Lastly, global companies adapt their capabilities to be dispersed and interdependent; the roles and contribution of foreign subsidiaries are differentiated where knowledge is created jointly and are shared globally, and a selection of employees is geocentric⁹ (Caligiuri & Colakoglu, 2007).

At the same time, there are four categories of expatriate assignments: technical assignment, functional assignments, development assignment and strategic assignments (Caligiuri & Colakoglu, 2007).

- Technical assignments are not focused on expatriate development, require very little intercultural competence, if any, and the main responsibility of such employees is to complete a job and return home.
- Functional assignments: these require intercultural competence since interaction with host nationals is necessary, development is not a stated goal, and the central responsibility is to complete the job and return home.
- Developmental assignments: as the name suggests, has at its core development opportunities for expatriates. Although intercultural competence is not a prerequisite, it tends to develop while on assignment, and the purpose of this type of assignment is to be exposed to other countries, diverse markets, and to work across functions in various jobs on a rotational basis.
- Strategic assignments' primary purpose is to fill very senior and critical international positions; intercultural competence is highly required in order to be successful on the job, and gaining new skills can be a secondary goal.

The combination of the MNC's overarching strategy coupled with the category of assignment will determine the various strategies employed throughout the HR value chain. However, one of the major problems facing MNCs is expatriate failure. Expatriate failure is defined as the premature return of expatriates (Shaffer et al., 2006; Vogel & Van Vuuren, 2008). Expatriate failure rates seem to vary depending on the study and can be anywhere between 10 to 80 per cent (Harvey & Wiese, 1998; Jassawalla, Connolly & Slojkowski, 2004; Vogel & Van Vuuren, 2008).

⁸ Ethnocentrism: "the belief in the intrinsic superiority of the nation, culture, or group to which one belongs, often accompanied by feelings of dislike towards other groups" (Collins, 2007:563). Companies with an ethnocentric recruitment strategy are likely to employ expatriates from the sending country in the host country.

⁹ Geocentric: "having the earth at its centre" (Collins, 2006:679). These companies are likely to appoint people from all over the world in their various subsidiaries, placing the development and skill of the person in the centre.

Nevertheless, it should be kept in mind that expatriates who remain on assignment but who withdraw psychologically may incur indirect losses for the company. (Harvey & Wiese, 1998; Vogel & Van Vuuren, 2008). These losses can be anything from a reduction in productivity, market share, competitive position, to damaged staff, customer and supplier relations as well as a discredited corporate image and reputation (Toh & DeNisi, 2005; Mezas & Scandura, 2005; Vogel & Van Vuuren, 2008). Compounding these problems, international assignments are significantly on the increase and the use of expatriate here has escalated with 30 per cent in recent years (Mezas & Scandura, 2005).

It is therefore important to understand the underlying reasons for expatriate failure. These reasons may include family issues; unwillingness to be relocated, dual career issues, commitment to assignment, problems with adjusting in the new culture, lack of language abilities and inadequate training and compensation (Hainess & Saba, 1999; Mezas & Scandura, 2005).

3.8 Conclusion

Although personal characteristics, adjustment and cross-cultural competence are not the beginning and end for international business success; these are necessary yet not an all-encompassing ingredients for success (Johnson *et al.*, 2006). There is a popular belief that cross-cultural experiences will broaden a person's horizon; if this is the case, people who are exposed to these kind of environments should have enhanced career potential.

Migration involves encounters and confrontation with differences, requiring a broad range of individual adaptive responses. Geographical migration broadens the individual's horizon, fuels intellectual agility and increases the general level of learning; mobility keeps individuals in a state of awakening similar to the attainment of new competences and new knowledge (Papatsiba, 2005).

Boneva and Frieze (2001) argued that people who accept international assignments or who are interested in emigration possess a combination of personality characteristics that sets them apart from those who remain behind. The typical

migrant already has a minimum entrepreneurial drive (Emmerij, 2004), tends to be more work-orientated, have a higher achievement and power motivation, but a lower affiliation motivation and family centrality (Boneva & Frieze, 2001).

Inkson and Myers (2003) identified a list of skills that can be acquired through international experience, such as interpersonal, relationship and communication skills, self-confidence and self-esteem, a global perspective, independence and autonomy, technical skills (other than IT and teaching), new values, attitudes and personality characteristics, open-mindedness, tolerance, breath of perspective, focus and direction, general self-development, adaptability, flexibility and resilience, sociability and interest in people, conflict and crisis management, language development, appreciation of home, career development and time management skills.

The migrant gains the most benefits when the cultural context is treated less like a set of values and knowledge, but rather as access towards a new individual potential or a new sphere of individual activity; in other words, the new social-cultural context offers additional opportunities to the individuals to see what they are able to undertake, to surmount and to solve (Papatsiba, 2005).

Temporary migration is a substitute for permanent migration, it satisfies the desire for new experiences and boosts marketable skills in the domestic labour market, obviating the need for permanent emigration. Alternatively, temporary migration is a learning experience which provides enhanced knowledge and self confidence, thereby facilitating permanent migration. This resonates with the notion that employees increasingly have to assume responsibility for learning new expertise by setting new goals, monitoring their approach to these goals, and rewarding themselves for goal achievement. In essence, they must take an entrepreneurial approach to their own career management (Belaz, Williams & Kollar, 2004).



The purpose of this chapter is to discuss the methodology used to investigate the research question. Attention will be paid to the focus of the study, the research design, participation selection, the interview process, data analysis and ethical concerns. The study focuses on South African expatriates working in Zambia on international assignments, and the perceived effect of the offshore assignment on their career development. The researcher followed a qualitative approach, using purposive sampling to identify participants and unstructured interviews to collect the data.

4.1 Research Focus

The study explores the perceived benefits of an expatriate assignment on the career management of skilled South Africans. Skilled South Africans are classified as people who have obtained at least one professional trade or qualification, i.e. completed their trade tests and are qualified artisans. Career management is defined as a person's employability; in other words, their effective self-management, career self-efficacy, career resilience and career decision-making, referring to aspects such as planning, preparing for and adjusting to the demands of the workplace. Employability includes punctuality, honesty, reliability, dependability, initiative, helpfulness, cooperation, willingness to learn, sense of humour and moral integrity (Coetzee & Roythorne-Jacobs, 2007).

4.2 The Method of Investigation

4.2.1 Research Approach

Research that starts with a vague idea or an unclear research question that evolves around themes, motives or generalisations that are relevant to a general topic is called qualitative research. This type of research is appropriate when the topic is unfamiliar, and the researcher will only know the important questions once he/she is fully immersed in the data. The qualitative researcher is open to unanticipated data, prepared to change direction, and will constantly re-evaluate the focus early in the study (Neumann, 2003).

A qualitative research approach was selected for this study because the research question was unclear to the researcher at the onset. Very little research has been done on the effect of non-permanent migration on career development. It is therefore

relevant to undertake an explorative descriptive study with a view to identify themes, motifs or generalisations that could be translated into quantifiable variables in future studies.

The study further followed an explorative, descriptive approach. Neumann (2003) defines descriptive research as an attempt to describe a social phenomenon. It is used for many purposes, including the following:

- to provide a meticulous description;
- to find new information that can be used to contradict previous research;
- to report on the background or context of something.

This kind of open-ended, inductive exploration that is made possible by qualitative research carries the risk that the researcher may be inaccurate in his/her observations, inconsistent in the way people are interviewed, and biased in the way material is interpreted and analysed (Terre Blanche, Durrheim & Painter, 2006). The implication for this study is that the researcher can only use or focus on information that confirms his/her predisposed ideas. It is subsequently important to strive towards eliminating or controlling sources of subjective bias in the same way as in quantitative research (Terre Blanche *et al.*, 2006). For the purposes of this study, the researcher attempted to prove that short- term migration has no effect on people's careers.

4.2.2 Research Design and Participant Selection

The research design followed a qualitative data gathering process of unstructured interviews with relevant participants. Unstructured interviews purposefully do not use an interview schedule or a specific set of questions, as is the case with structured interviews (Welman, Kruger & Mitchell, 2006). Unstructured interviews are typically used in explorative research for specific purposes:

- to identify important variables in a particular area;
- to formulate penetrating questions on them, and
- to generate hypotheses for further investigation.

This method seeks to identify motifs or themes, and the participants were consequently allowed to tell their stories in their own words. This form of interviewing

is most appropriate when eliciting information about specific topics (De Vos, 2004). Seidman (in De Vos, 2004) suggests that people conduct interviews because they are interested in the stories of others. Stories, in essence, are part of a meaning-making process. Kvale (in De Vos, 2004) describes qualitative interviews as an endeavour that aims to explore the world from another person's perspective in order to uncover the meaning of their experiences and their lived world before scientific explanation.

The interviewer prepared a basic checklist to ensure that all relevant topics were covered during the interview. All participants were interviewed once and each interview lasted approximately one hour, covering three main areas. Data analysis commenced after the first interview, and subsequent interviews built on the themes and motifs of previous interviews, until the research questions were answered.

The three main areas were:

- **Part A (biographical data)** – this covered the interviewees' educational background, work experience prior to departure and an estimation of how long the participant expected to be outside the country.
- **Part B (time abroad)** - participants were encouraged to tell their "stories". This included employment history and the processes that were guiding changes.
- **Part C (reflection of the expatriate experience on their career development)** – this part of the interview covered the participants' perceptions of the change in their lives during and following the expatriate experience, skills gained and enhanced, learning and perceived effect on their career, non-work related events and how these affected them as well as the experiences that they perceived as negative.

4.2.3 Selection of participants

The Purposive method was used to select participants. Purposive sampling is a non-probability sampling method; this means that the sample size was not determined prior to the study (Neumann, 2003). Non-probability sampling is used in qualitative research studies. In purposive sampling, the researcher thinks critically through the factors of the research population and then chooses the sample group appropriately (De Vos, 2004). Recognition and formulation of the criterion for the selection of participants are consequently of pivotal importance (De Vos, 2004). This method is

particularly appropriate in three instances:

- when the researcher uses it to select unique cases that are particularly informative;
- the researcher may use it to select members of a hard-to-reach or specialised population;
- lastly, it is appropriate when the researcher wants to identify particular types of cases for in-depth investigation.

With purposive sampling, the researcher approaches a few individuals who have similar life experiences (Terre Blanche et al., 2006). In this study, a group of expatriates who were on a two-year expatriate assignment in Zambia was selected. This method was appropriate because the objective of the research is to study expatriates on short-term assignments as well as their views of the effect of the expatriate experience on their future career.

4.2.4 Data Analysis

The first interviews were conducted in 2007 by the researcher with the last ones taking place during 2008. Data was collected in the form of interview notes (Neumann, 2003).

The analysis was done by extracting themes, motifs and generalisations from the data in order to present it in a coherent and consistent manner. Data analysis started from the onset of the research project (Neumann, 2003), and new themes or motifs were verified by subsequent interviews until the research questions were answered. The data was coded using three stages of coding: open coding, axial coding and selective coding.

During open coding the researcher located themes and assigned initial codes in a first attempt to condense the masses of information into categories. The researcher focused on the actual data and assigned code labels for themes, and there was no concern about making connections amongst themes or elaborating on the concepts the themes represented (Neumann, 2003).

With axial coding, the researcher proceeded with an organised set of initial codes or preliminary concepts. In this second phase, the focus is on the initial coded themes rather than on the data. Additional codes or new ideas may be included, and the plan was to organise themes and new ideas, to ask about causes, consequences,

conditions, interaction, strategies and processes and to look for categories or concepts that cluster together (Neumann, 2003).

Selective coding involved scanning data and previous codes, where the researcher selectively looked for cases that illustrated the themes. The researcher proceeded to draw comparisons and contrasts after well-developed concepts and continued to organise the overall analysis around several core generalisations or ideas, where major themes or concepts guided the researcher's final search (Neumann, 2003).

4.3 Ethical Issues Surrounding the Study

De Vos (2004) defines ethics as: "a set of moral principles that are suggested by an individual or group, are subsequently widely accepted, and offer rules and behavioural expectations about the most correct conduct towards experimental subjects and respondents, employers, sponsors, other researchers, assistants and students." Ethical concerns can include harm to experimental respondents, informed consent, deception of respondents, violation of privacy, actions and competence of researchers, cooperation with contributors, release or publication of the findings, and the debriefing of respondents.

4.3.1 Informed Consent

To gain informed consent before a respondent participates in a study means that all probable or sufficient information on the aim of the study, including procedures that will be followed during the study, likely advantages, disadvantages and dangers to which the respondents may be exposed, as well as the credibility of the researcher, are made clear to the respondent before he/she agrees to participate (De Vos, 2004). The researcher obtained informed consent by clearly explaining the purpose of the interview and the study to the participants, as well as what would happen with the results and their personal information afterwards. The researcher did not withhold any information in order to deliberately deceive those taking part in the study. All responses were used for the purposes as described to participants.

4.3.2 Violation of Privacy / Anonymity / Confidentiality

Singleton *et al.* (in De Vos, 2004) define the right to privacy as the individual's right to decide when, where, to whom, and to what degree his or her attitudes, beliefs and behaviour will be revealed. The purpose of giving information anonymously is to

guarantee the privacy of respondents. The ethical dilemma is when the respondents are guaranteed anonymity while the researcher knows that this will not be the case. Anonymity can be compromised by storing information on a computer where unauthorised people can gain access to it, or when requests are received from institutions, data banks, professional organisations, or other third parties to gain access to the data. To eliminate these possibilities, the data was saved in the form of interview notes on the researcher's personal computer, to which only the researcher has access, and the researcher ensured that the data was protected by a password.

4.4 Conclusion

This chapter discussed the methodology used in the research study. It focused on the research question, approach, design and selection of participants. It also highlighted potential ethical concerns. Chapter Six will present more information on the participating company, the characteristics of the sample as well as the research results.



5.1 Introduction

This chapter presents a discussion of the results of the research study, as well as the various themes and motives identified during the research process. The study was conducted in a South African-based multi-national company. The studied company was selected due to the frequent use of foreign assignments and its systemised expatriate management and support practices. The sampling frame for this study was set to include all expatriates that had been on their assignment for a minimum of at least 12 months. The minimum stay of 12 months is considered relevant as culture shock should smooth out after the first half year, and by this time all expatriates included should have passed the initial problems of adjustment and performance (Holopainen & Bjorkman, 2005). In the entire data collection a total of 18 expatriates fulfilling these requirements were identified, using the purposive sampling procedure. All selected expatriates were contacted to participate in a one-on-one unstructured interview with the researcher. Each interview lasted approximately one hour, where the interviewer facilitated a discussion around the three areas highlighted in Chapter Four, paragraph 2.2.

The data analysis started after the first interview, where themes and motives were identified and verified in subsequent interviews. At the completion of the final interview the researcher started coding the data, using three stages of coding. During stage one the researcher identified a number of possible themes in each interview data set, and code labels were assigned for these themes. Themes were then verified across the various data sets for number of times mentioned. During the second phase of coding, the researcher investigated the themes and motifs identified and asked questions about possible causes, consequences, conditions, interaction and processes in order to cluster the themes together and to start formulating concepts. During the final stage of coding, the researcher looked selectively at the clusters and potential concepts for cases that specifically illustrated themes related to the research question. During this stage, the researcher drew comparisons between the data obtained through interviews and the literature, and continued to organise the overall analysis around several core generalisations.

The results and discussion on the data will be represented simultaneously in this chapter, following the basic outline of the unstructured interview. Part one will focus

on the biographical information that was collected for the entire sample, and will be represented by means of descriptive statistics.

Part two will explore the duration that the participants were expatriates, their employment histories, their qualifications, previous management experience, current positions, previous expatriate experience, organisational tenure, remuneration, intention to return to South Africa, current conditions while on the project and expatriate failure.

Part three will discuss the expatriates' reflection on their experience and their perception of the effect of the expatriate assignment on their future careers.

5.2 Background to The Company

The researched company follows a centralised strategy. They aim to implement the values, policies and culture of the home company in the host company, despite possible environmental or cultural differences. Control of the subsidiary is important for them, and the host company has very little room for autonomy. Knowledge is ultimately created and retained at the home company, and their Human Resources department follows an ethnocentric¹⁰ approach towards global staffing (Caligiuri & Colakoglu, 2007). In other words, the company believes that the local people do not have the necessary skills and knowledge to perform the job at this moment, and they are therefore employing expatriates.

The specific project that the expatriates are part of in Zambia is a green fields copper mine. "Green fields" refers to the process where a new mine is started. This specific mine is owned by and Australian company that is listed on both the Australian and Canadian stock exchange. The company has a contract with the mine to supply them with earthmoving equipment, and during the construction phase that started in November 2006, the company had to assemble all the earthmoving equipment on site. The company is in the process of moving towards a maintenance and repair contract, where they will be responsible for all services and breakdowns on the equipment.

¹⁰ Ethnocentrism is "the belief in the intrinsic superiority of the nation, culture, or group to which one belongs" (Collins, 2007:563).

5.3 Part one: Biographical Information

The sample consisted of 18 participants who are on two year-assignments in Zambia. All participants have completed at least the first year of their assignment.

Table 6: Frequency - Age Distribution

Age	Frequency	Percentage	Cumulative Percentage
60-69	1	5.56%	5.56%
50-59	4	22.22%	27.78%
40-49	5	27.78%	55.56%
30-39	6	33.33%	88.89%
20-29	2	11.11%	100.00%
n	18	100.00%	

According to table six 89% of the sample are older than thirty, and six per cent of the sample are older than 60. This indicates that 83% of the sample are between 30 and 60 years old. At least 56% of the participants moved beyond the stage of 'early career' and are now in the mid-career phase. This phase in a person's life is often characterised by: fear of lost youth and missed opportunities, awareness of aging and mortality, failure to accomplish significant dreams, the inability to achieve an acceptable balance between work and family commitments, and the need to shed youthful illusions that propelled the earlier part of a person's career and life. It is not surprising that many mid-career employees become restless, and several make drastic occupational changes or pursue alternate life-styles. Some may experience a burst of ambition to fulfil long-standing goals, whereas others may lessen their attachment to work and turn their attention and energies toward their families and other interests (Greenhaus *et al.*, 2000). The age distribution in this study seems to be in line with the age distribution in other expatriate studies. In the five studies that reported on the age of their samples, expatriates tend to be between 30 and 60, with one study widening the bracket to include expatriates from 20 upwards (Shaffer *et al.*, 2006; Lee & Crocker, 2006; Gowan & Ochoa, 1998; Haines & Saba, n.d; Van Vuuren & Vogel, 2008).

Table 7: Frequency - Gender

Gender	Frequency	Percentage	Cumulative Percentage
Male	18	100.00%	100.00%
Female	0	0.00%	
n	18	100.00%	

According to table seven, 100% of the sample are male. This is reflective of the lack of women in the heavy earthmoving industry. Heavy earthmoving equipment maintenance is not a profession that women traditionally favour; this may be due to the mining environment which also reports a small number of women, as well as the size of the machines and the extreme physical nature of the job itself. However, out of nine studies on expatriates, only one reported a presence of 35% female expatriates, while the other eight studies' samples consisted primarily out of men (79% upwards, with six reporting less than 14% women) (Holopainen & Bjorkman, 2004; Shaffer et al., 2006; Black *et al.*, 1996; Selmer *et al.*, 2007; Lee & Crocker, 2006; Gowan & Ochoa, 1998; Haines & Saba, n.d; Naumann, 1992; Van Vuuren & Vogel, 2008). This trend seems to suggest that companies generally tend to reserve their expatriate assignments for male employees.

Table 8: Frequency – Ethnicity

Race	Frequency	Percentage	Cumulative Percentage
White	15	83.33%	83.33%
African	3	16.67%	100.00%
n	18	100.00%	

From table eight it is clear that the majority of the sample are white South Africans (83%). None of the studies consulted on expatriates reported on the ethnicity of their sample, and it is therefore not possible to indicate whether the ethnic representation in this sample is representative of expatriates. The reasons for the small number of African expatriates in the sample were not clarified with the company, and it is therefore not possible to conclude that this is a result of their ethnocentric approach

to selection.

Table 9: Frequency - Language

Mother Tongue	Frequency	Percentage	Cumulative Percentage
Afrikaans	13	72.22%	72.22%
English	2	11.11%	83.33%
Other	3	16.67%	100.00%
n	18	100.00%	

Table nine indicates that 72% of the sample's home language is Afrikaans, 11% spoke English and 17% spoke another language. There are no studies indicating that mother tongue plays a significant role in expatriate success; however, the expatriates' ability to communicate in the mother tongue of the local employees will be to their advantage. In this particular case, the mother tongue of the local employees is Bemba, but Zambia's official language is English, making communication relatively easy for the expatriates.

Table 10: Frequency – Marital Status

Marital Status	Frequency	Percentage	Cumulative Percentage
Married	10	55.56%	55.56%
Single	7	38.89%	94.44%
Widowed	1	5.56%	100.00%
n	18	100.00%	

According to table ten, the majority of the sample are married with 39% being single. Four comparative studies indicated that the majority of expatriates are married or in a long-term permanent relationship (Holopainen & Bjorkman, 2004; Haines & Saba, 1999 Naumann, 1992; Van Vuuren & Vogel, 2008).

The sample is biographically similar to most samples obtained for expatriate research. The researcher can subsequently make some generalisations to

expatriates in general, taking into consideration the other limitations of the study as discussed in paragraph eight of this chapter.

5.4 Part Two: Time Abroad

During the second part of the interview participants were invited to discuss their educational and career history, to tell their story chronologically, starting from completion of school up to their current expatriate assignment. The same question were asked to all participants, and the results are represented using descriptive statistics.

Naumann (1992) found that there is a positive relationship between a expatriate's tenure, organisational level, performance, years of previous international experience, linguistic ability, age and relational ability and expatriate satisfaction¹¹, commitment¹² and involvement¹³.

Table 11: Frequency – Qualifications

Qualifications	Frequency	Percentage	Cumulative Percentage
Diesel Mechanic	5	27.78%	27.78%
Millwright	6	33.33%	61.11%
Diesel Fitter	3	16.67%	77.78%
Fitter and Turner	3	16.67%	94.44%
Rigger	1	5.56%	100.00%
n	18	100.00%	

Table 11 indicates that the majority of participants are millwrights 33%, followed by diesel mechanics 28% and diesel fitter or fitter and turners both coming in at 17%. Diesel mechanics, millwrights, diesel fitters, fitter and turners and riggers were identified by the Government of South Africa as a scarce skill in the country. The participants subsequently fit both the category of skilled as defined by the South African Government as well as the category of scarce skills (Deputy President, 2006). Their departure from South Africa constitutes a brain drain for the country.

¹¹ Job satisfaction: “the positive, emotional state resulting from the appraisal of one's job or job experiences” (Locke in Naumann, 1992).

¹² Organization commitment: “strong belief in the Organization's goals and values, a willingness to exert considerable effort on behalf the organization, and a strong desire to remain a member of the organization” (Mowdy, Porter and Steers in Naumann, 1992).

¹³ Job involvement: “the extent to which an individual identifies psychologically with his/her job” (Blau in Naumann, 1992).

Table 12: Frequency – Similar Position, Promotion or Demotion

Position Level	Frequency	Percentage	Cumulative Percentage
Similar level	13	72.22%	72.22%
Demotion	3	16.67%	88.89%
Promotion	2	11.11%	100.00%
n	18	100.00%	

Table 12 shows that 72% of the participants accepted an expatriate position that was on the same level as what they were on prior to expatriation, 17% accepted a position that was on a lower level which can constitute a demotion, and only 11% of the participants were offered a promotion opportunity. Table 11 in combination with table 12, further confirms that the expatriates were recruited into positions that they were already qualified for, and they should therefore be equipped to do the required tasks. Naumann (1992) found that similarities between an expatriate's domestic and foreign job can be positively related to expatriate satisfaction, commitment and involvement.

Many organisations reserve expatriate assignments for senior positions possibly due to the costs involved, or they use it as a development strategy for high potentials. This study found that the majority of the participants had no previous management experience and that they were mostly not recruited for management level positions as indicated in tables 13 and 14.

Table 13: Frequency – Previous Management Experience

Management Experience	Frequency	Percentage	Cumulative Percentage
Foreman	2	11.11%	11.11%
Supervisor	2	11.11%	22.22%
Middle Management	2	11.11%	33.33%
Senior Management	1	5.56%	38.89%
None	11	61.11%	100.00%
n	18	100.00%	

The majority of the sample consisted of participants with no management experience (61%), with only 17% of the participants with middle or senior management experience.

Table 14: Frequency – Current Management Position

Management Experience	Frequency	Percentage	Cumulative Percentage
Foreman	0	0.00%	0.00%
Supervisor	2	11.11%	11.11%
Middle Management	2	11.11%	22.22%
Senior Management	1	5.56%	27.78%
None	13	72.22%	100.00%
n	18	100.00%	

According to table 14, less than 32% of the sample participants are in management positions, indicating that a number of people accepted lower level positions in order to work internationally.

Table 15: Frequency – Previous Expatriate Experience

Previous Expatriate Experience	Frequency	Percentage	Cumulative Percentage
Yes	7	38.89%	38.89%
No	11	61.11%	100.00%
n	18	100.00%	

More than 60% of the sample participants did not have previous expatriate experience. Six out of the seven participants who had prior expatriate experience gained that experience in another African country, such as Darfur, Malawi, Mozambique, Tanzania, Zambia and Zimbabwe; two people have been to England, and one person had three previous expatriate experiences. Naumann (1992) linked previous international experience to expatriate success. “An individual who was unsuccessful in a previous international assignment would likely limit subsequent international assignments. Conversely, an individual who has experienced success internationally may be more receptive to subsequent international assignments” .

Table 16: Frequency – Number of Years Work Experience

Work Experience	Frequency	Percentage	Cumulative Percentage
0-10	4	22.22%	22.22%
11-20	7	38.89%	61.11%
21-30	3	16.67%	77.78%
31-40	3	16.67%	94.44%
41-50	0	0.00%	94.44%
51-60	1	5.56%	100.00%
n	18	100.00%	

According to table 16, the majority of participants have between 11 to 30 years' work experience, with only one person having more than 50 years' work experience, and 22% have less than ten years' work experience.

Table 17: Frequency – Participants Appointed Specifically for the Expatriate Contract

Appointed for Expatriate Position	Frequency	Percentage	Cumulative Percentage
Yes	14	77.78%	77.78%
Non	4	22.22%	100.00%
n	18	100.00%	

The vast majority of participants were selected and appointed specifically for the expatriate contract and were not previously attached to the home company. When expatriates are internal transfers they tend to have some degree of social integration into the organisations. In view of that, the argument is presented that expatriates start their international assignment with a reasonably positive attitude towards the company. Although there is no empirical basis for this argument, it seems instinctively logical that a disgruntled employee would be an unlikely candidate for an expatriate assignment. Conversely, the situation for new hires is more intricate. In this study new hires constitute the majority of expatriates, and their attitudes are probably more formative than internal transfers. Since new hires had little opportunity to achieve social integration into the organisation before departing for the foreign assignment, the local foreign organisation is relatively more important for shaping work attitudes, and pre-employment expectations are comparatively more important towards influencing work attitudes since expectations regarding both the company and the foreign assignment need to be clarified (Naumann, 1992).

Table 18: Frequency – Organisational Tenure

Organisational Tenure	Frequency	Percentage	Cumulative Percentage
0-2	14	77.78%	77.78%
3-5	0	0.00%	77.78%
5-10	1	5.56%	83.33%
10-20	1	5.56%	88.89%
30+	2	11.11%	100.00%
n	18	100.00%	

Seventy eight per cent of the participants have been with the company for fewer than two years, and this corresponds with the number of people who were externally

recruited for the expatriate positions. These positions became available during November 2006. Out of the four people who were seconded by the company, two have been with the company for an excess of 30 years.

Table 19: Frequency - Remuneration

Position	Comparative Ratio
Diesel Mechanic	180%
Millwright	181%
Supervisor	180%
Middle Management	183%
Senior Management	182%

When comparing remuneration packages on a net-to-net basis, the expatriates are receiving at least 80% more cash in hand per month. In addition to this, they also receive three meals per day, accommodation, all transport on site and between South Africa and Zambia, as well as an additional cell phone allowance, DSTV subscription and internet subscription. When including all the benefits, their total cost-to-company packages are likely to be double what they would earn in South Africa, making expatriate assignments very financially attractive.

When participants were asked why they applied for and accepted an expatriate assignment, two things were mentioned. Firstly, they viewed it as a challenge, and secondly, the financial compensation was very attractive. This is in line with what Greenhaus *et al.* (2000) referred to: for many a short-term assignment would provide them with the cash injection they need to finally pursue a dream, or to place them in a better position to prepare for retirement.

Table 20: Frequency – Intention to Return to South Africa

Intention to return to South Africa	Frequency	Percentage	Cumulative Percentage
yes	16	88.89%	88.89%
no	2	11.11%	100.00%
n	18	100.00%	

According to table 20, 89% of the participants intend to return to South Africa upon completion of their contracts. When they return to South Africa, their migration movement will be seen as brain circulation, because their departure constituted a loss to the economy, while their return with newly acquired skills will be seen as a

potential brain gain for the country. This is important, because at the heart of this study is the notion that expatriates would return, and that they would add additional benefits to their employer upon return. With almost 90% of expatriates expressing an intention to return, it becomes important for companies to focus on repatriation programmes, as well as mentoring and coaching programmes that will assist them towards obtaining the highest return on their investment.

Table 21: Frequency – Expatriate Failure

Expatriate Failure	Percentage	Frequency	Cumulative Percentage
Resignation	3	50.00%	50.00%
Dismissal	3	50.00%	100.00%
n	6		

Six (33%) out of the 18 participants did not complete their expatriate contracts before the study was completed. Half of these participants resigned, and half were dismissed after disciplinary procedures. This is in line with the expatriate failure rates of other studies.

Table 22: Frequency – Reasons for Expatriate Failure

Reasons for Return	Percentage	Frequency	Cumulative Percentage
Management	1	16.67%	16.67%
Remuneration	0	0.00%	16.67%
Circumstances on site	2	33.33%	50.00%
Disciplinary Action	3	50.00%	100.00%
n	6	100.00%	

According to table 22, the main reason for expatriate failure are disciplinary action taken against the expatriates, followed by the circumstances on site. The reasons for return were obtained through an exit interview with Human Resources, that was made available to the researcher.

5.5 Part Three: Reflection on Expatriate Assignment

During the final stage of the interview, participants were invited to reflect on their expatriate assignment. The following themes were identified: reasons for applying for the assignment, family support, planning for their foreign assignments, career management strategies, conditions in the host country, intention to return to South

Africa and competencies acquired. Not all participants reflected on all the themes identified, due the unstructured nature of the interviews. The results will therefore be presented in the form of a discussion rather than with descriptive statistics. Where appropriate, the number of times a specific theme was mentioned will be stated.

5.5.1 Reasons for Expatriation

There are as many reasons as there are international migrants for expatriation; however, Barry (1998) formulated three broad categories:

- general exploration;
- specific career goals; and
- escape from an undesirable work or personal situation.

When participants were asked for reasons why they emigrated, all of them stated financial reasons. The actual job they applied for played a significant part in the selection of a location for the expatriate experience. Development as well as promotion opportunities were an integral part of their decision-making. Although they were also looking for new challenges and ways of improving their financial positions, their careers or specific skills played a very important role in the strategy.

A small number of participants (11%) reported that circumstances at home were undesirable, for example immediate family members who were seriously ill, loss of jobs accompanied by severe financial pressure or a recent divorce. Even though they did not base their decision entirely on these circumstances, they did mention that they were influenced by these reasons.

5.5.2 Family Support

When asked about factors influencing them to take up international assignments, colleagues, family members or friends were often mentioned. Very few of the participants knew anyone in Zambia, and knowing people in the receiving country is often a central part of short-term migration to countries such as the UK and Australia. However, what was evident is that the expatriate experience is seen more as a family 'survival' strategy than exploration, with Zambia having very little to offer in terms of travel. The expatriate assignments for this group are single status, which means that their families had to remain in South Africa. Family support is therefore very

important for them. Married respondents indicated that it was a joint decision with their spouses for a predetermined period of time.

Even if migrants lived independently prior to migration, many receive strong support from the people in their worlds, implying that migration is not a lone adventure, but rather a socially-, and family-mediated experience.

5.5.3 Pre-Expatriation Planning

Career management strategies advocate careful planning of experiences in order to achieve objectives. When asked about their planning prior to their expatriation, participants indicated that they had very little knowledge of the project, the circumstances on site or Zambian culture, and that this information was not of paramount importance to them. Little knowledge of the new home culture circumstances and the temporary nature of the experience suggests a temporary minimisation of planning in favour of improvisation.

Although all participants had a job offer before they set off; when asked where they see themselves after the initial two year contract, most (83 %) said that they would like to continue working for the company, but they did not have an exact idea of what this future job would entail. Two people indicated that they would like to save money over the two year-period to start their own businesses, one person wants to start a business in South Africa, and the second person bought a farm in Zambia in order to farm. However, none of the participants had a clear idea of what the next step in their career should be, or has given much thought to it.

5.5.4 Career Management Strategies

Not all people measure their success on the same standards, and therefore a person's subjective definition of success may to a large degree be a reflection on their career anchor or internal career definition (Schein, 1990). Coetzee and Schreuder (2006) define career success as the objective and subjective sense of achievement a person experiences in terms of their career.

5.4.1 Challenging Work Environment

An overwhelming majority (85 %) of respondents defined career success as overcoming impossible obstacles, solving unsolvable problems, or winning out over

extremely tough opponents. They expressed high levels of self-efficacy and tend to anchor their careers in the perception that they can conquer anything or anybody.

When asked what they look for in new jobs or why they have chosen to pursue an international career, most of them said that they seek ever-tougher challenges, or enjoy being faced with increasingly difficult problems. Twelve people indicated that they would like a career where they can solve problems or win out in situations that are extremely challenging. Nine people equated success directly to overcoming difficult challenges. One person stated: “One of the most fulfilling moments in my career was when I managed to solve seemingly impossible challenges”. Eight other people mentioned similar highlights. Another participant mentioned that he specifically seeks out opportunities that strongly challenge his problem-solving and competitive skills, with similar sentiments echoed by nine other participants. One expatriate said: “working on a problem that is almost not solvable is more important to me than achieving a high-level managerial position”. Eight other people made comparable statements.

The researcher can subsequently conclude that the majority of participants are looking for some form of challenge in their careers. For people who anchor their careers in pure challenge, it is the one thing that matters most (Schein, 1990). The interesting thing is that this challenge does not necessarily have to be attached to their career. Many of the respondents chose an international career for the experience of living abroad over and above the challenge of the specific positions where they ended up. For these respondents, variety and the challenge of a new country were the main driving forces. This is evident in the large number of expatriates taking on similar roles, or positions that are at a lower level.

5.4.2 Technical or Functional Job Challenges

Just over half of the respondents indicated that they are highly motivated by the specific jobs that they are doing, and that they are constantly looking out for opportunities where they can challenge their own knowledge and skills; and they tend to build their identities around the content of their work, specifically the technical functional areas in which they are succeeding. They further indicated a strong desire to increase their skills in their chosen profession.

Eleven participants indicated that they would like to be able to provide expert advice

in their chosen profession, and that they would like their technical skills to be sought after. Ten participants said that they will only feel successful in their career if they can develop their technical and functional skills to a very high level of competence. Five participants indicated that they would rather become a technical manager in their field instead of becoming a general manager. One participant said, “I enjoy my work the most when I am able to use my technical skills”; similar sentiments were echoed by twelve other participants. The researcher therefore concluded that the single most important factor for these participants are that the content of the job must be challenging. When faced with demanding or unfavourable circumstances, they rely most heavily on the challenges they experience in their jobs in order to cope, and the opportunities for growth that these present. Participants who emphasised the importance of their technical skills also displayed the highest level of interest in the effect that their migration experience might have on future promotions, and were actively seeking out promotional opportunities.

5.4.3 Conditions in Host Country and Adjustment

All eighteen participants mentioned that the circumstances on site are very difficult, and that they find it extremely hard to adjust. The major concerns are:

- working long hours, they work six days a week, and every other week they work the full seven days, which means they only have a day off once every fortnight;
- numerous rules on site that are imposed on them by the mining company;
- the mine has a zero tolerance policy, and since the project started eight people were given 24 hours’ notice before they had to leave the site, with no hearing or possibility of return. This implied that they lost their jobs because their contract stated that they are employed for the specific project and they had no guarantee that the company in South Africa would offer them alternative positions should they get dismissed in Zambia;
- there is literally nothing for them to do once they have finished working for the day, because the project is still in its construction phase. The only two things that are available for relaxation are the gym and a bar;
- they do not have their own transportation on site, and can therefore not move around as they want to;
- their assignment is single status, and none of the expatriates have their families with them;
- there are very little career advancement opportunities for them in the project

itself.

Unfavourable conditions on site enhance negativity and increase the risk of premature expatriate return. Nine expatriates mentioned thinking about early termination of their assignments due to conditions on site.

5.5.5 Returning from Short-Term Migration

Out of the 18 people interviewed, six already returned to South Africa, four of them continued their career in South Africa with similar jobs that they held while outside the country. Two people accepted another expatriate assignment in one of South Africa's neighbouring countries. In a similar fashion, many respondents indicated that they were drawn into an 'expatriate' network where they became part of the South African community. They expressed a stronger sense of belonging and identification with fellow South Africans while outside the country than they felt before leaving South Africa. One respondent said: "even though I didn't know anyone before I relocated, I soon became part of a new family, people I could depend on and who would help me when I needed it". This new 'family' subsequently assisted them with finding alternative employment in South Africa.

Just as respondents generally did not leave for career reasons only, equally they did not return for career reasons. Family or family-related reasons were the number one motive for return, while the second most stated reason for return was the circumstances on site and management. Information obtained through the exit interviews gave the researcher some insight in terms of reasons for termination of assignment.

5.5.6 Competencies Acquired

Findings concerning the effects of short-term migration on career management need to be considered in the context that all participants viewed their experience positively. The results mirror Suutari and Brewster's (2000) study, whose findings indicated that respondents who were on self-directed foreign assignments at the time of his research were mostly optimistic about the effects of their experience on their future career prospects. Also, Inkson and Myers'(2003) study indicated that respondents who had already returned from an overseas experience pointed out that this experience had an overall positive effect on their careers.

Participants were invited to reflect on the skills that they have either acquired or enhanced as a result of their international assignment. Interpersonal (especially referring to interaction with other cultures), communication and relationships were most often mentioned (85% of sample mentioned these). The majority of participants (83%) indicated that the risk and challenge were more significant than they originally anticipated, and that they had to learn new coping skills. They mentioned a belief in their ability to be able to do what it takes (55%), having self-confidence (61%), being able to transfer their skills into a new context (33%), being able to motivate themselves (72%), keep their eye on the goal and optimism (72%), as key skills they had to enhance in order to cope with the changing environment.

When asked about additional skills that they have acquired, cross-cultural skills, a global perspective, independence and autonomy were mentioned. Cross-cultural skills refer to being able to communicate with people from different cultures and backgrounds, accepting the differences in other people without judging them and gaining knowledge of various aspects of other cultures. Participants also mentioned that they became aware of a “global village”:

“before I left, my world consisted out of my home town, and the rest of the world felt very far removed from me, I knew that it existed, but it wasn’t real to me. After being able to live and travel in other countries I realised how small the world has become and that I can look beyond the borders of South Africa for career opportunities”.

“My self-confidence greatly increased while living abroad, I learned to stand on my own feet, and I realised that I had the ability to handle most challenges that came my way”.

An increased awareness of self-knowledge was reported. Participants mentioned that they became aware of their own values and how that differs from the values of the people they encountered in their host country (33% of participants mentioned this). One responded explained:

“I had to learn that they had a new way of thinking, and that I had to adjust the way in which I express myself, in order for me to be understood”.

“I’ve learned so many new things about other people and their culture, my whole world-view changed. I have definitely broaden my horizons.”

5.5.7 Short-Term Migration and Career Management

Participants were asked what they believed the effect of their migration experience was, or would be on their career. Without exception (100%) participants believed that their experience would have a positive effect on their career; even those who did not seem to adjust well, and who would - if given a choice - rather return home early, said that they believed the expatriate experience would benefit them in future. Increased self-confidence, independence, autonomy, enhanced technical skills, adaptability, flexibility a deeper appreciation for South Africa, and a more definite idea of what they want to do with their lives were offered as benefits of the expatriate experience.

5.6 Discussion

The Oxford Dictionary (2006) defines globalisation as the process whereby financial and investment markets are empowered to operate on a global level. This specific project in Zambia is a very good example of globalisation. The mine is owned by a company that is listed on both the Canadian and Australian stock exchanges, and this means that essentially they are owned by Canadian and Australian investors. One direct consequence of this is that expatriates have to adhere to legal requirements of Australia, Canada as well as Zambia. At the same time, the company that I investigated is a subsidiary of a Japanese Multi-national Company, and they are listed on the Japanese and American stock exchanges. The equipment that the expatriates are responsible for are from the parent company in Japan, a subsidiary in Canada and a subsidiary in South Africa. The company is therefore obliged to adhere to certain laws and requirements from Japan, South Africa, America and Canada. The implication of this global project is that expatriates need to negotiate the laws, practices and cultures of at least six countries (South Africa, Australia, Canada, Japan, America and Zambia). Some of the major challenges that the managers face in this project are the questions of jurisdiction, legal compliance and logistics.

The expatriates in this project are mainly accidental tourists and economy-class passengers. A number of them were internal transfers from the subsidiary in South Africa to the project in Zambia, and they largely made up the management team. A second group of people was recruited from outside the company specifically for the

project, and based on the interviews, their main reasons for taking on the assignments were financial. This means that they fall within the economy-class passenger category. Zambia provides little in terms of academic advancement and travel, and therefore the chances of finding pilgrims and passengers are limited. Lastly, although there are entrepreneurial opportunities in the larger Zambian project, this specific company does not allow for these, and therefore there were no explorers in the expatriate sample interviewed (Mahroum, 2000).

A relatively strong migration network exists for people wanting to venture into Africa, and at least five of the expatriates were introduced to the project through word of mouth, and four people were selected through international recruitment agencies (Meyer *et al.*, 2001). Migration tends to be a selective process, focusing on the voluntary rather than forced aspect, favouring certain people who possess shared skills and personality characteristics - and this project is no different. Although the company is setting up a site comprising of various levels of skills as well as a number of support staff, the government is very restrictive in terms of granting work permits. Only technically skilled people with adequate experience can apply for a work permit. The company has to prove that equivalent skills are not available in the local market. This means that the expatriate group makes up only 25% of the company workforce on site.

Integration of expatriates into the host country and society is determined by the extent to which they are given rights and entitlement (Crush & Williams, n.d.). As was described earlier, the conditions on site for the expatriates are in some ways very hard and limiting and they have almost no rights or entitlements. As a result, they find it very difficult to adjust into the country and to make it their home. They regard it as a place to work and tolerate. Due to the limited amount of input that they have, expatriates feel that they do not always have the opportunity to use their human capital or skills to the best of their ability. In exit interviews the expatriates indicated that they have very little say in how they do their jobs, and decisions were made by management. Millwrights, fitters and turners, riggers and diesel mechanics are on the National Scarce skills list published by the Deputy President at the launch of the JIPSA initiative (2006). When these people choose to leave the country to work somewhere else, it amounts to a brain drain for South Africa, and when those skills are not adequately utilised in the host country, it constitutes a brain waste (as is the case with the 16% of participants who took on lower level jobs).

Although there are some negative aspects associated with this project, it still provides expatriates with a fair amount of exposure to the elements that would assist them to be competitive. Coetzee and Schreuder (2006) made 12 predictions in terms of future careers; this project provides them with exposure to five of these:

1. they are confronted with less job security than a traditional career would have given them. They each receive a two year-contract, with the option of renewal based on performance. If they cannot renew their contracts, or choose not to, they will have to find alternative employment.
2. They are exposed to at least five other companies on site, providing them with an opportunity to build social networks, not only within their own company but also with various other companies, and people from across the world.
3. They spent most of their time on what they do best, and they have to collaborate with other professionals and support staff for complementary competencies.
4. They are faced daily with ambiguity, and mastering this is key to their success. Because they work in a remote area the resources are not always available, forcing them to come up with creative solutions.
5. They have fixed targets, and a strong emphasis is placed on providing results.

Management expect increased working hours, they are given addition responsibility (training of local employees for example), they are faced with an enormous amount of ambiguity and they have to proof that they have more skills than the locals. These requirements are met with significantly higher pay, end-of-assignment performance bonuses and development opportunities. All of this should theoretically place these expatriates in a better position to increase their employability.

5.7 Practical Implications

The study agrees with literature that an expatriate assignment provides skilled people with the necessary exposure and opportunities to acquire self-knowledge, build networking relationships, understand their own values, attitudes, internal needs, identity and preferred lifestyles. Having exposure to these elements should place expatriates in a favourable position to manage their own careers and to increase their employability (Coetzee & Schreuder, 2006).

However, what they also need in order to be successful is the ability to know with whom to build networking relationships, to know when and where to enter the workplace, to find relevant training, and have a sense of timing for planning their choices and activities in order to achieve maximum return on investment (Coetzee & Schreuder, 2006).

An expatriate experience can therefore be seen as an unique exposure opportunity that provides individuals and management with ample opportunities to develop and build on the skills that will assist them in becoming highly employable and competitive in the 21st century work context.

However, exposure does not translate into acquired skills or developed competencies. Johnson *et al.* (2006) warn that not all people are equally equipped to acquire the skills and knowledge for success in another country. Therefore, if companies aim to make the most out of their expatriates, they should consider the following:

- provide expatriates with the necessary and relevant training;
- develop policies that address expatriates' concerns in terms of their career development, for example possible career paths, and explain possible positions that they would qualify for at the completion of their assignment;
- provide expatriates with formal performance management and informal feedback opportunities;
- provide them with career support in the expatriate environment (for example, exposure to new work experiences, learning activities and developing a network for career development purposes);
- provide expatriates with emotional support, especially in the absence of family and other support structures;
- create mentoring and coaching opportunities for expatriates, where they can be assisted to translate their exposure into skills that they can use in the workplace.

5.8 Limitations of Study

This study has some potential limitations that may restrict the usefulness of its findings. The data were collected through unstructured interviews with expatriates. Like most other research on expatriates the study made use of single method variance, as the same respondent provides information on both the dependent and independent variables (Caligiuri & Colakolu, 2007; Gowan & Ochoa, 2002; Haines & Saba, 1999; Stahl & Caligiuri, 2005; Naumann, 1992). The study further relied on subjective evaluations of the factors by the expatriates themselves, and while this may increase our understanding of the expatriates' perceptions of their future career development, it does not provide scientific evidence of the true relationship between the expatriate's exposure on an international assignment and future career success. If a positive relationship is detected between expatriate assignments and career development, this may reflect the implicit theory of the respondent rather than any true relationship. Conducting longitudinal research and gathering data on the independent variable before and after the assignment, or using multiple informants, may help the researcher to overcome this single-method bias.

Another potential weakness of the study is its cross-sectional research design. Expatriates were asked what they believed the possible effect of their expatriate experience would be on their future careers. Because the interviews took place while the expatriates were still in their current positions, it can only provide the researcher with the expatriates' perceptions of future opportunities, and not with information regarding actual advantages gained.

Last, but not least, the highly exploratory and descriptive nature of this study with its small purposive sample in one company renders the findings in this study highly tentative, and conclusions based on the results of the study must be made with caution. To better understand the limits of the generalization of the findings, the study should be replicated with different samples.

5.9 Recommendations

The results in this study provide some insightful findings on the career development of expatriates, and these findings could enable us to better understand the career development opportunities an international assignment represent. It is suggested that

future research should conduct longitudinal studies which will test the findings of this study. A longitudinal approach may generate richer data where the actual effects on career opportunities and acquired skills and competencies can be identified and compared over time. A comparison of the results between qualitative and quantitative study would further identify the causal relationships among the research constructs. While a number of studies have relied on self-report measures produced by expatriates, it appears more relevant to solicit the perceptions of the expatriate's direct superior. The superior is ultimately responsible for the performance of the expatriate and may be less biased in their estimation of the expatriate's performance, and would subsequently be able to comment on actual changed behaviour and new competencies acquired.

Future research would benefit from a closer examination of the factors that would facilitate expatriates in the process of translating exposure into changed behaviour, as well as the role that the company can play in creating a context where expatriates can be assisted to make the most out their expatriate experience.

5.10 Conclusion

Although the study answered the research question in the sense that expatriates believe that their international assignment would benefit them in their future careers, research still needs to prove that these perceptions will be able to translate into actual future career success. Chapter five discussed the various findings of the study, indicating its practical implications, and pointed out the limitations and recommendations for future research.

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